Oracle® Cloud

Creating Experiences with Oracle Content and Experience Cloud

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Oracle Cloud Creating Experiences with Oracle Content and Experience Cloud,

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Preface

This document describes how to use and manage content stored in Oracle Cloud.

Audience

This publication is intended for Oracle Cloud users who want to work with files using a web browser, via the desktop synchronization application, or a mobile device.

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 that have purchased support 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.

Related Resources

For more information, see these Oracle resources:

- Oracle Public Cloud:

  http://cloud.oracle.com
- *Getting Started with Oracle Cloud*

- *Managing Content with Oracle Content and Experience Cloud*

- *Administering Oracle Content and Experience Cloud*

- *Developing for Oracle Content and Experience Cloud*

- *What's New for Oracle Content and Experience Cloud*

- *Integrating Oracle Content and Experience Cloud*

- *Known Issues with Oracle Content and Experience Cloud*Known Issues with Oracle Content and Experience Cloud

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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1
Get Started with Creating Experiences

Oracle Content and Experience Cloud is a cloud-based content hub that makes it easy to manage your experiences, content, and digital assets. Governance enables efficient creation of experiences with consistent messaging and security, while providing powerful central management. Asset management enables collaboration on content and reuse of assets wherever you need them across your enterprise.

Content, whether it's text or graphics, is at the heart of all marketing and sales efforts, and with Oracle Content and Experience Cloud you can easily manage all of your content easily and effectively.

You can upload files into folders, share files and folders, and collaborate on content using conversations. Those features are discussed in detail in *Managing Content with Oracle Content and Experience Cloud*.

You can also manage your digital assets, which is content to be used in ad campaigns, on websites, in blogs, or anywhere you want to create a user experience. Asset management has several components:

- Create customized repositories where you can store all the content you need for your campaigns and publications. The type of content you store can be images or content items, which are files with text that can be used in various layouts and which can be translated. Policies are applied to the repository that specify how assets in the repository are managed. For example, you may have a repository containing information about a product line, such as desktop computers. Policies for that repository can dictate when an image can be used (if it's approved or not, for example), and what languages are used to translate content items. See Understand Asset Management and Publishing to get the complete picture of how it all fits together.

- Manage your assets in the repositories. You can set up collections to manage a subset of assets within a repository. For example, in the Desktop Computer repository, you may have a collection that groups all-in-one desktop computers and one for tower types of desktop models. The assets you've uploaded can be assigned to the appropriate collection and managed there, making it easy to find what you need. You can also create content items based on content types, allowing you to create content that is managed separately from its appearance, such as blogs or articles. See Work with Digital Assets and Use Structured Content.

- Use sites to build websites that take advantage of the assets you've uploaded. You can quickly put together a website using the templates that are provided, modifying them by adding or removing components as needed. You can also upload customized components and templates, or copy and modify existing themes, layouts, and templates. Enable governance to make it easy for business users to create sites that conform to company policy and give site administrators an easy way to control and track sites from a centralized location. See Get Started with Sites and Understand Site Governance.

It's important to understand how the different organizational and user roles determine who can create and use repositories and assets. For details, see Learn About User Roles.

What's New

Feature	Description	Introduced in
Adobe Creative Cloud extension	Use the assets stored in Oracle Content and Experience Cloud in your Adobe Creative Cloud applications, such as Photoshop. See Use the Adobe Creative Cloud Extension.	19.1.5 — March 2019
Asset categorization	Create taxonomies of hierarchical categories to organize your assets and to help users find assets by drilling down into the area they're working on. See Create and Manage Taxonomies. Taxonomies are available only in Oracle Cloud Infrastructure, not Oracle Cloud Infrastructure Classic.	19.1.5 — March 2019
Light-weight image editing	Crop, rotate, or flip an image, or change the format, background color, or image quality. Then save the new image as a new rendition, a new version, or a completely new asset. See Edit an Image.	19.1.5 — March 2019
Translate assets with sites	Create translation jobs that include a site's targeted assets as well as the pages and structure of the site. See Translate a Site.	19.1.5 — March 2019
Improved asset publishing validation	When you publish assets, the validation results now list not only the status of the selected assets, but also any associated translations and any dependent assets. The information about why an asset failed validation has also been improved. See Publish Assets.	19.1.5 — March 2019
Add specific rendition of image to a site	When you add a digital asset to a site, you can select a specific rendition of the image, and you can have the latest version of the asset published along with the site.	19.1.5 — March 2019
Site governance	Site governance makes it easy for business users to create sites that conform to company policy and gives site administrators an easy way to control and track sites from a centralized location. See Understand Site Governance.	19.1.3 — February 2019

Feature	Description	Introduced in
Translate sites	Export site files for easy translation outside of Oracle Content and Experience Cloud, then import the translated files. See Translate a Site.	19.1.3 — February 2019
Image Rendition Support	You can upload custom renditions of your images to suit the channel they're published to (mobile, tablet, web, etc.). See Manage Image Renditions.	19.1.3 — February 2019
New Oracle WebCenter Content asset connector	Browse for assets stored in Oracle WebCenter Content. See Add and Remove Assets.	19.1.3 — February 2019

Understand Asset Management and Publishing

Let's look at some of the features available to manage and publish your assets.

Repositories

A *repository* is used to store all the assets needed for a project or a group or a campaign. Repository administrators can set up as many repositories as needed for different asset management projects. Each repository has taxonomies, content types, publishing channels, and translation languages associated with it. These features are chosen when the repository is first created. See Understand Asset Repositories and Create and Share Asset Repositories for complete details.

Taxonomies

A *taxonomy* is a hierarchy of categories used to organize your assets and to help users find assets by drilling down into the area they're working on. You can assign a taxonomy to more than one repository, and you can assign multiple taxonomies to a repository. For example, you could create different taxonomies for each department and for each product or initiative in your business. Then you could apply "Marketing Department" and "Products" taxonomies to your Marketing repository, and apply "Sales Department" and Products" taxonomies to your Sales repository.

> **Note:**
>
> Taxonomies are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

Publishing Channels

A *publishing channel* is where publishing rules are defined. A *targeted channel* is one that will be used by assets. In other words, an asset can be 'promised' to a targeted channel and once it's published, it's a part of that channel. When an asset is set to be published, it's evaluated against the policies that were defined for the targeted channel. If the asset doesn't meet the policy criteria, then it can't be published. This assures that the assets that are published are only those that have been validated

against the policies that were created. See Create and Share Publishing Channels and Publish Assets for more information.

Localization Policies

Localization policies can be created for multiple language assets. Any asset that uses text for its content, such as a content item, can be translated into multiple languages. You can view the default language version of a content item and choose to copy certain information, or create all new content for a localized version. The rules for what languages are used for translation are defined in a localization policy and that policy can then be associated with a publishing channel. You can apply that publishing channel to individual assets, letting you fine-tune what's translated. See Create Localization Policies for details.

Structured Content

Structured content is also considered an asset, managed in a repository. This kind of content exists separately from any file or layout. When you create a Microsoft Word document, for example, it's stored as a file and it has certain aspects stored with it: the text in the file, the font used for headlines and paragraphs, the margins for the file layout, and perhaps a page border or a picture used in the file. When you use structured content, however, the *content* is managed independently of the content appearance. The elements of the content—the paragraph text, the headline text, the image file—can all be used wherever they're needed, either as one cohesive group or separately in different layouts and formats.

For example, let's say your company wants to create a website and one of the pages on the website will have contact information for employees. In addition, you want to have another page that has detailed information about the employees, such as a picture and a brief biography.

You could copy and paste the pertinent information into the appropriate spot, but what if the information changes? Then you would need to change the data in several places. A better solution is to use structured content.

A content item is a piece of structured content, managed in a repository or a collection. It follows the channel policies and localization policies that are set for the repository where it is stored, and goes through the same publishing process as other digital assets. A content item can be translated into multiple languages as needed and each version of the item can go through a separate workflow. This means that you can manage a French version, for example, separately from the Spanish or the English version. The English version may be published and in use while the French version is out for review and the Spanish version is still in draft form. See Understand Structured Content for details.

Get Started with Sites

Anyone with the proper permissions is capable of building a website with Oracle Content and Experience Cloud. You don't need to use any proprietary tools or code or software. The user interface is graphical, intuitive, and friendly.

Who is able to build a site depends on several factors:

- Whether your service administrator has enabled site creation.
- Whether your service administrator has enabled site governance. See Understand Site Governance

- Whether site creation is limited to site administrators (available when site governance is disabled).
- Whether your site administrator has made templates available.

When you create a site, you begin with a template. A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components. See Understand the Site Creation Process.

If you're creating an enterprise site, it will be associated with a repository, which must be created before you create a site. You store the assets and documents you need for the site in the repository, and the repository policies dictate what can be done with the assets. See Understand Asset Repositories for details about how to use repositories.

When you edit a site, you create a new update or use an existing update. Within an update, you can edit and add content, adjust the style settings, add and delete pages, change page layouts, and organize pages. See Quick Tour of the Site Editor to find out what you can do with the editor.

Updates don't need to be ready all at once. You and your team members can work on multiple updates concurrently and independently. For example, you might be working on an update with weekly news while another team member is adding pages for an upcoming sales conference. You can edit, review, and save changes to your updates as often as you need to and merge an update with the base site at any time.

When you're ready, launch your site. Just a single click publishes your site to the web. That's it in a nutshell—from concept to launch.

Understand Site Governance

Site governance makes it easy for business users to create sites that conform to company policy and gives site administrators an easy way to control and track sites from a centralized location.

The Problem

There's a problem in the industry today. Companies are suffering from experience explosion. These experiences need to be created and deployed quickly, with central visibility to keep with company branding and messaging. Enterprises often find it takes forever to develop and deliver new experiences. To be successful, your company needs powerful and adaptable technology so you can scale, with speed, to create and manage many experiences consistently—and propel product or brand initiatives. You need to quickly and efficiently make new experiences available, or you'll miss market opportunities, and not engage customers and prospects optimally.

Experience explosion is often the result of years of separate, siloed initiatives, during which each division, brand, and team acquired web content management (WCM) systems without central oversight. This creates a complicated environment that is slow to market, vulnerable to security threats, and inflicts spiraling and unpredictable costs.

A lack of consistent processes for building experiences along with the use of a disparate mix of WCM technologies exposes your organization to massive security risks. When multiple stakeholders each own a little piece of the website problem, core responsibilities, such as security, become fragmented, leaving your enterprise vulnerable. All these experiences delivered from different WCM systems with different web application and IT infrastructure oversight make it difficult, if not impossible, to ensure everything is properly protected.

Plus, maintaining multiple high-priced commercial WCM systems results in duplicative costs—a gift that keeps on giving every year with license renewal fees and ongoing support costs from internal or external partners.

This leads to constraints on everyone:

- Constraints on the business:

    – No self-service; reliant on IT or expensive outsourcing

    – Inability to make updates without technical help

    – No business-friendly tools to manage the effort

    – No central visibility into all the experiences and activity

- Constraints on IT:

    – IT involvement needed for every experience

    – Lack of governance over experiences created by the business, including unmonitored outsourced experiences

    – Fragmented stacks used to build experiences

    – Must manage and deploy changes to content and layouts across hundreds of experiences

- Constraints on users:

    – Inconsistent messaging across channels

    – Out-of-date information

    – Poor performance, leading to channel abandonment

The Solution

Oracle Content and Experience Cloud's governance simplifies and accelerates experience delivery for business users while giving your IT departments an easy way to control and track experiences from a centralized location with the ability to fully manage the entire experience lifecycle, reducing the cost to create and maintain each new experience a company needs. Governance is built into the core of Oracle Content and Experience Cloud; it just needs to be enabled by your administrator. See Configure Sites and Assets Settings in *Administering Oracle Content and Experience Cloud*.
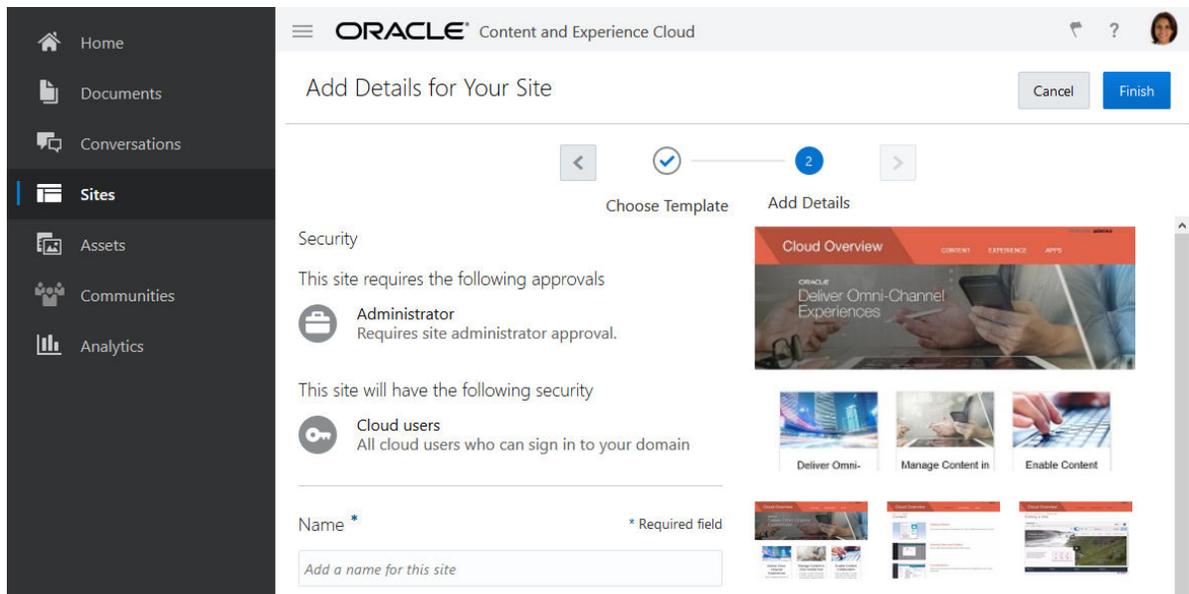
Features

- **Catalog of approved templates**—IT developers can populate a template catalog with a set of site templates for the needs of different lines of business. They can apply template policies to specify the type of security new sites must adhere to and whether new sites require approval. This allows for a fast and simple way to request new sites while ensuring that business users follow brand and security guidelines. See Change Template Policies.

- **Streamlined requests, approvals, and provisioning**—Give business users the ability to rapidly request new sites with required approvals and automated provisioning. See Create Sites with Site Governance and Manage Site Requests.

- **Site management**—IT departments can manage all sites from one place regardless of who created and deployed the site. IT users can monitor site status and change status for any deployed site. See Manage Sites and Site Settings.

Benefits

When you use governance, you'll see a reduction in cost to create and maintain each new experience.

- Benefits for the business:

  - Rapid provisioning without dependence on IT

  - Separation of content from design, enabling reuse

  - Manage experiences, users, and permissions globally in one console

  - Gain insights into experience operations via reports

- Benefits for IT:

  - No complex implementation (cloud-native solution)

  - Auto-scaling to deal with growth and seasonal peaks

  - Governance over experiences, ensuring they are secure and meet corporate branding and compliance standards

- Benefits for the user:

    – Consistent messages across channels

    – Up-to-date information

    – Optimal performance

    – Secure experience

The Process

Here are the steps involved with creating and managing sites using site governance:

1. Your administrator enables governance. See Configure Sites and Assets Settings in *Administering Oracle Content and Experience Cloud*.

2. A site administrator makes approved templates available to users for creating sites. See Change Template Policies.

3. A user creates a site request from an approved template. See Create Sites with Site Governance.

4. The site administrator approves the site request and the site is automatically created. The site administrator can also deny the site request with a note explaining why the request was denied, and the site creator can correct the issue and submit the request again. See Manage Site Requests.

5. The site creator continues the site creation process, editing and publishing the site. See Understand the Site Creation Process.

6. Ongoing site management and updates can be done on the Sites page. Site administrators can see *all* sites on the Sites page; other users can see sites they created or are members of. See Manage Sites and Site Settings.

Learn About User Roles

What you see and what you can do in Oracle Content and Experience Cloud are determined by how resources are shared and what role you're assigned. Roles are assigned by your service administrator, the person who manages all the features of your Oracle Content and Experience Cloud service.

Organization roles determine what tasks a person needs to perform in the organization. *User roles* control what features a person sees when using the service. And *resource roles or permissions* control what a person can do with content items, files, and so on.

Some common **organization roles** include:

- **Anonymous user:** a person engaging with a public website or other digital experience. This user can download documents or make purchases via a digital channel.

- **Visitor**: someone engaging your website, mobile site or other digital experience to learn about the company. Visitors can interact with specific secure sites, make a purchase, and so on.

- **Employee**: a person who shares documents with coworkers and views documents that were shared. They may also collaborate through conversations and create team sites or partner sites from pre-built templates.

- **Content contributor**: a person who writes articles to be published to a channel.

- **Administrators**: *Repository administrators* create and maintain repositories used to store digital assets. *Site administrators* create and manage sites, either enterprise sites or standard sites. *Content administrators* review submitted content and submit content to translation vendors.

- **Developers**: developers create and maintain tools used for websites, such as templates, themes, and style sheets. Those kinds of tasks are described in detail in *Developing for Oracle Content and Experience Cloud*.

User roles include:

- **Administrators**, including a *cloud account administrator*, an *identity domain administrator*, *site administrators*, *content administrators*, *repository administrators*, *storage administrator*, and an *entitlement administrator*.

- **Developers**, including *enterprise developers* and *standard developers*.

- **Users**, including *standard users*, *enterprise users*, and *integration users*.

- **Visitors**

Resource roles include:

- **Viewer**: people who can view content but can't edit or download it.

- **Downloader**: people who can download the associated resource and save it to a personal computer.

- **Contributor**: people who can view, download, and edit the resource.

- **Manager**: people who have full control of a resource.

Complete details about roles and their duties are found in Roles, in *Administering Oracle Content and Experience Cloud*.

2

Set Up Asset Repositories

You can create repositories to manage your digital assets, designating publishing channels and localization policies for each repository.

- Take a quick tour about the repository setup process (English only)
- Understand Asset Repositories
- Create and Share Content Types
- Create Localization Policies
- Create and Share Publishing Channels
- Create and Manage Taxonomies
- Create and Share Asset Repositories
- Create and Share Collections

Understand Asset Repositories

Repositories are a storage location for files, both text and images. Repository administrators can create a repository with publishing channel policies, localization policies, content types, and taxonomies designated for the repository. Multiple repositories can be created to handle all your business needs.

A repository can be used to manage all the assets you need in one place. For example, perhaps your company sells computer equipment. One repository could be set up to handle the files related to desktop computers. Another repository could be used for tablets. Each repository might contain photos, graphics, and content about the different kinds of computers. The assets in each repository are controlled by the policies you allocate to the repository. You need the repository administrator role in order to create policies and repositories.

After you've defined the policies, you can create a repository and choose which policies will apply to all the assets managed in that repository. You can also create a collection which can be used to manage subsets of items in the repository.

For example, let's say you want to create a repository to store images of computer tablets. Your company stocks a variety of tablets. Here's the process you could use to get your repository set up:

1. **Content types**

   You may need to create blogs or articles about some of the tablets to use on a website or in marketing materials. Design and create your content types for the blog articles, defining what fields are needed for the marketing materials. For some articles, you'll want people to add their name as the author, the title of the article, a picture associated with the article, and a large block of text describing the subject. That content type could be called "Blog Post."

   Other articles may need other information, such as a calendar date and a text field and checkboxes. That content type could be called "Sales and Marketing Data."

After you've created your content types, make sure to share them with users or groups of users. That way they can use those content types to create their new articles or blogs. See Create and Share Content Types for details.

2. **Localization policies**

   Next, define your localization policies for your content items, if needed. You can elect to have no localization policy for some repositories, but you'll probably want policies for some of the assets used. For example, maybe some of the blog articles will need to be translated into French or Spanish for your customers in those countries. Your image assets, such as photos or illustrations, are defined as non-translatable, but assets using text can be translated. You can define *required* languages and *optional* languages. For this example, you may want a policy called "French and Spanish" and one called "French only". See Create Localization Policies for more details.

3. **Publishing channels**

   Decide what publishing channels to use. You can choose to have anything published, or limit publishing to items that are approved. A channel can also be public or secure. If secure, it can be limited to a subset of people with specific user roles. You also can choose a localization policy to work with the channel. Remember, the channel and the policies apply to all items in the repository, whether they're content items or digital assets. See Create and Share Publishing Channels for details.

4. **Taxonomies**

   Define a taxonomy by creating a hierarchy of categories to organize your assets. You can assign a taxonomy to more than one repository, and you can assign multiple taxonomies to a repository. For our computer tablet example, you could create multiple taxonomies depending on how you want to categorize your products. You may need one for mini-tablets, one for larger tablets, one for two-in-one tablets, and so on.

   > **Note:**
   >
   > Taxonomies are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

5. **Repositories**

   After channels, localization policies, and taxonomies are defined, create the repository. As we mentioned previously in our example, you might want to create one repository for desktop computers and one for tablets. Each repository can use a combination of channels, localization policies, and taxonomies to customize how the assets in the repository are managed. You must share a repository with other users in order for them to add assets and content items. See Create and Share Asset Repositories for details.

6. **Collections**

   Define any collections you'll need. A collection is a way to manage a subset of items within the repository. For example, you may want to create a managed collection in the mini-tablet repository for Android versions, one for iOS versions, and one for other types. You can add items to the collection and target them to a specific publishing channel. In this example, perhaps the repository has two channels associated with it, Secure and Public. You can create a collection, add

assets to that collection, and have the items there be available only for the Secure channel.

It's important to understand how all of these features work for different users. Administrative users will be able to use the channels, content types, and taxonomies created by other administrative users in any new repositories they set up.

Non-administrative users will be able to see all associated content types in the filter pane on the asset page, and they can view and edit items of those types without explicit sharing. However, in order to create a new content item, you must share the content type with users.

In the same way, non-administrative users will be able to see all channels associated with a repository and they can target assets to those channels. But the channel must be shared with a user with a minimum of contributor rights in order to publish or unpublish assets to the channel.

Non-administrators will be able to categorize assets based on the taxonomies associated with a repository.

You can't share localization policies. Those are set at the organization level by a user with repository administrator privileges.

Create and Share Content Types

A *content type* is a framework used to specify what information is included in a content item. Content administrators can create content types and share them with others.

When a repository is created, a content type can be included with that repository so it's available for use there. In order for other people to use a content type to create a new content item, it must be shared with people.

Content types (1) can have **layouts (2)** associated with them, which determine how they appear and what information is used in that particular layout. For example, you may only want a subset of information to appear on an employee contact list, but you might want an employee picture, location, and job title appear in another location on your website. When you create a content item using a content type, you can preview how it will look with different layouts.
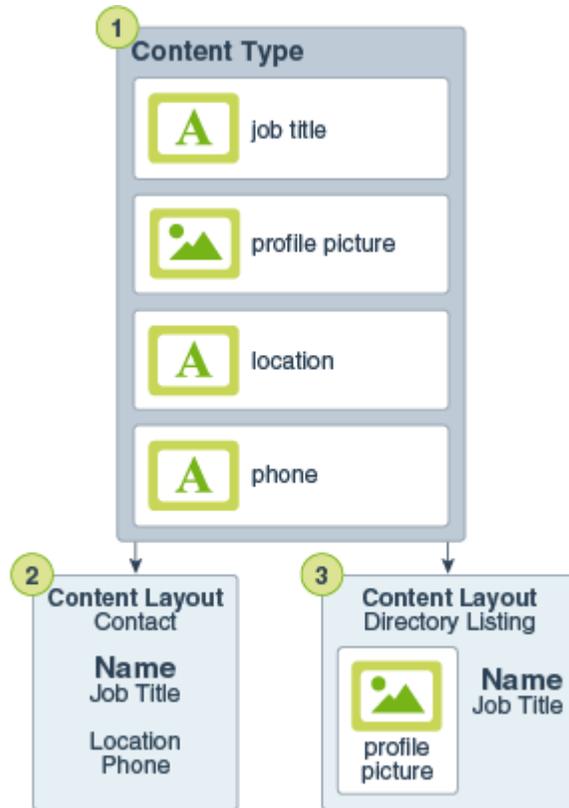
Creating Content Types

In order to create a content type, you must have content administrator privileges. After it's created, you need to share the content type with others so they can use it to create content items. Those content items can then be used on a website, or in a brochure, or wherever they might be needed.

1. Sign in as a content administrator in your browser and click **Assets** under Administration in the left navigation menu.

2. Select **Content Types** from the drop-down menu.

3. To create a new content type, click **Create**.

4. Enter a name and optional description for your content type.

5. Drag as many data fields as you need into the content type definition.

6. On the settings page for each data field:

    • Enter a name and description for your data field.

    • Optionally, edit the unique ID for the field.

    • If you selected text, media, or reference, select whether the field allows only a single value or multiple values and the number of values allowed.

    • Select if the field is required when users submit the content.

    Click **Next** after adding each data field to define the appearance for the field.

7. On the appearance page for each data field, set what your data field will look like and if you want to apply any kind of validation. Each data field has different

appearance values, such as validation, minimum or maximum length, the type of text editor to use, or if the data needs to follow a particular pattern, such as a valid email address or zip code.

When you add a large text field and set the appearance to rich-text editor, you can select the type of toolbar: standard, basic, or custom. See Customize the Rich-Text Editor Toolbar.

8. On the **Friendly URL** page for the content type, you can specify a readable URL for content items created using this content type.

9. On the **Content Layout** page for the content type, select the layouts that are associated with this content type for the mobile version and the desktop version. If the content item created using this type will be used on a website, the content layouts should be created and uploaded prior to creating a content type. You can associate additional layouts by clicking **Add Layout Style** then entering a name and choosing a layout. See Manage Custom Components and Layouts.

When a content item is created using this content type, the person creating the item can preview how the content item will appear using any of these layouts.

Share Content Types

You must share a content type with others in order for them to use it to create content items. Sharing a content type is like sharing any file or folder. Just select the type, click **Members**, and choose members to add to the type and choose the role they can have when using the type. You can share with individuals or with groups.

Users will be able to see all associated content types in the filter pane on the asset page, and they can view and edit items of those types without explicit sharing. However, in order to create a new content item, you must share the content type with users.

Customize the Rich-Text Editor Toolbar

After adding a large text field to the content type and setting the appearance to rich-text editor, you can customize the toolbar.

To customize the rich-text editor toolbar:

1. In the Large Text Settings dialog, on the Appearance tab, select **Custom** from the toolbar menu.

   The toolbar is prepopulated with the standard toolbar configuration, and you see a preview of it.

2. To customize the toolbar, click the **JSON** tab, and edit the JSON configuration. You can use either "toolbarGroups" and "removeButtons", or "toolbar" for the properties. See the examples below.

Example 2-1   Option 1: "toolbarGroups" and "removeButtons"

```
{
"toolbarGroups": [
{"name": "basicstyles"}
,
{"name": "styles"}
,
{"name": "colors"}
```

```
,
{"name": "clipboard"}
,
"/",
{"name": "links"}
,
{"name": "insert"}
,
{"name": "paragraph","groups": ["list","indent"]}
,
{"name": "align"}
,
{"name": "undo"}
,
{"name": "cleanup"}
,
{"name": "mode"}
,
{"name": "tools"}
],
"removeButtons":
"Styles,Subscript,Superscript,Anchor,Blockquote,PasteFromWord,Copy,Cut"
}
```

Example 2-2   Option 2: "toolbar"

```
{
"toolbar" = [
{ "name":"basicstyles","items":
["Bold","Italic","Underline","Strike","Subscript","Superscript","-","CopyFo
rmatting","RemoveFormat"] }
,
{ "name":"paragraph","items":
["NumberedList","BulletedList","-","Outdent","Indent","-","Blockquote","Cre
ateDiv","-","JustifyLeft","JustifyCenter","JustifyRight","JustifyBlock","-"
,"BidiLtr","BidiRtl","Language"] }
,
{ "name":"links","items":["Link","Unlink","Anchor"] }
,
{ "name":"insert","items":
["Image","Flash","Table","HorizontalRule","Smiley","SpecialChar","PageBreak
","Iframe"] }
,
"/",
{ "name":"styles","items":["Styles","Format","Font","FontSize"] }
,
{ "name":"colors","items":["TextColor","BGColor"] }
,
{ "name":"tools","items":["Maximize","ShowBlocks"] }
,
{ "name":"about","items":["About"] }
]}
```

Create Localization Policies

You must have the repository administrator role to create localization policies. These policies define if a translation will be required and if so, what the required languages are for assets and any optional languages that might be used.

Localization policies are the translation rules applied to any text assets in a repository. These policies don't apply to digital assets such as images. That content is classified as non-translatable when it's uploaded. But content items can have multiple translated versions associated with the original item, which is considered the *master copy*.

When an item is localized, a copy of the item is made for the language. For example, there may be a blog post about the newest Android tablet that is translated into French and Spanish with the master copy in English. Each version of the blog post exists as a separate entity. It can be edited as needed and can be at a different stage of asset lifecycle than the others. The French version can be in review, for example, while the Spanish version is published. There may be two or three content versions of the post, each of which can be translated and have a different status applied to it.

The simplest way to check the status of a particular translation version is to view the item in the asset repository. See Sort and Filter Assets for details.

Creating a Localization Policy

To create a localization policy:

1. Sign in as a repository administrator in your browser and click **Assets** under Administration in the left navigation menu.

2. Choose **Localization Policies** from the drop-down list and then click **Create**.

3. Enter a name for the policy. Don't use special characters in the name.

4. Enter an optional description for the policy.

5. Choose the required languages for this policy from the drop-down list. To deselect a language, click the X. You can type part of the language name and results are shown, letting you quickly find the language you want to use. Content items created in a repository associated with this localization policy won't be able to be published unless they have translations for all required languages.

6. Choose optional languages for the policy. Content items created in a repository associated with this localization policy don't need to have translations for these optional languages in order to be published.

7. Click **Save** when done.

After a policy is created, it can be used in a publishing channel. See Create and Share Publishing Channels for details.

Create and Share Publishing Channels

Publishing channels can be applied to a repository and then applied to all the assets managed in the repository. And when a site is created, a publishing channel is automatically created using the site name as the channel name.

A publishing channel determines the release rules that are applied to an item in a repository. A channel can be public and available to everyone, or secure and limited. A

repository can use multiple channels. You can select specific channels to use with specific assets in the repository, letting you decide the policies to be applied in individual cases.

You can't delete a channel if it has published assets. You also can't delete a channel that's associated with a site. You have to delete the site in order to delete the channel.

Create Publishing Channels

To create a channel:

1. Sign in as a repository administrator in your browser and click **Assets** under Administration in the left navigation menu.

2. Choose **Publishing Channels** from the drop-down list and then click **Create**.

3. Enter a name for the channel. Don't use special characters in the name.

4. Enter an optional description. It's useful to describe how the channel can be used so others will understand it quickly and easily.

5. Decide if the channel will be public or secure. A public channel is one that can be used by anyone in your organization. A secure channel is limited to people with a specific role.

6. Decide what the publishing policy will be. You can elect to have items published without approval, or restrict publishing to only those items that have been through an approval process.

7. Choose the localization policy to use for the channel.

8. Click **Save** when done.

After the channel is created, a channel ID and a channel token are assigned to the channel. These IDs can be used when creating customized interfaces. To see the IDs, select the channel and choose **Edit** from the menu bar or the right-click menu.

Share Channels

Sharing a channel is like sharing any file or folder. Just select the channel, click **Members**, and choose members and choose the role they can have. You can share with individuals or with groups.

If you assign someone a Manager role, make sure that person also has a site administrator role. That will allow the user to fully manage the repository, including adding other users, publish the site, manage the channels, and doing other administrative tasks.

When you create a site, a publishing channel is automatically created with the site name as its name. You can't edit any of the details of the channel except its description and you can't directly share the channel with others. You'll need to share it by sharing the site.

Users without an administrative role will be able to target assets to a channel without the channel being shared with them. But you must share a channel to a person with a minimum of a contributor role in order for that person to publish or unpublish assets. Even if the person has a manager role in the repository, they must also have a role for the channel in order to use it for publishing.

Create and Manage Taxonomies

A *taxonomy* is a hierarchy of categories, mapped to your business structure, used to organize your assets and to help users find assets by drilling down into the area they're working on.

> **Note:**
>
> Taxonomies are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

You can assign a taxonomy to more than one repository, and you can assign multiple taxonomies to a repository. For example, you could create different taxonomies for each department and for each product or initiative in your business. Then you could apply "Marketing Department" and "Products" taxonomies to your Marketing repository, and apply "Sales Department" and Products" taxonomies to your Sales repository.

When you create a taxonomy, it stars as a *draft*. When the taxonomy is finalized, you must promote it and associate it with at least one repository in order for it to be used. Then users can organize content into the categories. As your business changes, you can update your taxonomies by creating a new draft version. Changes you make in the draft won't affect the repository organization. When the updated structure is approved, you can promote the new taxonomy version for use in your organization, and assets will be recategorized accordingly.

You must have repository administrator privileges to create a taxonomy.

Create a Taxonomy

To create a taxonomy:

1. Sign in as a repository administrator in your browser and click **Assets** under Administration in the left navigation menu.

2. Choose **Taxonomies** from the drop-down list, and then click **Create**.

3. Enter a name for the taxonomy. Don't use special characters in the name.

4. Enter an three-letter abbreviation for the taxonomy. If you don't enter an abbreviation, the first three letters of the taxonomy name will be used.

5. Enter an optional description describing what the taxonomy should be used for.

6. Build your taxonomy by adding categories.

   - To add a top-level category, click **Add Category**.

   - To add a category at the same level as the selected category, click **Add Sibling** or ⊞.

   - To add a category under the selected category, click **Add Child** or ⊞.

   - To reorganize a category, drag it to a new location; select it, and click **Indent** or **Outdent**; or select it, click **Move**, then select the category you want to move it into.

- To rename a category, select it, and change the name in the Category Properties pane, or click **Rename** or ✎ .

- To delete a category, select it, and click **Delete** or ✕

- To view the properties for the taxonomy or category, click ⋮ , then, in the drop-down menu, select the **Taxonomy Properties** or **Category Properties**.

7. When you're done, click **Close**.

After creating your taxonomy, you must promote it and associate it with at least one repository in order for it to be used.

Promote a Taxonomy

To promote a taxonomy:

1. On the Taxonomies page, select the taxonomy you want to promote, and then click **Promote**.

2. Confirm your action, and then click **Promote**.

To view promoted taxonomies, in the status drop-down list, select **Promoted**.

After promoting your taxonomy for the first time, you must associate it with at least one repository in order for it to be used. See Create and Share Asset Repositories. Then users can categorize assets in the repository. See Assign Asset Categories.

Edit a Taxonomy

To edit a taxonomy:

1. On the Taxonomies page, select the taxonomy you want to edit, and then click **Edit**.

2. Edit the categories and hierarchy as needed, and then click **Close**.

3. When you've completed your taxonomy updates, promote the new version.

Delete a Taxonomy

To delete a taxonomy, on the Taxonomies page, select the taxonomy you want to delete, and then click **Delete**.

Create and Share Asset Repositories

You must have repository administrator privileges to create an asset repository. After creating a repository, it must be shared with other people in order for it to be used.

Repository Creation Overview

Asset repositories are a way for you to manage digital assets in a group. All the content needed for a campaign, for example, could be stored in one repository. You could designate specific localization policies, channels, and content types to be used with that repository and those features will then be applied to all the content in the repository.

Here are few tips to keep in mind as you create repositories:

- Try to use meaningful names for the repository and add a clear description so users will know what content is stored there. After you share a repository, it appears in a user's asset list. Make sure a user understands where it's used.

- Don't use special characters when naming your repository.

- You can use channels, content types, and taxonomies created by other administrative users. Channels and content types don't have to explicitly shared with you if you have an administrative role.

- Even if the repository is shared, the individual features within it are not. Non-administrative users will be able to *see* all associated content types in the filter pane on the asset page, and they can view and edit items of those types without explicit sharing. However, in order to create a new content item, you must share the content type with users. In the same way, non-administrative users will be able to see all channels associated with a repository and they can target assets to those channels. But the channel must be shared with a user with a minimum of contributor rights in order to publish or unpublish assets to the channel.

Create a Repository

To create a repository:

1. Sign in as a repository administrator in your browser and click **Assets** under Administration in the left navigation menu.

2. Choose **Repositories** from the drop-down list and then click **Create**.

3. Enter a name for the repository. Don't use special characters in the name.

4. Enter an optional description describing where the repository will be used.

5. Choose the taxonomies to be used with the repository. Only promoted taxonomies are available to be selected.

> **Note:**
>
> Taxonomies are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

6. Choose the content types to be used with the repository. Content types must be shared with you to be used. If someone else created a content type that you want to associate with this repository, make sure it's shared with you so you can use it.

7. Choose the publishing channels to be used. If you create a repository and use it with a site, the site channel will be added to the list of channels used in the repository.

8. Choose the default language for the repository.

9. If a channel was chosen, the required languages for that channel are shown. You can't edit the channel languages, but you can optionally add additional languages. The system does not automatically translate an item when a language is chosen. You must either export assets, translate the strings, and import the translated strings; or add a translation to a particular content item.

10. Click **Save** when done.

Share a Repository

Sharing a repository is like sharing any file or folder. Just select the repository, click **Members**, and choose members to add and choose the role they can have. You can share with individuals or with groups.

If you assign someone a Manager role, make sure that person also has a content administrator or site administrator role. That will allow the user to fully manage the repository, including adding other users, managing the channels, and doing other administrative tasks.

Even if the repository is shared, the individual features within it are not. Non-administrative users will be able to *see* all associated content types in the filter pane on the asset page, and they can view and edit items of those types without explicit sharing. However, in order to create a new content item, you must share the content type with users. In the same way, non-administrative users will be able to see all channels associated with a repository and they can target assets to those channels. But the channel must be shared with a user with a minimum of contributor rights in order to publish or unpublish assets to the channel. Non-administrators will be able to categorize assets based on the taxonomies associated with a repository.

Create and Share Collections

Collections are a way to group content items, digital assets, and documents for use on a website, external application or for marketing campaigns.

Understand Collections

Collections are specific to individual repositories and can be used to manage a subset of items in a repository. All the items in the collection will adhere to the publishing channel that's assigned to the collection.

When you access the collection list by clicking **Collection** in the asset view, only those collections you can manage are shown. You can create a collection if you have a contributor role in the repository.

All users can view the complete collection list when filtering assets. But you must have a contributor role for the collection in order to add assets to it.

When you create a website, you specify a repository for use with that website. A collection is created when you create the website and it's associated with the repository used when you created the site. When you add assets to a site-created collection, those assets are available for use in that site.

You can also create a collection that isn't associated with a site. For example, you may have a repository with content pertaining to sports cars. You could use a collection to group together all digital assets for American sports cars, one for French sports cars, and one for Italian sports cars. The assets for all sports cars will be managed in the repository, but you can manage a subset (American sports cars) separately. Assets can be put into the appropriate collection, making it easy to quickly sort through and find exactly what you want.

Create or Edit a Collection

To create a collection not associated with a site:

1. To create a new collection, click **Assets** in the left navigation panel. If you're signed in as an administrator, do not click **Assets** in the Administration area.

2. The Asset view opens. Choose the repository you want to use then click **Collections**.

3. Click **Create**.

4. Choose the publishing channels to associate with the collection.

5. Click **Done** when finished.

To change a collection's name or channels, select the collection and click **Properties** from the menu bar or right-click menu. You can edit the details about the collection on the property page.

Share a Collection

You don't need to share a collection in order for others to use it. Other users of the repository will be able to see the collection and use it for filtering assets, even if they can't add or remove assets. All users who are members of the repository have a viewer role by default.

Use sharing to add people with the contributor or manager role. Sharing is done the same way you share folders: select the collection, click **Members**, and add members to the collection. You can't share with groups. If you share a website collection with someone, that person is automatically added to the website with a Downloader role. You can change their role later if needed. And if someone shares a website with you, then you'll see the site's collection.

3
Work with Digital Assets

You can easily group digital content for a project into one manageable location so you have everything you need at your fingertips. Assets can include content items or visual assets, such as photographs or images. Digital assets are only available to enterprise users.

- Take a quick tour about using digital assets (English only)
- Quick Overview of the Assets Page
- Understand Asset Management
- Add and Remove Assets
- View and Manage Digital Assets
- Edit an Image
- Manage Image Renditions
- Assign Asset Categories
- Tag Assets
- Sort and Filter Assets
- Change the Status of Assets
- Publish Assets
- Use the Adobe Creative Cloud Extension

Quick Overview of the Assets Page

Your Assets view is where you add, remove, and publish all the digital assets and content items you need for projects. Let's take a look at what's on that page.
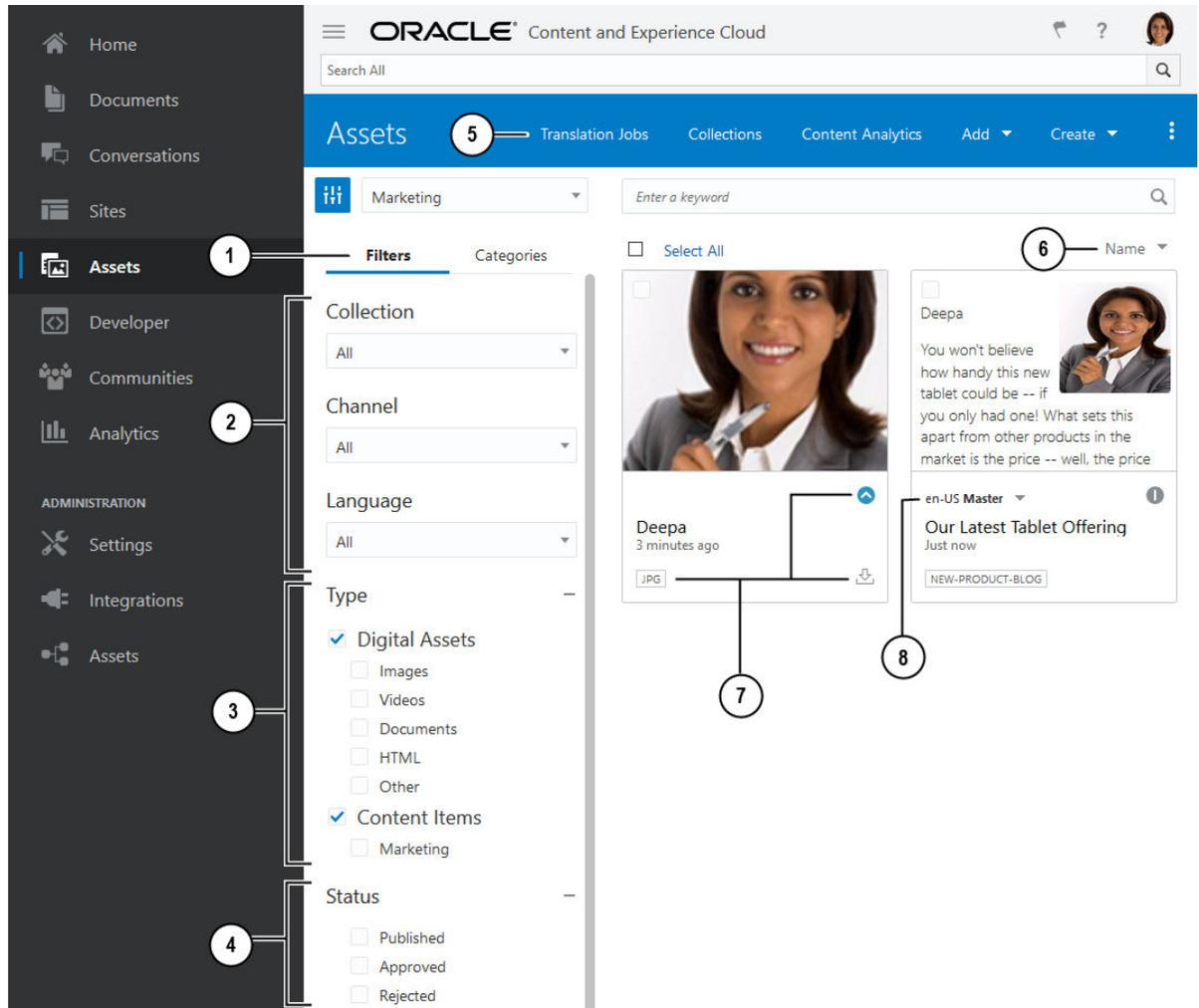
To get started, click **Assets** in the left navigation menu. Click the ![icon] to open the filter panel if it's closed. Select the repository to use from the drop-down list next to the filter icon.

- You can filter by collection, channel, language, type, and status using the options on the Filters tab **(1)**, or you can filter by categories on the Category tab.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

- You can narrow what you see by collections, channels, or by languages **(2)**. If you choose a specific collection, for example, you will see only those content items and digital assets that are in that collection. If you leave these options set to All, you'll see all the assets in the repository you chose to use. If a content item is translated into multiple languages, one item is considered the "master" and the other translated versions are considered secondary. When you filter for a specific language, an asset may be returned in your results that doesn't appear to be in that language. However, there may be a secondary version in that language.

- You can also limit what you see by the type of asset **(3)**. You can choose specific kinds of digital assets, such as images or documents. Or you can filter by specific content items which are based on the content types listed. This helps you quickly find individual files that match the criteria you're using.

- You can also filter according to the status of an asset **(4)**. For example, you may need to find only the published version of some of your assets. The status is shown in the lower right area of the asset, indicated by the colored circle. Here's a handy table showing what the circles mean.

  - Published

  - Approved

  - Rejected

  - Draft

  - Translated

  - In Review

- The menu at the top of the page **(5)** lists the actions you can take. You can view translation jobs. You can go to the collections view, which lists all the collections for the repository. From there, you can open each collection and see the assets that are being managed in that collection. You can view the analytics for the open repository. You can add files into the repository from your computer or files that are already stored in your Documents cloud account or, if your administrator has enabled cloud storage integration, from a third-party cloud storage provider. You can also create a content item by clicking **Create** and then selecting a content type to use from the list. To view the Categories panel, click ⋮ .

- You can list the assets in your view by name or by the last date they were updated **(6)**. You can also toggle between smaller tiles and larger tiles, letting you see more or less assets per page.

- Asset details are shown on each tile **(7)**. This shows what kind of asset it is (.jpg, .png and so on), a download action you can use, and the status of the asset.

- If the asset is a content item, it might be translated. A list of translated versions is shown when you select the drop-down arrow next to the translation notation on the content item tile **(8)**. To view all the languages associated with an item, select the item and click **Expand**. A new screen opens, showing you the translated versions of that asset.

Understand Asset Management

Assets are those images and content items that can be used in websites, in publications, or in other marketing and media areas. Digital asset management is a way to group and manage all the assets that are used for one purpose, like in a website or for a particular project.

You add the assets to a repository, where publishing policies and localization policies dictate how the asset is managed.

There are several ways to make your assets easier to find. You can tag assets by adding a keyword when you upload the asset. This enables users to search for assets based on the keyword. You can also add assets to collections, grouping associated assets so users can see all the assets used in a site, used by a department, or any other grouping that fits your needs.

You can upload custom renditions of your images to suit the channel they're published to (mobile, tablet, web, etc.).When you add an image to a repository, large, medium, small, and thumbnail renditions of the image are automatically generated by Oracle Content and Experience Cloud. You can use these renditions or create your own to suit your needs.

Content items are also assets and they can work with digital assets such as images. When you create a content item that has a media field, you can select a digital asset for that field. You can associate a content item with a collection and with any of the translation or publishing policies you've created.

After a content item has been created, it can be translated if the policies associated with that item allow it. For example, if you create a content item but include it in a repository that has been created with channels that don't allow translation, you won't be able to translate it. Visual digital assets, such as images, are by default not translatable. It's important to plan ahead and include the correct policies with the right repositories.

Add and Remove Assets

Adding and removing items for asset management is done in much the same way you do for files.

Add Assets

You can upload content from your local computer, from the files in your Oracle Content and Experience Cloud account, or, from other sources if enabled by your administrator.

There are several ways to make your asset easier to find. All assets are managed in a particular repository, which you select when you add the asset. You can also tag the asset by adding a keyword. This enables users to search for asset based on the keyword. Additionally, you can add the asset to a collection, grouping it with associated assets. Collections make it easy for users to see all the assets used in a site, used by a department, or any other grouping that fits your needs.

You can also choose a channel for the asset. This is a *targeted channel*, which means the asset will use those policies after it's been uploaded.

You can upload custom renditions of your images to suit the channel they're published to (mobile, tablet, web, etc.).When you add an image to a repository, large, medium, small, and thumbnail renditions of the image are automatically generated byOracle Content and Experience Cloud. You can use these renditions or create your own to suit your needs.

You can add assets in any of the following ways:

• **Add directly to Assets.**

  Click **Assets**. If you've been using a repository, it's used by default. If you want to use a different repository, select it from the drop-down list. If you want to add the

asset to a particular collection, select it in the Collections drop-down list. Click **Add** and then select an option:

– Add from Documents - Select an asset from your Oracle Content and Experience Cloud Documents. A copy of the asset is made. You can change or delete the original item in Documents and not affect the one that's stored in the repository.

– Add from this computer - Select an asset from your computer.

– If your administrator has integrated other third-party cloud storage providers, you'll see options to import from those providers. The first time you import from a new provider, you'll need to sign in. Then you'll be able to select an asset from your account.

   If you want to later revoke access to a provider, click **Add**, and then select **Manage Sources**. You'll see a list of all your saved source access. Click **Revoke** next to the provider you want to disconnect from.

• **Drag and drop content from your desktop computer.**

   Find content from your local files and drag it into either a collection or directly into the Assets view.

• **Choose content from your Documents list.**

   Select a file in your Documents list and choose **Add to Assets**.

> **Note:**
>
> You must be a member of a repository to add an item to it. If you want to use a repository but don't see it in the list, you may not be a member of that repository.

Remove Items

> **Note:**
>
> It's important to understand that when an asset is removed, it is permanently removed. Assets are not moved to Trash where they can be recovered later. When an asset or a content item is deleted, it is permanently removed.

Click **Assets** and select the item you want to delete. Click **Delete**. If an item is published, you can't delete it (because it's in use).

Here are some things to consider when you remove assets:

• There is no multi-select option when deleting assets. You must remove each asset individually.

• You can't remove published assets. The asset must first be unpublished and then it can be removed. If you select a published asset, the delete option is not available.

• If you delete a master in a set of translated content items, all of the translations are also deleted.

- You can't delete an asset that's being used in a content item. If an image is referenced in a content item, for example, you can't delete that image.

View and Manage Digital Assets

You can view, edit, and manage your digital assets in many ways on the Assets page and while viewing the digital asset.

In the header on the Assets page, you can perform the following actions on digital assets:

- To view and create collections, click **Collections**. See Create and Share Collections.

- To view analytics for the current repository, click **Content Analytics**. See View the Sites & Channels Analytics Dashboard.

- To add a digital asset, click **Add**. See Add and Remove Assets.

- To view the categories the selected assets are assigned to, click ⋮ . See Assign Asset Categories.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

- To search, filter, and sort assets, use the tools on the left of the Assets page and the search box at the top. See Sort and Filter Assets.

On the Assets page, you can perform the following actions on a digital asset by selecting an asset and clicking an option in the toolbar, or by right-clicking an asset and selecting an option:

- To open the image, click **View**.

- If the image requires review, click **Submit for Review**. A repository administrator can then approve or reject the image. The submission status is shown in the lower right area of the asset— ⊖ In Review, ◯ Approved, or ⊗ Rejected.

- To publish the image and make it available for use in a site, click **Publish**. See Publish Assets.

- To make images easier to find, you can use categories, collections, and tags.

  - Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need. To assign categories to the image, click **Categories**. See Assign Asset Categories.

    > **Note:**
    >
    > Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

- Collections are a way to group related assets for a specific business need such as a marketing campaign. A new collection is also created automatically for each site. To change the collections the image is associated with, click **Collections**. See Create and Share Collections.

- Tags, like keywords, are terms that a user might search for. For example, you might have a document about an upcoming conference. You could tag the document with "conference", "event", "webinar", "breakouts", and other similar terms. To add or edit the tags for the image, click **Edit Tags**. See Tag Assets.

- To change the publishing channels the image is targeted to, click **Targeted Channels**. See Create and Share Publishing Channels.

- To download the image to your computer, click **Download**.

- To add a new version of the image, click **Upload New Version**.

- To remove the image from the repository, click **Delete**.

- To view the image properties, click **Properties**. The properties include read-only information such as when the item was created and last updated, the associated channels, and the associated collections.

While viewing a digital asset, you can perform the following actions:

- To crop, rotate, or flip an image, or change the format, background color, or image quality, click **Edit**. See Edit an Image.

- If the image has been submitted for review, a repository administrator can approve or reject the image.

- To download the image to your computer, click **Download**.

- To view the image in full screen mode, click **Full Screen**.

- To add a new version of the image, click **Upload New Version**.

- To change the magnification of the image, use the zoom controls.

- To create or participate in a conversation associated with the image, click ⋮ , then, in the drop-down menu, select **Conversation**.

- To view and manage renditions for an image, click ⋮ , then, in the drop-down menu, select **Renditions**. See Manage Image Renditions

- To view the API information for the image, click ⋮ , then, in the drop-down menu, select **API Information**. The API information includes the API ID, the delivery URL (after the content item is published), the creation date, and the date it was last updated.

- To view the categories the image is assigned to, click ⋮ , then, in the drop-down menu, select **Categories**. See Assign Asset Categories.

> ✎ **Note:**
>
> Categories are available only in Oracle Cloud Infrastructure, not Oracle Cloud Infrastructure Classic.

Edit an Image

You can crop, rotate, or flip an image, or change the format, background color, or image quality. Then you can save the new image as a new rendition or a completely new asset.

You can't edit a published image. You must create a new version of the image if you want to edit it.

If there is more than one version of an image, when viewing the image, you can switch between the latest draft version and the last published version using the drop-down menu next to the image name.

To edit an image:

1. Open the image, and then click **Edit**.

2. Edit the image with any of the following actions:

   - To crop the image, click 🖻 **Crop**. Select one of the predefined image ratios in the cropping toolbar, or drag the cropping handles on the image as desired. When you're satisfied, in the cropping toolbar, click **Crop**.

   - To rotate the image, click ⟳ **Rotate**. In the rotation toolbar, enter a custom rotation degree or use the buttons to rotate the image left or right.

   - To flip the image, click ⬌ **Flip**, and select whether to flip the image horizontally or vertically.

   - To change the image format, click ⚙ **Options**, then select a new format from the **Format** drop-down list.

   - To change the background color, click ⚙ **Options**, then select an option from the **Background Color** drop-down menu.

   - To change the image quality, click ⚙ **Options**, then enter the new dpi in the **Quality** box.

   - To undo or redo your change, click ↰ or ↱ . To remove all changes you made, click **Reset**.

   - To change the magnification of the image, use the zoom controls (⊖ ――◯―― ⊕).

3. To save your changes, click **Save**, then select whether you want to save as a new rendition or as an entirely new asset.

Manage Image Renditions

You can upload custom renditions of your images to suit the channel they're published to (mobile, tablet, web, etc.).

When you add an image to a repository, large, medium, small, and thumbnail renditions of the image are automatically generated by Oracle Content and Experience Cloud. You can use these renditions or create your own to suit your needs.

> **Note:**
>
> Images aren't upsized, only downsized, to create the automatically generated renditions. For example, if you add an image that is 100px by 100px, which is smaller than the defined thumbnail, all the automatically generated renditions will be 100px by 100px.

To view and manage renditions for an image, open the image, click ⋮ , then, in the drop-down menu, select **Renditions**. You can use the options on this pane to:

• View a particular rendition.

• Download a rendition.

• Upload a new version of the original image.

• Add a rendition. When you add a rendition, you can edit its name to specify the purpose of the rendition.

Assign Asset Categories

You can view, assign, and remove asset categories to organize your assets.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

To view and manage categories for an asset:

1. Select one or more assets, and then click **Categories**, or click ⋮ , then, in the drop-down menu, select **Categories**.
   You see the categories assigned to the selected assets. The taxonomy abbreviation precedes the category name.

2. Add or remove categories as necessary.

   • To add a category, click **Add**. If more than one taxonomy is assigned to the repository, you can change the taxonomy selection in the drop-down list.

Expand the taxonomy nodes to find the category you want to add, then select the category, and click **Add**.

- To remove a category, select it in the list, and then click **Remove**.

- If you selected more than one asset and one of the assets is assigned to a category you want to assign to all the selected assets, select the category in the list, and then click **Assign to All**.

If you don't see the categories you want to assign to the asset, talk to your repository administrator to make sure the appropriate taxonomy is assigned to repository in which this asset is stored.

Tag Assets

Tagging is done by adding keywords that let you find the item quickly.

You can add tags to files when you upload them or tag them after they're added, either in the asset area or in a collection. You can also tag content items after they're created. You can search for items by using a tag as a search term, helping you find files quickly.

Here are things to consider when you're tagging assets:

- Add as many tags you think you'll need. Tags can describe the item, the place, the year, the subject matter or whatever you need to identify the object. You decide what tags you need.

- When adding tags, press **Enter** after each tag. Click **Done** when you're finished adding all your tags.

- Tags aren't case-sensitive. "Lake" is the same as "lake" when you're tagging.

- You can use special characters, such as asterisk (*) and parentheses (), but avoid doing so. It can make searching for the tagged object difficult.

> **✎ Note:**
>
> If you know you want to add more tags to ones that are already done, open your assets and type the tag in the keyword box. Click **Find**. The files with that existing tag are shown. You can select them all and add a new tag using the instructions detailed here.

Add Tags When Uploading

1. Click or tap **Assets** in the navigation panel.

2. Click **Upload** and select the objects to add. Assets are added by default to the selected repository. Choose a different repository if needed.

3. Add the tags for the items or edit the existing tags. Press **Enter** after each tag. You can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.

4. Click or tap **Done** when you're finished adding tags.

Add Tags to Existing Items

You can add or edit tags to uploaded items in the asset list or in a collection. If you want to edit tags in a collection, just select the collection first.

1. Find the assets you want to edit, either in a collection or in the asset list.

2. Select the items. Click **Edit Tags**.

3. Edit the current tag or add additional tags.

4. Click or tap **Done** when you're finished.

Sort and Filter Assets

You can search for any assets the same way you search for other files or folders.

You can search for assets in the search box in the banner. Enter the asset name if you know it. Or you can enter a tag associated with the asset. All assets with that tag are returned.

You can also search from within a collection or within the asset list. Open a collection or your asset list and enter a tag in the search bar to find all assets with that tag.

To filter what you see, click ▼ in your asset list to open the filter menu.

You can filter items by collection, channel, language, type or by status. When you filter by type, you can choose to view only images, documents, video, or HTML files.

If you choose "All" for Collection, Channel, and Language and uncheck all other boxes, you can view everything.

When you filter items by status, you can limit your view to items that have properties determined by the repository where they're managed. For example, a publishing policy may state that the assets can only be published if they've been approved. After those policies have been applied to the assets in the collection, you can then filter to see the following statuses:

• Published: see assets that are marked as published and available for use.

• Approved: see assets that are approved according to the policies in the collection.

• Rejected: see assets that weren't approved according to the policies.

• Draft: see assets that are still in progress.

• In Review: see assets that are awaiting review for approval or rejection.

Understand Translation and Filtering

It's important to note that when you filter by language, you may see results you don't expect. If an asset is translated into multiple languages, one asset is considered the "master" and the other translated versions are considered secondary. When you filter for a specific language, an asset may be returned in your results that doesn't appear to be in that language. However, there may be a secondary version in that language.

To view all the languages associated with an item, select the item and click **Expand**. A new screen opens, showing you the translated versions of that asset.

Change the Status of Assets

All digital assets are considered to be drafts until they're specifically changed to a different status, such as "approved" or "in review."

Here's what you need to know about changing the status of an asset:

- The status of an asset can only be changed when you view the asset.

- Keep in mind that only managers or owners of a collection can change the status of an item. If a collection was shared with you and you don't have a Manager role, you won't be able to change the status. Also, you can't unpublish or delete objects that are being used. It must be removed from the website where it's used before its status can be changed.

- If you upload a new version of a digital asset, it's automatically labeled as Draft.

- In order to publish something, you must have at least a Contributor role on the channel where the asset is managed.

An item's status is designated by its icon:

- Published

- Approved

- Rejected

- Draft

- Translated

- In Review

To alter the status of an asset **in your browser**:

1. Click **Assets**.

2. Select the asset.

3. Choose the new status from the menu bar or the right-click menu.

If the item has translated versions, select the item and then click **Expand**. You can only change the status of a translated version if it's been approved. If the item hasn't been approved, a status change isn't shown as a menu option.

Publish Assets

When you publish assets, you can select the channels used for publishing and see immediately if the asset adheres to the approval and localization policies that were set for that channel.

Assets can be pretargeted to a particular channel, making it easy for you to publish them using that channel, or you can select an alternative channel to use for the asset.

If you want to publish a translated content item, make sure the translated version has been set as translated before trying to publish it. Also be aware of the approval

policies for the repository where you're working. Some assets do not need to be approved before publishing, and some must be approved.

To publish an asset:

1. Select the assets you want to publish.

2. Click **Publish**.

   Oracle Content and Experience Cloud compares the assets to the approval and localization policies of the targeted channel. The validation results list the status of the selected assets, any associated translations, and any dependent assets. You can filter the results by channel or by status.

3. If you need to select a different channel click **Selected**, select one or more channels, and then click **Validate**.

4. To remove an asset from publishing, click the X next to the asset.

5. When all assets show a status of "Ready", click **Publish** to publish the assets.

Publishing Tips

Here are some things to keep in mind about publishing assets:

- Some channels may require assets to be approved before they can be published.

- If you're publishing a content item and it's been translated, the version you're publishing must be set as translated before it can be published. Select the translated version, and click **Set as Translated** to show that the version has been approved.

- If you select multiple assets to publish, all the channels the assets are targeted to will be shown. For example, if you have two assets that are targeted for publishing to Channel A and one asset targeted to Channel B, then "Channel A (2)" and "Channel B (1)" appears in the Channel list, indicating the number of assets targeted to each channel.

- You can't publish assets until they have been validated against the policies of the channels to which they'll be published. After validating, you see results showing you which assets follow the policies and which do not.

Use the Adobe Creative Cloud Extension

You can use the assets stored in Oracle Content and Experience Cloud in your Adobe Creative Cloud applications, such as Photoshop.

The extension is available for Adobe Creative Cloud applications (Photoshop, Illustrator, InDesign, Premiere Pro, After Effects, and Audition) 2018 and higher as part of the desktop app. All you need to do is install the desktop app, configure at least one Oracle Content and Experience Cloud account, then access the extension in your Adobe Creative Cloud application, sign in, and configure it to work the way you want.

Before using the extension, make sure you have access to the repositories where the assets you need are stored. A repository manager must share a repository with you in order for you to use the assets there.

Depending on the Adobe application you use, you'll access the extension through different menus, and you'll have access to different features:

- **Photoshop:** Link or embed image assets. Drag assets from the Oracle Content and Experience Cloud panel to the canvas. Upload assets by dragging images from Windows File Explorer, Mac Finder, or the canvas to the Oracle Content and Experience Cloud panel.

- **Illustrator:** Link or embed image assets. Drag assets from the Oracle Content and Experience Cloud panel to the canvas. Upload assets by dragging images from Windows File Explorer, Mac Finder, or the canvas to the Oracle Content and Experience Cloud panel.

- **InDesign:** Link or embed image assets. Drag assets from the Oracle Content and Experience Cloud panel to the canvas. Upload assets by dragging images from Windows File Explorer, Mac Finder, or the canvas to the Oracle Content and Experience Cloud panel.

- **Premiere Pro:** Link image, video, and audio assets. Drag assets from the Oracle Content and Experience Cloud panel to the Projects panel. Upload assets by dragging images from Windows File Explorer or Mac Finder to the Oracle Content and Experience Cloud panel. Uploading assets from the Projects panel isn't available due to API limitations in Premiere Pro.

- **After Effects:** Link image, video, and audio assets. Drag assets from the Oracle Content and Experience Cloud panel to the Projects panel. Upload assets by dragging images from Windows File Explorer, Mac Finder, or the Projects panel to the Oracle Content and Experience Cloud panel.

- **Audition:** Embed video and audio assets. Drag assets from the Oracle Content and Experience Cloud panel to the Editor or Files panels. Upload assets by dragging images from Windows File Explorer, Mac Finder, or the Editor or Files panels to the Oracle Content and Experience Cloud panel. The extension options (Preferences, Help, About) are available via the command bar.

Using the Extension

Before you use the extension for the first time, you need to use the desktop app to connect to Oracle Content and Experience Cloud. The extension gets the account information from the desktop app.

1. Open the **Extensions** menu in the Adobe application. This is a submenu accessed from another menu, such as Window. The location of the menu varies, depending on the application you're using.

2. Select **Oracle Content and Experience** on the extension list.

3. Sign in with your account name and password. If you have multiple accounts, select the one you want to use.

   > **Note:**
   >
   > If you see a message that no repositories are found, it means that either repositories have not yet been configured or no repositories have been shared with you under the account name you used for sign-in.

4. You can work with **Assets** view, **Links** view, or **Renditions** view. In Assets view, you can browse or search for assets, and place them into the Adobe Creative Cloud application. In Links view, you can see a list of assets that are already linked to the current project. In Renditions view, you can see all system and custom renditions associated with an asset.

Assets view

- Select a repository to use from the drop-down menu on the right.

- You can view all assets or select a collection from the drop-down list.

- Click ⍓ to filter assets by channel, type of asset, or asset status.

- Right-click an asset to open a menu where you can choose one of these options:

  – Link the asset to the current project.

  – Embed the asset, which copies the asset to the current project. This option isn't available for Premiere Pro or After Effects.

  – Open Renditions view, to see all the system and custom renditions of the asset.

  – Upload a new version of the asset from selected layer

  – Upload a new version of the asset from selected image

  – View the asset in the web, which opens the asset in a browser.

  – Display the properties of the asset.

  – Delete the asset.

  You can also link or embed an asset by dragging and dropping the asset or clicking the appropriate icon at the bottom of the asset view page.

Links view (not available in Audition)

- Displays those assets already linked to the project.

- If an asset has a local change, an asterisk is appended to the end of the version number.

- If a new version is available in the repository, a notation is made after the version number.

- Right-click an asset to perform the following actions:

  – Download the asset.

  – Upload a new version of the asset.

  – View details about the asset.

Renditions view

To open the renditions view, in asset view, double-click an asset. You see all system and custom renditions associated with the asset.

For system renditions, right-click a rendition to perform the following actions:

- Copy the rendition to create a customized version of the rendition.

- Link the rendition to the current project.

For custom renditions, right-click a rendition to perform the following actions:

- Link or embed the rendition to the current project.

- Replace the rendition with the selected layer.

- Replace the rendition with the selected image.

- Delete the rendition.

Customizing the Extension

You can change how assets are filtered and other usage details. Click ☰ , and then select **Preferences**. You can perform the following tasks:

- **Change the account used**—Select **Accounts**, and then select a different account from the list.

- **Adjust the filter settings**—The extension works with the basic types of images, video, and audio with a predefined list of file extensions for those types. You can customize the basic types by changing the name of the filter or add additional extensions in the Extensions area of the dialog.
  To add a new filter, enter the filter name and the identifier, choose the type for the filter, and provide the file extensions used with the filter. For example, to add a filter for raw images, you could name the filter *Camera Raw*, enter the identifier as *image_raw*, set the type to *image*, and set the extensions to *.crw* and *.nef*.

  Click **Save** when you're done customizing the filters.

- **Specify how you want changes to assets to be handled**—You can automatically upload any changes to assets or you can handle that manually. For example, if you have an asset linked to a current project and you make local changes to that asset, when the asset is saved, it can be automatically updated in the project.

4

Use Structured Content

Structured content includes content types and content items. Content items can be translated into multiple versions for multiple languages.

Understand Structured Content

"Structured content" is a term used to describe content that exists separately from any file or layout.

Overview of Structured Content

A *content type* is a framework for information that can be used in a website or for other projects. A content type can have different layouts associated with it so that the information entered using that content type can be formatted in a variety of ways. You can think of a content type like a form, where information is entered and saved. Then that information can be used later with different layouts or formats. You can only create a content type if you have content administrator privileges.

A content type is created by a user with the content administrator role, and then has to be shared with someone with the enterprise user role in order to use it to create a new content item. If someone created content types but you don't see them in the listing when you try to create a content item, check to make sure the content types were shared with you. See Learn About User Roles for details about roles and responsibilities.

A content type might require text, a date, an image, or a variety of numerical fields. It all depends on what's needed. There may be several different layouts associated with a content type, so depending on where your item is needed, it might appear with a large picture and small typeface, or a small picture with wraparound text. The location and contact information may be omitted in one place or included in another. The

content itself won't change, but the layout can change without affecting the actual content that you entered.

For example, perhaps there's a content type called Employee Information. It might have fields for a job title, geographical location, a brief biography, and a picture. When you use that content type to create a *content item*, you choose a collection where the content item will be managed. Then you enter specific information: your job title, location, some information about yourself, and you'll choose a picture from your digital asset collection to use with the content item.

The content item becomes a part of the *collection*. There might be photos, videos, or documents in the collection, all of which can be used on a website, or in a brochure, or wherever it might be needed. A collection is a way to manage all the things you need for one project in one place.

Use Structured Content

Depending on your role in the organization, you may not actually put structured content to use. You may just create content items or add digital assets that are needed. See Learn About User Roles for information about roles and permissions.

Here's a broad overview of how structured content and digital assets can be created and used. In some organizations, one step may occur before or after another.

- Templates and layouts for a website and content types are designed and deployed. This is usually handled by an IT designer with content administrator or site administrator privileges. Often those roles are given to one person, but some organizations may have different people in those roles.

- **Collections (1)** are created to manage the website elements. When a website is created a collection is automatically created, making it easy to manage all the content for the site. Or users can create independent collections to manage their digital assets.

- A person with a content administrator role designs the **content types (2)**.

- The content administrator must share the collection and the content types with users, then users can upload assets and create **content items (3)**.

- Contributors add the content items and upload the **digital assets (4)** for the website or project. When a content item is created, it's assigned to a collection so it can be managed with the collection's policies.

- A content type can have different **content layouts (5)** associated with it, letting you display the content in different ways.

- The IT designer or site administrator adds the digital assets and content items to the website or the project. On a website, the items appear as part of the content available to use on the site.
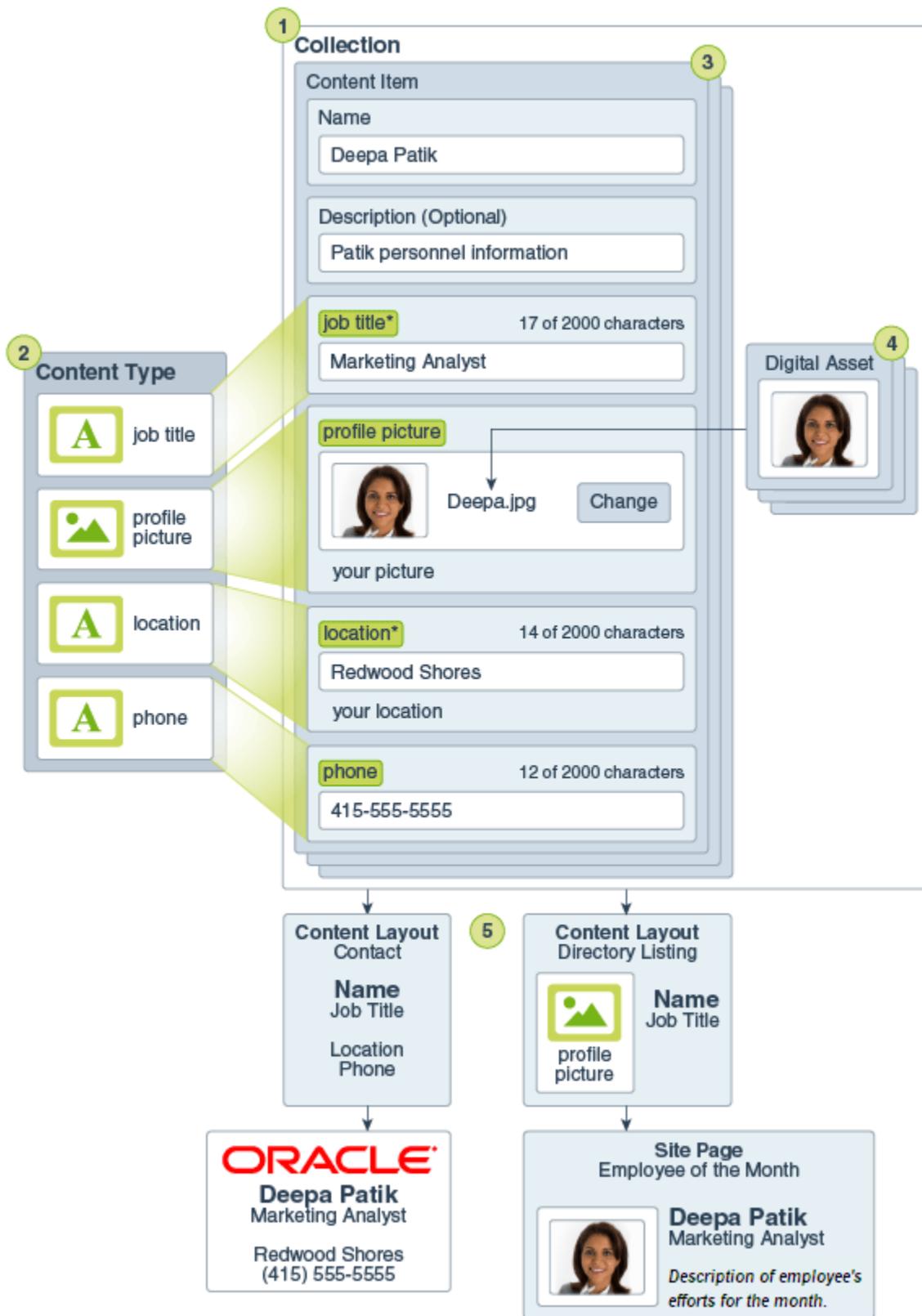
Create Content Items

Content items are created using a content type as a form or template.

To create a content item:

1. Click **Assets** in the navigation panel in your browser.

2. Click **Create** and then select **Create new content item**. If you've created content items before, the last 5 types you used are shown. Otherwise, select the content type you want to use from those shown.

> **✎ Note:**
>
> Content types must be shared with you before you can use them. If you don't see a content type you expect to see, contact the person managing content types to see if it was shared with you.

3. Enter a name and an optional description for the content item.

4. (optional) Choose the collections associated with the item.

5. Choose the languages used for translations for the item. The available languages are set by the repository where the content item is managed. You can also elect to make the item non-translatable.

6. Choose the channels where this item may be used. The available channels are those that were defined with the repository where the content item is managed.

7. The Create Content Item screen is shown with the fields needed for that content type. You can edit the name and the description you just used if needed.

8. Enter information into the necessary fields. If media is required, click the **Select** button. All digital assets are shown. Choose one for use with the content item and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the content item.

To see how the content will look with the different layouts associated with the content type, click **View**. By default, the content is set to fit the browser window. You can select other layout options from the drop-down menu to see how the item will look on different devices and with different sizes. You can also create your own device size.

Alternatively, you can view the ruler by clicking �. Click one of the intervals under the ruler to see how the item appears at different sizes. When you select a mobile device size you can also select ▢ to see how the item appears on a mobile device depending on orientation.

When you're satisfied with the content you created, click **Save** then **Close** to exit the Create Content Item screen.

After creating your content item, you might want to add tags to it or translate it. See View and Manage Content Items or Localize Content Items.

View and Manage Content Items

You can see how a content item content will look with different layouts, add tags, manage translations, and perform other actions on content items.

You can see all the content items in the repositories you have access to on the **Assets** page. See Quick Overview of the Assets Page.

In the header on the Assets page, you can perform the following actions on content items:

- If you've exported assets for translation, you can view the associated jobs by clicking **Translation Jobs**. See Manage Asset Translation Jobs.

- To view and create collections, click **Collections**. See Create and Share Collections.

- To view analytics for the current repository, click **Content Analytics**. See View the Sites & Channels Analytics Dashboard.

- To create a content item, click **Create**. See Create Content Items.

- To view the categories the selected assets are assigned to, click ⋮ . See Assign Asset Categories.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

- To search, filter, and sort assets, use the tools on the left of the Assets page and the search box at the top. See Sort and Filter Assets.

On the Assets page, you can perform the following actions on a content item by selecting an asset and clicking an option in the toolbar, or by right-clicking an asset and selecting an option:

- To see how the content will look with the different layouts associated with the content type, click **View**.

- To edit a content item, click **Edit**.

- To see all the translated versions of a content item, click **Expand**.

- To get a content item reviewed, click **Submit for Review**. A repository administrator can then approve or reject the image. The submission status is shown in the lower right area of the asset— 🟡 In Review, 🟢 Approved, or ❌ Rejected.

- To publish a content item, click **Publish**. See Publish Assets.

- To make content items easier to find, you can use categories, collections, and tags.

  – Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need. To assign

categories to the content item, click **Categories**. See Assign Asset Categories.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

– Collections are a way to group related assets for a specific business need such as a marketing campaign. A new collection is also created automatically for each site. To change the collections the content item is associated with, click **Collections**. See Create and Share Collections.

– Tags, like keywords, are terms that a user might search for. For example, you might have a document about an upcoming conference. You could tag the document with "conference", "event", "webinar", "breakouts", and other similar terms. To add or edit the tags for the content item, click **Edit Tags**. See Tag Assets.

- To change the channels the content item is targeted to, click **Targeted Channels**. See Create and Share Publishing Channels.

- To delete a content item, click **Delete**.

- To duplicate a content item, click **Duplicate**. A new version of the content item is created with "Copy" appended to the name. You can edit the item as needed without affecting the original version.

- To restrict the content item from being translated, click **Non-Translatable**. This action can't be undone, and it removes any existing translations, so be sure you want to make the item non-translatable before you confirm the action.

- To view the properties for this content item, click **Properties**. The properties include read-only information such as when the item was created and last updated, the translations for the item, the associated channels, and the associated collections.

- If permitted, you can translate the content item by clicking **Translate**. See Localize Content Items.

- If an individual translation has been added or edited, its status changes to draft. Before you can publish or submit it for approval, you must change the status to translated. To change the status, expand the content item, right-click or select the translated version you want, then click **Set As Translated**.

While viewing a content item, you can perform the following actions:

- To get a content item reviewed, click **Submit for Review**.

- To edit the content item, click **Edit**.

- To publish the content item, click **Create**, and then select **Publish**. See Publish Assets.

- If permitted, you can translate the content item by clicking **Create**, and then selecting **Add Translation**. See Localize Content Items.

- By default you see the content in the content item. To see the field names from the form in addition to the content, in the first drop-down list, select **Content Form View**.

- By default, the content is set to fit the browser window. To see how the content will look with the different layouts associated with the content type, select other layout options from the drop-down list. You can select different devices and with different sizes. You can also create your own device size. Alternatively, you can view the ruler by clicking ⬚. Click one of the intervals under the ruler to see how the item appears at different sizes. When you select a mobile device size you can also select ⬚ to see how the item appears on a mobile device depending on orientation.

- To create or participate in a conversation associated with this content item, click ⋮ , then, in the drop-down menu, select **Conversation**. See Use Conversations in *Managing Content with Oracle Content and Experience Cloud*.

- To view and manage translations for the content item, click ⋮ , then, in the drop-down menu, select **Translations**. You can use the options on this pane to:

  – Open a translation to view its content.

  – Delete a translation.

  – Designate a translation as the master in place of the original master.

  – View the status of all translations.

  – See which languages have been used for translation and which are available to use. The languages shown are those available in the channel for the repository where the content item is managed. Languages marked with an asterisk (*) are those that are required by the channel policies.

- To view API information for the content item, click ⋮ , then, in the drop-down menu, select **API Information**. The API information includes the API ID, the delivery URL (after the content item is published), the creation date, and the date it was last updated.

- To view the categories the content item is assigned to, click ⋮ , then, in the drop-down menu, select **Categories**. See Assign Asset Categories.

> **Note:**
>
> Categories are available only in Oracle Content and Experience Cloud, not Oracle Content and Experience Cloud-Classic.

Use Content Items

Content items can be used on a website or in another communication output.

Remember that a content item is created using a content type as a guide. Most content types are tailored to fit a particular need in a website or other type of output. After content items are created, they're available for use on a website if one is associated with the collection. Anyone with a contributor role for the website can add it

to the site by selecting it and dragging it and dropping it to the website in any slot that accepts content.

When you create a content item, you can edit it later and not affect anything where the content item is used. For example, perhaps you need to write a short, daily update for your website. You or your administrator create a content type called *News Article*. The content type has fields for short text, a date, and a small paragraph.

You create the *News Today* content item using that content type and you add it to your website collection. Then you add the *News Today* content item to your website and preview how it looks. Once it looks the way you want, it can be published.

Then you can edit *News Today* every day and change the text included in the item and publish it. That changed text will be reflected on the website without any need for someone to update the website daily. The content changes independently of the website.

Localize Content Items

Content items can be translated into multiple languages, if the associated repository allows for it. Only content items can be localized. Digital assets, such as images, cannot be localized.

Here are some things to keep in mind about localization:

- The available languages for a repository (and any of its content items) are determined by the localization policies of any associated publishing channels and any additional languages selected for the repository.

- When a content item is created, it can be designated as non-translatable, which means the option to translate the item won't appear on the menu.

- The localized version of the content item exists separately from the original master version. You can delete it, change its status, or edit it without affecting the master version.

- You can localize a batch of content items by exporting the files, translating them, and then importing the translated files, or you can add one translation at a time for a specific content item.

You can create and manage translations in the following ways:

- To localize a batch of content items, you export content item strings, download a .zip file of the source content, translate the content, and import the translations. See Localize a Batch of Content Items.

- To add a translation for a single content item, you create a copy of the content item, and translate the content. See Add a Translation for a Single Content Item.

- To see what translations exist and the status of those translations, in the list of assets, click the down arrow next to the language.
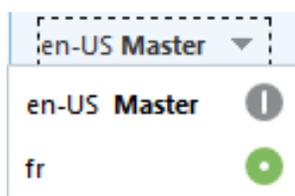
Alternatively you can select or right-click the content item, and click **Expand**.

- To view and manage translations for the content item, click ⋮ , then, in the
  drop-down menu, select **Translations**. You can use the options on this pane to:

  – Open a translation to view its content.

  – Delete a translation.

  – Designate a translation as the master in place of the original master.

  – View the status of all translations.

  – See which languages have been used for translation and which are available
    to use. The languages shown are those available in the channel for the
    repository where the content item is managed. Languages marked with an
    asterisk (*) are those that are required by the channel policies.

Add a Translation for a Single Content Item

You can create a translated content item individually, as described in this topic, or
translate a batch of content items.

See Localize a Batch of Content Items.

Follow these steps to add a translation for a single content item:

1. Open the content item, click **Create**, and then select **Add Translation**.

2. Follow the same procedure you followed to create a new content item, using the
   appropriate language for all fields:

   - Enter the name for the translated item.

   - Enter an optional description.

   - Choose the language from the available languages. The languages shown are
     those that are allowed in the repository and haven't yet been used for the item.

   - Enter the translated language version of the content item. Click **Compare** to
     select another language and copy the text for use in this new translated
     version. Controls appear under each field in the content item. Click **Show**
     under the content item field. The content of the field in the chosen language is
     displayed. Click **Copy** to use the text from the other language as the text for
     the original field.

   - Click **Save** when done.

3. Before the translated content item can be submitted for review or published, you
   must change the status to translated. With the translated content item still open,
   click **Set As Translated** in the banner.

Localize a Batch of Content Items

You can localize a batch of content items, as described in this topic, or add a
translation for a single content item.

See Add a Translation for a Single Content Item.

Export assets for translation:

1. Select the assets you want to export for translation. You can select individual assets from the **Assets** page, or a whole collection of assets from the **Collections** page.

2. Click **Translate**. You might need to click **More** to see the **Translate** option.

3. Enter information for the batch of assets you're exporting — the translation job, and then click **Create**:

   • Enter a name for the translation job.

   • Select the source language.

   • Select the target languages into which these assets will be translated.

   • Select a folder in which to store the exported asset file.

   • Click **Create** when done.

4. After the translation job has finished, download the .zip file of the exported assets. Click **Translation Jobs** in the banner, select the translation job, then click **Download**.

The export .zip contains `job.json` and a `root` folder containing a `<asset_GUID><asset_name>.json` file for each asset you exported, the source language file.

Translate the source language files:

1. For each language you selected as a target language, create a folder in the .zip file, for example, `de`, `es`, and `fr`. If the translation job was created prior to December 2018, you must include a folder for each language you selected when creating the translation job. If the translation job was created after December 2018, you can translate a subset of the selected languages. For example, you could translate into German (`de`) now, and then translate into Spanish (`es`) and French (`fr`) at a later time.

2. Copy *all* the `<asset_GUID><asset_name>.json` files from the `root` folder to each language folder.

3. Translate the strings in all of the `<asset_GUID><asset_name>.json` files to the appropriate languages. Do not delete any strings from the .json files, and do not rename the files.

4. Zip up the `job.json`, `root`, and all the language folders with the translated files.

After translating the assets, import the translations:

1. On the **Translation Jobs** page, click **Import**.

2. Click **Upload**, select the .zip file of translated assets, then click **OK**.

   Oracle Content and Experience Cloud validates that all the translations that are defined in the job are available in the .zip file. If you want to see which assets are included in the translation job, click the link in the dialog.

3. When you're ready to import the translations, click **Import**.

   The status of the import appears above the banner. You can view the details of the job by clicking **Details**.

See also Localize Content Items and Manage Asset Translation Jobs.

Manage Asset Translation Jobs

When you export content items for translation, a *translation job* is created. You can then download the files for translation, translate them, and then import the translated files.

Before you can manage a translation job, you need to export assets. See Localize Content Items.

The Translation Jobs page lists all translation jobs and their status:

- (Ready) - The .zip file of exported assets is ready to be downloaded.

- (In Progress) - The .zip file has been downloaded. The status will remain in progress until all translations for all targeted languages have been imported successfully.

- (Complete) - The translations for all targeted languages for this job have been imported successfully.

- (Failed) - The translation job failed. You should have seen a failure message above the banner about why the job failed. If you need to see the message again, you can **Resubmit** the translation job. Correct the problem, then **Resubmit** the job.

You can perform the following actions:

- To view the details of a translation job, open it. The details include the source language and all the selected targeted languages, and the status of those translations.

- To download the .zip file of exported assets for a job, select the job, and click **Download**.

- To delete a job, select the job and click **Delete**.

- To import translations, click **Import**, then click **Upload**, select the .zip file of translated assets, then click **OK**.
  Oracle Content and Experience Cloud validates that all the translations that are defined in the job are available in the .zip file. If you want to see which assets are included in the translation job, click the link in the dialog. When you're ready to import the translations, click **Import**.

5
Create and Manage Sites

To create a site, choose a template to get started. To change a site layout or content, create and open an update in the editor. To create and manage the site itself and the properties of the site, use the options in the site manager.

The Basics

- Quick Tour of the Sites Page
- Understand the Site Creation Process

Use Site Governance

- Understand Site Governance
- Change Template Policies
- Create Sites with Site Governance
- Manage Site Requests

Create Sites without Site Governance

- Create Sites without Site Governance

Manage Sites

- Manage Sites and Site Settings
- Take a Site Online or Offline
- Change the Site Description, Logo, or Embed Properties
- Translate a Site
- Manage Site Translation Jobs
- Set Search Engine Properties
- Customize Site Settings
- Enable Cobrowse Integration

Secure Sites

- Understand Site Security
- Change Site Security
- Add Site Redirects

Quick Tour of the Sites Page

The Sites page is your gateway to working with web sites.
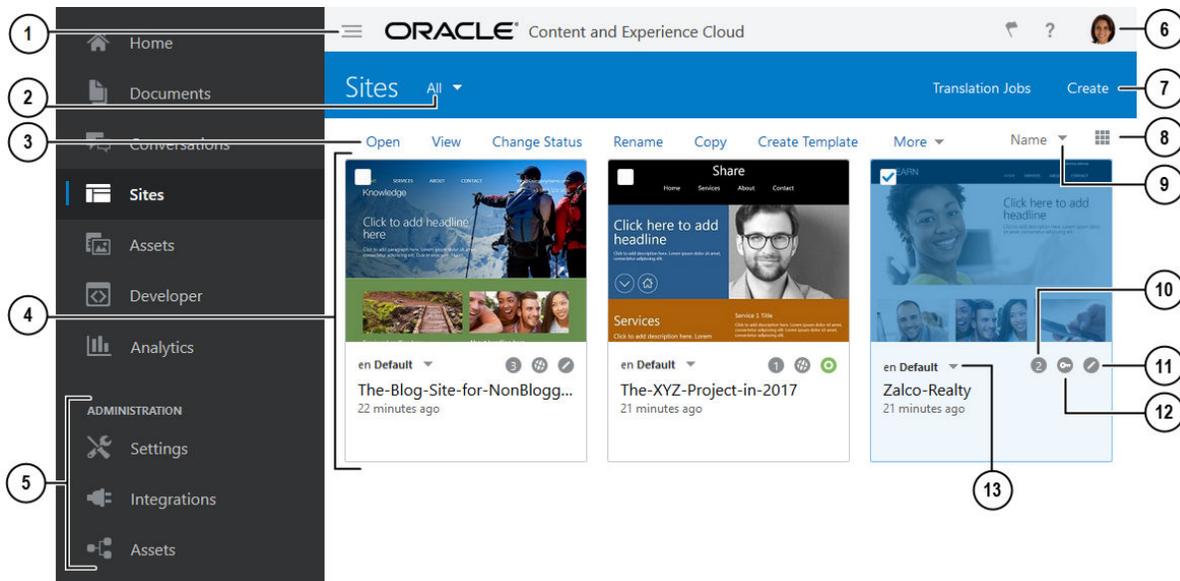
- The **panel toggle (1)** hides and shows the navigation menu.

- The **filter menu (2)** lets you filter the sites list to see all sites you have access to or subset of them. If site governance is enabled, you can view pending site requests.

- After you select a site in the list, the **menu bar (3)** is available. Use the options on the menu bar to open, view, change the status of, or rename your sites, and perform other tasks.

  The options that are shown depend on your role for the selected site. For example, if you created the site, then you have the Manager role for that site and can perform all the tasks listed. But if someone has shared a site with you and assigned you the Viewer role, you can view site properties, but you can't change anything.

  The menu options also depend on the current status of the site. The **Rename** and **Delete** options are available only if the site is offline.

  Tip: Looking for a shortcut? Right-click a site to open the context menu and choose an option.

- The **sites list (4)** shows all the sites you own or that were shared with you. The list includes the site name, the number of updates, if the site is secure, and the status of the site (online or offline).

- The **Administration menu (5)** is shown if you're logged in as a content administrator. Options here let you change service settings, set up integrations, and set up repositories and other asset-related features.

- The **user menu (6)** has options for setting your preferences, giving feedback, accessing help, and signing out. Click the user picture to display menu options.

- Click **Create (7)** to start the process of creating a website. Before you can create a site, your administrator must enable site creation and provide one or more templates. If you don't see the **Create** option on the sites page or templates on the template page, contact your service administrator.

- Click the **view icon (8)** to alternate the format of the list between a grid view and a list view.

- Use the **sort options (9)** to change the display order for the sites.

- Click the **update number (10)** to edit an existing update for the site or to create a new update for the site. If the site doesn't have any updates, you can create a new update by opening the site and changing the site editor to edit mode.

- Click the **Offline** or **Online (11)** icons to alternate the status of a site between offline and online.

- The **security (12)** icons show whether a site requires log in or not.

  Use the **language list (13)** to see the languages specified in the site's associated localization policy. To preview a localized version, select the language, and open the site.

Understand the Site Creation Process

Let's look at the overall process to create and publish a website.

Before you get started, your service administrator should have enabled site creation, configured who can create sites, and installed and made available the templates you'll use to create sites. See Get Started with Sites and Understand Site Governance.

If you'll be creating an enterprise site, which enables the use of assets and multilingual sites, it will be associated with a repository. You store the assets and documents you need for the site in the repository, and the repository policies dictate what can be done with the assets. The repository must be created before you create an enterprise site. See Understand Asset Repositories.

Here's an overview of the site creation process, with links to more information about the details.
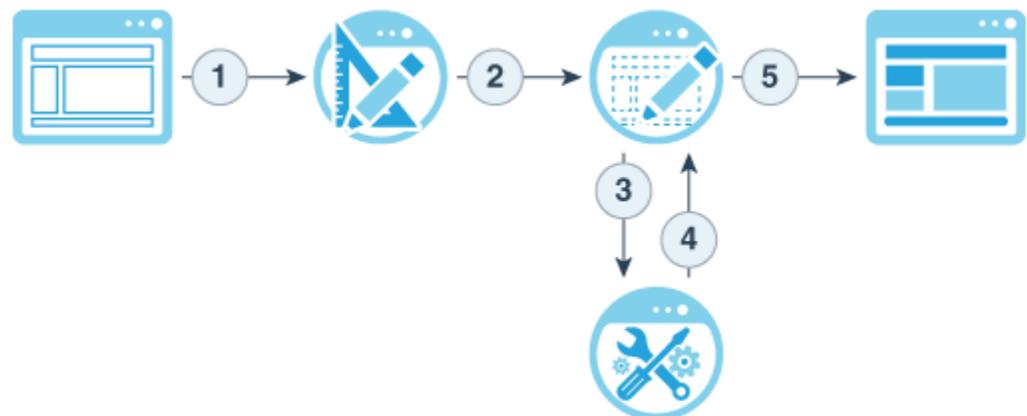
1. **Select a template and name the site**: If you see the Add Details for Your Site page, governance is enabled; see Create Sites with Site Governance. If the Create Site dialog pops up, governance isn't enabled; see Create Sites without Site Governance.

   If site governance is enabled and your site requires approval, you'll have to wait for it to be approved before you can complete the next step.

The site remains offline until you're ready to publish it.

2. **Create a site**: This creates an empty framework that you can customize.

3. **Create a new update or use an existing update**: An update is a named collection of changes to the current base site. Each time you view or edit a site in the editor, you use an update. See Understand Site Updates.

4. **Open the site in the editor**: Use the drag-and-drop editor to add pages and content to your site. See Understand Site Updates.

   - **Add pages to the site**: Select a predefined layout to quickly define the type of page. See Add Pages.

   - **Add components to a page**: Drag-and-drop text, images, documents, and more onto the page. See Use Built-In Components.

   - **Change the content or properties of a component**: Fine-tune the spacing, alignment, and other properties for components. See Use Styles and Formatting.

   - **Optionally switch the layout used for a page**: Change the page design on the fly. See Change the Page Layout.

   - **Optionally switch the theme used for the site**: Quickly change the look and feel of the entire site. See Use Templates and Themes in Sites.

   - **Set search engine properties**: Help search engines find your site to increase traffic. See Set Search Engine Properties.

5. **Apply a site update**: Update the site with the changes in an update. See Publish Updates.

   - **Share the site with other team members**: Share the site with specified users and assign each of them a role to determine what they can do with the site. See Understand Site Security for information about sharing.

   - **Set site security**: Choose which users can access your published site. See Change Site Security.

   - **Make the site online or offline**: Make the site publicly available or take it offline so only designated users can access it. See Take a Site Online or Offline.

Create Sites with Site Governance

To create a site (with site governance enabled), select a template, name the site, submit your site request, then, after it's approved, add content.

Before you can create a site, your administrator must enable site creation and make templates available to you. If you don't see the **Create** option on the Sites page or there aren't any templates available, contact your administrator. See Get Started with Sites and Understand Site Governance.

When you create a site, if you see the Add Details for Your Site page, governance is enabled; if the Create Site dialog pops up, governance isn't enabled. If site governance isn't enabled, see Create Sites without Site Governance.

1. Click **Sites**.

2. Click **Create**.

3. On the Choose from Available Templates page, select the template for your site.

4. On the Add Details for Your Site page, you see what approval is needed before the site is created and the minimum level of security required for the site. Enter the following information, and then click **Finish**.

- Enter enter a name for the site. The name is used in the site URL. You can use letters, numbers, underscores (_), and hyphens (-). The URL is case sensitive. If you enter a space, it's automatically replaced with a hyphen. Do not use the name of an existing site with different capitalization. For example, if a site exists called *ABC*, do not create another site called *Abc*. That can cause a name conflict.

> **✏ Note:**
>
> Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

- Enter an optional description for the site.

- Enter an optional justification for this site request. This will help the site administrator determine whether the request should be approved.

5. Click **Finish**.

If the site request requires approval, the site will be created after the site administrator approves it. You can see your pending requests on the Sites page, by selecting **Requests** in the filter menu. If your request is denied, you should see a message as to why it was denied, so you can correct the issue and submit your request again.

If the site request is set to be automatically approved, the site is automatically created. A progress bar shows the new site name and creation status. When the site is created, the name appears in the list of sites, and its status is offline.

After your site is created, you can share the site, change the security, and add and edit content. See Manage Sites and Site Settings and Edit Sites.

Manage Site Requests

If site governance is enabled, sites might need to be approved before they're created. You can view pending site requests on the Sites page, with the Requests filter.

See Understand Site Governance.

To view pending site requests, on the Sites page, in the filter menu, select **Requests**. If you're a site administrator, you see all site requests in your system, otherwise you see only those site requests you've submitted.

In the requests list, you can see a thumbnail of the site, the name of the site, who requested it, when it was requested, the site description, the status of the request, and an icon showing whether a site requires log in or not.

Depending on your role, you can perform the following actions:

- To view more details of the request, such as the minimum security required, an optional justification for the site, and thumbnails, click the site name or select the request, and then click **View**.

- If you're a site administrator, you can approve the request by selecting it, and then clicking **Approve**. The site will automatically be created after it's approved.

- If you're a site administrator, you can deny the request by viewing the details, and then clicking **Reject**. Enter a reason for denying the request, and then click **Reject**.
  Although you can alternatively deny the request by selecting it in the list of requests, and then clicking **Reject**, you won't be able to add a reason for rejecting it.

- If your request was rejected, you can view the details, edit your request as necessary, and then **Resubmit** the request.

- If you're the site creator, you can delete your request, by selecting it, and then clicking **Delete**.

After the site is created, you can share the site, change the security, and add and edit content. See Manage Sites and Site Settings and Edit Sites.

Create Sites without Site Governance

To create a site (with site governance disabled), select a template, name the site, and you can start adding content right away.

Before you can create a site, your administrator must enable site creation and make templates available to you. If you don't see the **Create** option on the Sites page or there aren't any templates available, contact your administrator. See Get Started with Sites and Understand Site Governance.

When you create a site, if the Create Site dialog pops up, governance isn't enabled; if you see the Add Details for Your Site page, governance is enabled. If site governance is enabled, see Create Sites with Site Governance.

If you are creating an enterprise site, which enables the use of assets and multilingual sites, you'll select a repository, localization policy, and default language during site creation. If a repository and localization policy aren't available, create them, or ask your content administrator to create them.

1. Click **Sites**.

2. Click **Create**.

3. In the Create Site dialog, select a template to use as the basis for your site, then click **Next**. The list includes all the templates you created and any templates that others shared with you.

4. Enter a name for the site. The name is used in the site URL. You can use letters, numbers, underscores (_), and hyphens (-). The URL is case sensitive. If you enter a space, it's automatically replaced with a hyphen. Do not use the name of an existing site with different capitalization. For example, if a site exists called *ABC*, do not create another site called *Abc*. That can cause a name conflict.

   Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes,

_themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

5. Enter an optional description for the site.

6. Select whether this will be an enterprise site, using digital assets and enabling multilingual sites. If you aren't creating an enterprise site, you can skip to the last step.

7. If desired, edit the default site prefix, which will be appended to content item slug values.

8. Choose the repository used to manage the content for the site.

9. Choose the localization policy used to determine which languages are required for the site.

10. Select the default language for the site. You see only those languages that are required by the localization policy.

11. When you're ready, click **Create**. A progress bar shows the new site name and creation status. When the site is created, the name appears in the list of sites. Its initial status is offline.

    To quickly find your newly created site in the list, sort the list by **Last Updated**. The site you just created is at the top of the list.

    To open the site so you can work on it, select the site and click **Open** in the menu bar.

If you created an enterprise site, a corresponding site collection is created in the repository you selected. If you share the site with a user, the user has the same permissions on the associated collection.

After your site is created, you can share the site, change the security, and add and edit content. See Manage Sites and Site Settings and Edit Sites.

Manage Sites and Site Settings

Site management includes creating and editing the site and managing the content used in the site. You use the *site editor* to create, copy, and delete site pages and page content. Use the *folder and file manager* to create, copy, share, and delete entire sites.

Use options on the menu bar or right-click menu on the Sites page and in the site editor to perform the following tasks.

Task	Description
Filter sites view	To filter the sites list, select one of the following options in the filter menu: • **All** - Shows all sites you have access to. If you're a site administrator and site governance is enabled, you have access to all sites in your environment. • **Yours** (available only to site administrators when site governance is enabled) - Shows sites you are a member of. • **Online** - Shows sites that are online (live). • **Offline** - Shows sites that are offline. • **Requests** (available only when site governance is enabled) - Shows pending site requests. If you're a site administrator, you see all site requests in your system, otherwise you see only those site requests you've submitted. • **Trash** - Shows sites that have been deleted.
Create a site	To create a site, click **Create**. When you create a site, you begin with a template. A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components. See Create Sites with Site Governance or Create Sites without Site Governance. You can see whether site governance is enabled by looking at the filter menu on the **Sites** page. If you see the **Requests** option, site governance is enabled. See Understand Site Governance.
View and manage site requests	To view pending site requests (available only when site governance is enabled), in the filter menu, choose **Requests**. If you're a site administrator, you see all site requests in your system, otherwise you see only those site requests you've submitted. See Manage Site Requests.
Edit a site	To edit the site, right-click it, and choose **Open**. See Edit Sites.
Discuss a site	To discuss a site, right-click it, choose **Open**, then click ⣿ to open the conversation panel.
View a site	To see what the site will look like when it's live (online), right-click it, and choose **View**.
Take a site online or offline	To take a site online or offline, right-click it, and choose **Change Status**. When a site is *online*, users can view it with a web browser at a designated address (URL). When a site is *offline*, the site isn't available for public viewing; you can view the site only in Oracle Content and Experience Cloud.
Rename a site	To rename a site, right-click it, and choose **Rename**. Enter a name for the site that's different from any existing site name on the same server. You can't rename a site if it's online. To take the site offline, you must be the site owner or have the manager role for the site.

Task	Description
Copy a site	If site governance isn't enabled, you can copy a site to get a head start in building a site. Everything from the original site, including the theme, all outstanding updates, the pages, the page content, and all other assets such as images, are copied to the new site under the new name you provide. Your new site is offline and ready for editing.
	Right-click the site you want to copy, and choose **Copy**. Enter a name for the copied site that's different from any existing site name on the same server. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.
	Optionally, select **Include updates** to copy any outstanding updates from the original site to the copied site.
Create a template from a site	If you have a site that you want to use as a starting point for other sites, you can create a template from that site. Right-click the site, and choose **Create Template**. See Create a Template from a Site.
Delete or restore a site	If you have the appropriate permissions, you can delete a site and its contents. When you delete a site, everything in the site folder, including all outstanding updates, site pages, page content, and assets such as images that you added to pages are put in the trash.
	You can delete or restore a site if you created the site (you're the site owner) or if someone shared a site with you and gave you the Contributor or Manager role.
	You can't delete a site if it's online. To take the site offline, you must be the site owner or have the manager role for the site.
	To delete a site, right-click it, and choose **Delete**. You're prompted to move the site and all site updates to the trash. A deleted site stays in the trash until: • You restore the site. • You permanently delete the site. • Your trash quota is reached. • The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days.
	To restore a site, in the Sites menu, choose **Trash**. Select the site from the list, and choose **Restore**.

Task	Description
Add members to a site	If your administrator enabled sharing, you can share your site with other Oracle Content and Experience Cloud users and allow them to view, modify, or manage the site in Oracle Content and Experience Cloud based on the permission you give them. Anyone who can access your service is considered a member. When you share a site, you assign a role that defines what the member can or can't do with your site. Members can only use your site according to the role you assign to them. Right-click the site you want to share, choose **Members**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can view the site in the editor, but can't change anything. • **Downloader**: For a site, the downloader role provides the same privileges as the viewer role and the user can create a new template from the site. • **Contributor**: Same as viewer, and can also edit the site, delete site pages, and delete the site if it's offline. • **Manager**: Same as contributor, and can also add users and assign their roles, publish changes to an online site, and switch the site online and offline. The creator of a site (the owner) is automatically assigned the manager role.
Change site properties (description, logo, etc.)	To change the site description, add a logo, allow the site to be embedded, and view valuable information about a site, including the site URL, site owner, and other details, right-click the site, and choose **Properties**. See Change the Site Description, Logo, or Embed Properties.
Translate a site	You can translate an enterprise site into multiple languages, if the associated repository allows for it, by exporting the site files, translating them, and then importing the translated files. See Translate a Site.
Set search engine properties	In the site editor, you can provide keywords and text to help search engines identify the content of the site. See Set Search Engine Properties
Customize site settings (favorite icons, controller files, etc.)	In the site editor, you can specify the site icons used with different browsers and platforms, or add a controller file to handle link behavior. See Customize Site Settings
Enable cobrowsing	In the site editor, you can enable the Oracle Cobrowse Cloud Service, a collaboration tool that lets you share screens or initiate a cobrowsing session with another person. For example, you may want to include this on an order form so a representative can view a customer's screen while the customer is placing an order. See Enable Cobrowse Integration
Add analytics tracking to a site	In the site editor, you can add a snippet of JavaScript tracking code to a site for web analytics tracking, making it easier to integrate with external analytics providers like Google, Adobe, or Oracle Infinity. See Add Web Analytics Tracking Snippets to Sites and Pages in *Administering Oracle Content and Experience Cloud*.

Task	Description
Secure a live site	When you publish a site and make it available online, it's publicly available to anyone. However, if you're the site owner or have the manager role, you can restrict live sites to be available to registered users or a subset of users. To change the status of a site, you must be the site owner or have the manager role.
	Right-click the site you want to secure, choose **Properties**, and click the **Site Security** tab. See Change Site Security.
Add a site redirect	If the site URL changes, a redirect forwards one URL (source) to another URL (target). This helps to preserve user bookmarks and search engine rankings. See Add Site Redirects.

Take a Site Online or Offline

When a site is *online*, users with proper access can view it with a standard web browser at a designated address (URL). When a site is *offline*, the site isn't available for public viewing. You can view the site only in Oracle Content and Experience Cloud.

A status icon to the right of the site name shows if the site is online ✅ or offline ⊘.

For information on who can access an online or offline site, see Understand Site Security.

To change the status of a site, you must be the site owner or have the manager role, or, if site governance is enabled, site administrators can change the status of any site.

1. On the Sites page, select the site from the list.

2. Click **Change Status** in the menu bar or click the status icon.

   You're prompted to confirm your choice.

3. Click **Confirm to proceed** and then click **OK**.

   The status icon changes to 🔼 and includes text updates as the site is queued and published. The status icon changes to ✅ when the site is online.

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name. The format of the default URL is:

```
https://service_name.identity_domain.sites.oraclecloud.com/site_name
```

When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud.

Change the Site Description, Logo, or Embed Properties

Most site properties are set when you create or update a site. When you view properties, you can get valuable information about a site, including the site URL, site owner, and other details.

To change the site description, its logo, and to allow the site to be embeddable:

1. Right-click the site and choose **Properties**.

2. To change the optional description of the site, click the **Site Properties** tab and enter or change the description.

3. You can't change the site URL directly, but you can select and copy the site URL and then paste it into documents, presentations, and email to provide access to the site.

   If the site is online, click to go directly to the online site.

4. To allow the site to be used as an embedded site, toggle **Yes** next to **Embeddable Site**.

5. To change the site image, click the **Site Logo** tab, then click **Change**. Find and select the image to use. It must be a .png, .jpeg, or .jpg file and have a 4:3 (rectangular) ratio. The best size is 300x225 pixels because smaller images might be distorted and bigger ones might affect performance.

6. When finished, click **Done**.

Translate a Site

You can translate an enterprise site into multiple languages, if the associated localization policy allows for it, by downloading the site files, translating them, and then importing the translated files.

You can translate a site into any language specified in the localization policy. To see the languages specified in the site's associated localization policy, in the site tile, click the down arrow next to the language. To preview a localized version, select the language, and open the site.
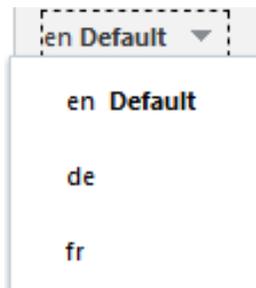
When you select a site for translation, a .zip file of the site files is created. The .zip contains the following files and folders:

- `assets` folder—This folder exists only if you select to translate the entire site, including assets.

  - `root` folder

    * a `<contentItem_ID>.json` file for each content item—includes name, description, and translatable strings from fields in the content item, as well as additional information about the content item that shouldn't be edited.

  - `job.json`—a file describing the translation job. Don't edit this file.

- `site` folder

- `root` folder

  * a `<page_ID>.json` file for each site page—includes name, title, description, keywords, header, footer, and translatable strings from components on the page, as well as additional information about the page that shouldn't be edited. If you have custom components, they might have been configured to use translatable strings. See Develop Translatable Components for Multilingual Sites in *Developing for Oracle Content and Experience Cloud*.

  * `siteinfo.json`—includes description, keywords, header, and footer.

  * `structure.json`—includes navigation and site structure.

- `job.json`—a file describing the translation job. Don't edit this file.

If you have assets on a page in a translated site, either directly or in a content list, and you've translated those assets, Oracle Content and Experience Cloud will display the assets in the same language as the site. You can also translate content items separate from a site; see Localize Content Items.

Create a translation job:

1. Select the site you want to translate, and then click **Translate**. You might need to click **More** to see the **Translate** option.

2. Enter information for the site files you're exporting — the translation job, and then click **Create**:

   • Enter a name for the translation job.

   • Select the target languages into which the site will be translated.

   • Select whether to export the site content (pages, structure, and site info) and targeted assets, or just the site content.

   • Click **Create** when done.

3. After the translation job has finished, download the .zip file of the site files. Click **Translation Jobs** in the banner, select the translation job, then click **Download**.

Translate the source language files:

1. For each language you selected as a target language, create a folder in the .zip file at the same level as the `root` folder, for example, `de`, `es`, and `fr`. You can translate a subset of the selected languages. For example, you could translate into German (`de`) now, and then translate into Spanish (`es`) and French (`fr`) at a later time.

2. Copy *all* the `.json` files from the `root` folder to each language folder.

3. Translate the strings in all of the `.json` files to the appropriate languages. Do not delete any strings from the .json files, and do not rename the files.

4. Zip up the `site` folder, with `job.json`, `root`, and all the language folders with the translated files.

After translating the site files, import the translations:

1. On the **Translation Jobs** page, click **Import**.

2. Click **Upload**, select the .zip file of translated site files, then click **Open**.

3. After the file is uploaded, select it, then click **OK**.

Oracle Content and Experience Cloud validates that the translations that are defined in the job are available in the .zip file. If you want to see which pages and assets are included in the translation job, click the link in the dialog.

4. When you're ready to import the translations, click **Import**.
The status of the import appears above the banner. You can view the details of the job by clicking **Details**.

If you change the site after translation, you'll need to translate any new or edited strings. When you edit a site in the site editor, you edit the default language version of the site. Any site structure changes you make, such as adding components or rearranging pages, will be replicated in the localized versions of the site. You can then create a new translation job to translate the updated strings.

Manage Site Translation Jobs

When you select a site for translation, a *translation job* is created. You can then download the files for translation, translate them, and then import the translated files.

To create a translation job, see Translate a Site.

The Translation Jobs page lists all translation jobs and their status:

- (Ready) - The .zip file of site files is ready to be downloaded.

- (In Progress) - The .zip file has been downloaded. The status will remain in progress until all translations for all targeted languages have been imported successfully.

- (Complete) - The translations for all targeted languages for this job have been imported successfully.

You can perform the following actions:

- To view the details of a translation job, open it. The details include the source language and all the selected targeted languages, and the status of those translations.

- To download the .zip file of site files, select the job, and click **Download**.

- To delete a job, select the job and click **Delete**.

- To import translations, click **Import**, then click **Upload**, select the .zip file of translated site files, then click **OK**.
Oracle Content and Experience Cloud validates that all the translations that are defined in the job are available in the .zip file. If you want to see which site pages are included in the translation job, click the link in the dialog. When you're ready to import the translations, click **Import**.

Set Search Engine Properties

You can provide keywords and text to help search engines identify the content of the site.

You can define search engine optimization (SEO) settings at the site level and at the page level. The site-level settings augment or override similar settings for individual pages as described in the table below.

Option	Site Level	Page Level
Description or Page Description	Provides general information about the site that isn't included in the site itself. The site description is included on each page in the site This description is also used as the page-level description for the home page only if there's no value set using **Page Settings** for the home page.	Provides general information about the page that isn't included in the page itself. The page description is in addition to the site description included with every page in the site.
Keywords	Identifies terms or concepts that apply to all pages on the site. These values are added (appended) to the keywords specified for individual pages.	Identifies terms or concepts that apply to the individual page. Page keywords may be useful to identify terms or concepts that don't appear in the text of the page or that appear in images.
Header or Page Header	Add scripting or tags for analytics or tracking to your site. The site header content is included on each page in the site.	Add scripting or tags for analytics or tracking to your site. The page header content is in addition to the site header content included on each page.
Footer or Page Footer	Add scripting or tags for analytics or tracking to your site. The site footer content is included on each page in the site.	Add scripting or tags for analytics or tracking to your site. The page footer content is in addition to the site footer content included on each page.
Search Exclusions	If you specify the following options at the site level, the setting applies to all pages and overrides the setting on the individual pages. If you don't select this option at the site level, then only those pages that individually specify the option use the option.	If you specify the following options at the page level, the setting applies only to the page. The same setting set at the site level overrides the individual page setting.
Hide from search engines	If selected, add the NOINDEX meta tag to every page so that search engines won't index the content of any page on the site. In this case, the site and all its pages won't shown up in the web search results.	If selected, add the NOINDEX meta tag to the current page so that search engines won't index the content of the page. In this case, the individual page won't shown up in the web search results.
Hide page links from search engines	If selected, add the NOFOLLOW meta tag to every page so that search engines won't follow links (and then index the destination) on any page on the site.	If selected, add the NOFOLLOW meta tag to the current page so that search engines won't follow links (and then index the destination) on the page.
Hide page descriptions from search engines	If selected, add the NOSNIPPET meta tag to every page so that search engines won't include the description (specified above) after the page in the search results.	If selected, add the NOSNIPPET meta tag to the current page so that search engines won't include the page description (specified above) after the page in the search results.

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Option	Site Level	Page Level
Disable search engine page caching	If selected, add the NOARCHIVE meta tag to every page so that search engines won't include an image of the cached page in the web search results.	If selected, add the NOARCHIVE meta tag to the current page so that search engines won't include an image of the cached page in the web search results.

To change search engine optimization (SEO) settings:

1. Open a site for editing.

2. Click ⚙ in the sidebar and then click ⟋.

3. Provide an optional description for the site. The site description is included on each page in the site.

   This description is also used as the page-level description for the home page only if there's no value set using **Page Settings** for the home page.

4. Optionally, specify keywords separated by commas to help search engines identify the content of the site.

   Site keywords identify terms or concepts that apply to all pages on the site. These values are added (appended) to the keywords specified using **Page Settings** for individual pages.

5. Optionally, add header scripting or tags for analytics or tracking to your site. The header content is included on each page in the site. Validate any code you use in the header to make sure that it works properly and that it does not introduce any security risks to your site.

6. Optionally, add footer scripting or tags for analytics or tracking to your site. The footer content is included on each page in the site. Validate any code you use in the footer to make sure that it works properly and that it does not introduce any security risks to your site.

7. Optionally, select one or more of options to exclude information from appearing in search results, as described in the previous table.

8. To save all pending changes in the current update, click **Save**.

Customize Site Settings

You can specify the site icons used with different browsers and platforms, or add a controller file to handle link behavior.

A *sitemap* is an XML file that you can use to list URLs for a website and information about each URL, such as when it was last updated. A *robot file* is a text file you can create to instruct search engine robots how to index pages on your website. You can also upload an auxiliary file with additional information, such as site ownership verification. These kinds of files help search engines crawl through a site more efficiently.

These settings are stored in an update until you publish the update. After publishing, the files are stored in the root folder of the theme so any sites using that theme will use these files.

To change the icons and link behavior for the entire site:

1. Open a site for editing.

2. Click ⚙ in the sidebar and then click ⬜.

3. In the Favorite Icons section, choose an image to use for the site when the site is minimized in a browser or on a different platform, such as a mobile device. The icon must be stored as a digital asset that you can access. Click **Select file to upload**, navigate to the icon and select it, then click **OK**. Customization is needed for the favorite icon to work all browsers:

   • **For Chrome and Safari** there must be a reference to the favorite icon, including the site prefix, in the controller file, as shown in this example:

   ```
   <link rel="shortcut icon" href="/mySitePrefix/favicon.ico" />
   ```

   For Internet Explorer 11 and Firefox, a similar entry must be included in the page templates. However, a page template is part of a theme and it might be used in multiple sites. Therefore, it can't use a fixed site prefix and must use a token instead. See this example:

   ```
   <link rel="shortcut icon" href="<!--$SCS_SITE_PATH-->/
   favicon.ico" />
   ```

   The token will be swapped with the site prefix when the page is delivered.

   Note that Internet Explorer and Firefox load a favorite icon from the controller and again from the page template. Therefore, the icon will flash unless the same one is referenced from both the controller and the page template. Chrome and Safari only load the icon that's referenced from the controller.

4. In the Controller File section, you can add a file that alters the way browsers process link requests. In addition to referencing favorite icons, you can also add OpenGraph tags or metadata tags for webmaster site verification, or for sharing the site on social media. You download the default controller file and edit it, or upload your own file. The file must be stored as a digital asset that you can access. Click **Select file to upload**, navigate to the file and select it, then click **OK**.

   For example, if your site contains a Facebook Share button, you may want to provide metadata that Facebook can use to show details about your site in Facebook, as in this example:

   ```
   <meta property="og:image" content="https://my.domain.com/fb-image.jpg"/>
   <meta property="og:title" content="My Site Title on FB!"/>
   <meta property="og:url" content="https://my.domain.com"/>
   <meta property="og:site_name" content="My Site Name on FB"/>
   ```

   You can add a Google webmaster verification tag, similar to this example:

   ```
   <meta name="google-site-verification"
   content="GCVURS9d2fP6jev5upt0Yt1AIp71C9D__ALqS8pg" />
   ```

5. You can upload more files if needed, such as those needed to verify site ownership. The file must be stored as a digital asset that you can access. Click **Select file to upload**, navigate to the file and select it, then click **OK**.

6. You can choose a provider for the map component and the links used. Select either **Oracle Maps** or **Google Maps**.

7. When you publish the update, the changes are published and put into use.

Enable Cobrowse Integration

The Cobrowse feature is a collaboration tool used with the Oracle Cobrowse Cloud Service.

Integration with Cobrowse Cloud Service must first be added as an accepted integration by the service administrator. See Integrate with Oracle Cobrowse Cloud Service in *Administering Oracle Content and Experience Cloud*.

After Oracle Cobrowse Cloud Service integration is enabled, the feature can be configured for the site and then added to specific site pages for use.

To enable cobrowsing on a site:

1. Open a site for editing.

2. Click ⚙ in the sidebar and then click ▭.

3. In the Cobrowse section, select **Enable use of Oracle Cobrowse on this site**.

4. Enter the launcher script for the site. An Oracle Cobrowse Cloud Service administrator can access the Cobrowse administration console to obtain the appropriate launcher Javascript snippet. There are two different types of launchers.

   • Launch Point 1: a cobrowse button is automatically added on a page.

   • Launch Point 2: allows you to customize the button and the interface that is added on a page.

5. Click **Close**.

After Cobrowse is enabled for the site, you can add it to a page or customize how it is used on a page. See Using Cobrowse on a Page for details.

Use Cobrowse with Secure Sites and Site Builder Testing

Cobrowse has two modes: Instant (ICB) and Advanced (ACB). An extra configuration is needed to use Cobrowsing in ICB mode for a secured site or to preview a site still in development. This configuration is done in the Cobrowse Administration Console.

In the Custom Functions field, add a function to allow agents to see password-protected resources on a published secure site:

```
function () {
return {
passwordProtectedPatterns: [
"<PROTOCOL>://<DOMAIN>/authsite/*?*",
"<PROTOCOL>://<DOMAIN>/documents/*?*",
"<PROTOCOL>://<DOMAIN>/content/*?*#*"
]
}
}
```

To use this function for both published secure sites and to view/preview a site in development, add additional code:

```
function () {
return {
passwordProtectedPatterns: [
"<PROTOCOL>://<DOMAIN>/authsite/*?*",
"<PROTOCOL>://<DOMAIN>/documents/*?*",
"<PROTOCOL>://<DOMAIN>/content/*?*#*"
"<PROTOCOL>://<DOMAIN>/sites/*?*#*",
"<PROTOCOL>://<DOMAIN>/_themes/*?*",
"<PROTOCOL>://<DOMAIN>/_sitescloud/*?*",
"<PROTOCOL>://<DOMAIN>/_compdelivery/*?*"
]
}
}
```

Configuring protected resources is a new Cobrowse feature. It uses the same wildcard URL patterns as Cobrowse Page Masking. For more details, see Configure page masking in the *Cobrowse Deployment and Use Guide*.

Understand Site Security

You can apply security to control who can see the published (online) site, who can see and interact with secure content on the site, and who can see and edit the unpublished (offline) site.

Site Security

When you publish a site and make it available online, you'll want to control who can access the site. Depending on how your system and site administrators configured your environment, you can make the site publicly available to anyone, restrict the site to registered users, or restrict the site to specific users.

You must be the site owner or have the manager role to change site security or any other settings. To change the sign-in requirement, the site must be offline. To change the specified users or user roles, however, the site can be online. When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud.

The security options available may be limited by the template policy if site governance is enabled or by the tenant policy if site governance is disabled. See Understand Site Governance.

When you secure a site, you specify which groups of users can access your published (online) site based on an assigned role. These roles are service-wide roles assigned by an administrator of the service instance.

- **Cloud Users**: Authenticated users sign in to the service instance with a user name and password. This includes all authenticated users with or without the **Oracle Content and Experience Cloud Visitors** role or the **Oracle Content and Experience Cloud Users** role.

- **Visitors**: Only users with this role can access the site. For example, this role might be given to users who can see published sites, but don't have access to folders and files in this instance of Oracle Content and Experience Cloud.

> **✎ Note:**
>
> This doesn't include users with the **Oracle Content and Experience Cloud Users** role unless they're the site owner or the site was explicitly shared with them.

- **Service Users**: Only users with this role have access to the site. For example, this role might be given to users who can both see published sites and have access to folders and files in this instance of Oracle Content and Experience Cloud.

- **Specific Users**: Only the users you add as members of the site can see the published site.

Site Sharing

With *site sharing*, you specify individual users who can access your unpublished (offline) site and allow them to view, modify, or manage the site based on the permission you give them. You can share a site if you're the site owner or if the site was shared with you and you were given the Manager role.

> **✎ Note:**
>
> Any sharing role you assign to a user augments their security role. For example, if a user has the **Oracle Content and Experience Cloud Visitors** role, but you share the site and give them a contributor role, they can modify the offline site while others with the **Oracle Content and Experience Cloud Visitors** role can only view the online site.

- **Viewer**: Viewers can view the site in the editor, but can't change anything.

- **Downloader**: For a site, this has the same privileges as the viewer role.

- **Contributor**: Same as viewer, and can also edit the site, delete site pages, and delete the site if it's offline.

- **Manager**: Same as contributor, and can also add users and assign their roles, publish changes to an online site, and switch the site online and offline. The creator of a site (the owner) is automatically assigned the manager role.

When you create a site, a channel is created with that site name. In order to share the channel with others, you must share the site and give someone a minimum of a contributor role in order for that person to use the channel for publishing assets. In order to publish a site, a user must have a Manager role.

Component Sharing

Some components provide access to shared resources such as folders, files, or conversations. *Component sharing* considers both site security (who can view the published site) and resource sharing (who can view and work with folders, files, and conversations).

For example, when you add a document manager component to your site, all visitors to the site can see the content of the folder, and based on their role and any other permissions, they may be able to add, modify, or delete what's in the folder.

General considerations:

- A site author can't grant access to a folder that's greater than the access they themselves have. For example, if the author has downloader access to a folder, they can't give contributor rights to site visitors.

- The privileges set in the component can augment the visitor's privileges. For example, if the visitor has viewer privileges (or no privileges) for a folder, the documents manager component can grant greater privileges based on the role selected in the component. These enhanced privileges are valid only in the component itself.

- If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

- Privileges granted on a folder apply to the folders and files nested in that folder.

For public sites:

- Conversation components are supported on secure sites only.

- Documents manager components give all visitors downloader privileges for the associated folder by default. You can change the role within the guidelines listed above, and you can restrict the options presented to the user with settings on the component itself.

- Folder list and file list components grant all users downloader access. Users can view and download files regardless of their role.

Secure Sites URL

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name.

The format of the default URL for unsecured sites is:

```
https://service_name.identity_domain.sites.oraclecloud.com/site_name
```

The format of the default URL for secured sites is:

```
https://service_name.identity_domain.sites.oraclecloud.com/authsite/
site_name
```

Note the addition of `authsite` in the URL.

Change Site Security

When you publish a site and make it available online, you'll want to control who can access the site. Depending on how your system and site administrators configured your environment, you can make the site publicly available to anyone, restrict the site to registered users, or restrict the site to specific users.

You must be the site owner or have the manager role to change site security or any other settings. To change the sign-in requirement, the site must be offline. To change the specified users or user roles, however, the site can be online. When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud. To take a site offline, select the site from the Sites page and click

Change Status in the menu bar or click the status icon. You're prompted to confirm your choice.

To change site security:

1. On the Sites page, select the site and choose **Properties** from the menu bar or the right-click menu.

2. Click the **Site Security** tab.

   The available options on the Site Security tab depend on how your system administrator configured site security settings and, if site governance is enabled, how your site administrator configured the security settings in the template this site is based on. See Get Started with Sites and Understand Site Governance.

3. To require registered users to sign in to see the site when it's online, click **Yes** next to Login Required. To remove the requirement and make the site publicly available when it's online, click **No** next to Login Required.

4. Select which groups of registered users can access the online site. To select individual groups, first deselect **Cloud Users**.

   • **Cloud users**: Only authenticated users have access to the site. Authenticated users sign into your domain with a user name and password. This includes users with either the **Oracle Content and Experience Cloud Visitors** role or the **Oracle Content and Experience Cloud Users** role.

   • **Visitors**: Only users with this role have access to the site. This doesn't include users with the **Oracle Content and Experience Cloud Users** role.

   • **Service users**: Only users who can sign into this instance of Oracle Content and Experience Cloud can access the site.

   • **Specific users**: Specify individuals who can access to the site. Click **Add Members**. Enter a user name or a portion of a user name in the search field. Select the user from the displayed list and repeat to add more users. When done, click **Add**. To remove a user, click **Remove** from the menu below the user's name.

5. Click **Save** to save your changes and close the window.

   The site shows that it's offline and that login is required.

6. To make the site online, click **Change Status** in the menu bar or click the status icon. Click **Confirm to proceed** and then click **OK**.

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name.
The format of the default URL for unsecured sites is:

```
https://service_name-identity_domain.sites.oraclecloud.com/site_name
```

The format of the default URL for secured sites is:

```
https://service_name-identity_domain.sites.oraclecloud.com/authsite/
site_name
```

Note the addition of `authsite` in the URL.

You can add a logout URL and implement it as a link, or a button, or a page that shows up in the menu. See Paragraphs, Buttons, and Add Pages.

The format of the logout URL is:

```
https://login.us2.oraclecloud.com/oam/server/logout?end_url=https://
service_name-identity_domain.sites.us2.oraclecloud.com:443/authsite/
site_name
```

Add Site Redirects

If the site URL changes, a redirect forwards one URL (source) to another URL (target). This helps to preserve user bookmarks and search engine rankings.

Two types of redirects can be used:

- A permanent redirect, which uses a 301 HTTP service response code
- A temporary redirect, which uses a 302 HTTP service response code

To upload a `redirect.json` file:

1. Open a site for editing.

2. Click ![gear icon] in the sidebar and then click ![icon].

3. Click **Select file to upload** and navigate to the file you want to use, select it, then click **OK**.

4. When you publish the update, the changes are published and put into use.

6

Use Templates and Themes in Sites

A template has what you need to get started with a site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components. A *theme* defines the general look-and-feel—the overall style—of a site, including color scheme, font size, font type, and page backgrounds.

Templates

- Understand Templates
- Create a Template from a Site
- Change Template Details
- Change Template Policies
- Manage Templates
- Export and Import Templates

Themes

- Understand Themes
- Manage Themes
- Publish Themes

Understand Templates

A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components.

Default Templates

Oracle Content and Experience Cloud provides a number of templates that you can use to create sites. Just select a template, name the site, and you can start adding content right away. These templates are typically installed by a service administrator when the service is initialized.

Template	Description
Collateral Showcase	The Collateral Showcase template has a right justified horizontal menu style, simple page layouts, and top-level pages that list related video assets followed by nested detail pages each showcasing a particular video. It features a standard menu component and shows the current logged in user.

Template	Description
New Product Launch	The New Product Launch template has a right justified horizontal menu and layouts for case studies, details on features, pricing, your company, and contact information. The home page has a rotating banner image plus text.
Products and Services Overview	The Products and Services Overview template has layouts for case studies, details about the product offering, your company, privacy policy and more. The home page has a rotating banner image plus text. The template is fully responsive.
Starter Template	Use the Starter template to create your own ready-made site solutions. The starter template provides a simple, yet fully functional example that you can explore and expand with components and interactions. It includes the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and a custom component with trigger and action functionality. The sample pages include information about creating templates with links to resources providing more detailed information.
Learn **Present** **Show**	These templates are color-variations of each other. They are responsive and feature a custom JavaScript menu component within the group. They feature custom component groups that feature a number of standard components. They also show the logged in user.
Access **Knowledge** **Relate**	These templates are color-variations of each other. They are responsive and feature a custom JavaScript menu component within the group. They feature custom component groups that feature a number of standard components.
Share	This template is a site that features a single, long page. It is responsive and features a custom JavaScript menu that navigates to locations on the page rather than to separate pages.
JET Starter Template	Oracle JET (JavaScript Extension Toolkit) is a modular, open source toolkit using a collection of open source JavaScript libraries. See Oracle Jet for complete details.

You can also create a template from an existing site, or you can export an existing template, modify it offline, and import it as a new template. Your organization may have templates for you to use.

How Templates Work

When you create a site, the template is used as follows:

- If site governance is enabled, sites might require approval before they're created. See Understand Site Governance.

- The default site in the template is copied to the new site to provide a starting point for your pages.

- All necessary support files are copied to the new site.

- If the template theme doesn't exist in the themes folder, the theme is copied to the themes folder. The site references the theme from its location in the themes folder. If the theme exists, the new site simply references the existing theme.

- If there are custom components that don't exist in the components folder, they're copied to the components folder. The site references the components from their locations in the components folder. If any of the components exist, the new site references the existing components.

Create Custom Templates

If you're a web developer, a template collects all the pieces you need to construct a website in one package including the site, layout, navigation, sample content, and so on. You can add components and interactions to the site to provide ready-made site solutions that meet your business needs.

A template is represented by a folder structure that you can work with like other folders. Some elements of the template, such as the theme and custom components, are referenced from their associated locations in Oracle Content and Experience Cloud. For example, a template references the associated theme from the list of available themes like a site references a theme.

If you create a template from an existing site, the new template uses a copy of the site as its default site. The template references the theme used by the site and any custom components used in the site pages. The theme and custom components aren't copied to the template, but are referenced in the same way they are by the site.

> ✎ **Note:**
>
> The template reflects the site used at the time the template is created. Further changes to the site that was used to create the template aren't reflected in the site stored with the template.

You can create content templates which can be used to share content models, which includes content layouts, content items, and digital assets that are needed to support a content model (such as sample content). Content templates should be created from sites with published content items and digital assets. Note that content types are not created when a site template is imported from a package with content. They are created when a site is created from the content template. Therefore, content types are not owned by the user who imports the site template. Instead, content types are owned by the user who creates a first site from that template. That user can then share the template with other users as needed. This feature may not be available depending on the Content and Experience Cloud subscription type and start date of your service.

When you export a template, all elements of the template, including a copy of the theme and any components, are collected in a template package that you can download and work with offline.

If you import a template you modified offline, and if the template, theme, or custom component names or IDs already exist, you're prompted to resolve the conflicts. You may be given the option to create a new template, theme, or custom component, or in some cases, you can overwrite the existing template, theme or custom component with the imported version. See Developing Templates in *Developing for Oracle Content and Experience Cloud*.

Share Templates

When you create a template, whether by importing, copying, or creating from a site, the template can't be used by anyone else until you share it.

> **Note:**
>
> This is also true for the templates provided with Oracle Content and Experience Cloud and installed by an administrator. If you don't see any templates, contact your administrator. They may not have been shared with you.

When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the downloader role to ensure that they're available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components.

If site governance is enabled, you make templates available through template policies. See Understand Site Governance and Change Template Policies.

Create a Template from a Site

If you have a site that you want to use as a starting point for other sites, you can create a template from that site.

> **Note:**
>
> To create a template from a site, you must have the Downloader, Contributor, or Manager role for the site.
> In addition, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the templates page, contact your administrator.

These steps show how to create a template from a site. You can also import a template package that you created or modified offline. See Export and Import Templates.

To create a template from a site:

1. Click **Sites** and select the site you want to use.

2. Click **Create Template**.

3. Enter a name for the template. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.

   Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

4. Enter an optional description for the template.

5. Choose whether you'll include unpublished content items and digital assets in the template.

6. When you're ready, click **Create Template**.

When the template is created, the name appears in the list of templates. To see all templates, click **Developer** and then **View All Templates**. To view the folders and files associated with a template, right-click the template and choose **Open**. To view or change the name, description, and other details about the template, click the template name or right-click the template and choose **Details**.

The new template uses a copy of the site as its default site. The template references the theme used by the site and any custom components used in the site pages. The theme and custom components are not copied to the template, but are referenced in the same way they are by the site.

The template reflects the site used to create it at the time the template is created. Any future changes to the site used to create the template are not reflected in the site stored with the template.

Change Template Details

If you have the appropriate permissions, you can change or update template properties such as the name, description, and the icon used in the template list. You can also add support files and preview images for users of the template.

You can update template details if you created the template (you're the template owner) or if someone shared a template with you and gave you a Contributor or Manager role.

If you add support files or preview images, the files are stored in the template's asset folder. These file don't appear in any associate website, but allow the template owner to provide information about the template itself.

To view or change template details:

1. Click **Developer** and then click **View All Templates**.

2. Select the template and select **Details** from the menu bar or right-click menu. To change the information, click **Edit**. You can change the name, author, and descriptions. To delete the image used for the template, click ⊗ on the image and click **Yes**. To change the icon, click ↻. Find the image you want to use or click **Upload** to upload an image stored locally. The image should be 50x50 pixels. Smaller images might appear distorted and larger ones might affect performance.

3. To view the folders and files associated with a template, select the template and select **Open** from the menu bar or the right-click menu. To add or change support files for the template, click **Upload** to upload a file stored locally.

4. Click **Save** to save any text changes. Image and support file changes are saved automatically.

5. To return to the list of templates, click **Templates** in the location menu.

Change Template Policies

If you're using site governance, you must make approved templates available to users so they can create sites. You do this by changing the template policies.

See Understand Site Governance.

> **✐ Note:**
>
> Only standard templates can be made available for site creation when using
> site governance. Site administrators can still create enterprise sites from the
> **Templates** page, but not from the **Sites** page.

To view or change template policies:

1. Click **Developer** and then click **View All Templates**.

2. Select the template and choose **Policies** from the menu bar or right-click menu.

3. To make the template available for users to create sites, change the switch from
   Draft to **Available**.

4. Select whether site requests created from this template require approval from the
   site administrator or if they are automatically approved.

5. Select the minimum security required for sites created from this template. Site
   creators can select a higher level of security for their site if desired.

   • **Specific service users** - Only selected users that can sign into this instance
     of Oracle Content and Experience Cloud can access the site. The site creator
     selects the Oracle Content and Experience Cloud users after the site is
     created. See Change Site Security.

   • **Specific cloud users** - Only selected users that can sign into your domain
     can access the site. The site creator selects the cloud users after the site is
     created. See Change Site Security.

   • **Service users** - Any user that can sign into this instance of Oracle Content
     and Experience Cloud can access the site.

   • **Cloud users** - Any user that can sign into your domain can access the site.

   • **Everyone** - Anyone can access the site without signing in.

6. When you're done, click **Save**.

Manage Templates

You can copy, rename, and delete a template folder like you would any other folder,
but a template has special considerations when you import or share them.

Open the Template page by selecting **Developer** and then **View All Templates**. Use
options on the menu bar or right-click menu on the Templates page to perform any of
these tasks.

Task	Description
Create a template	If you have a site that you want to use as a starting point for other sites, you can create a template from that site. **Note:** You must have the Downloader, Contributor, or Manager role for the site, and your administrator must enable the option. If you don't see the **Create** menu on the templates page, contact your administrator. On the templates page, click **Create**, then click **Create from existing site**. Select a site, name your template and click **Create**. See Create a Template from a Site.
View and edit template files	You can explore the folders and files that make up the template by selecting the template and choosing **Open**. If you're a web developer, you can download and modify individual template files or you can use the desktop app and synchronize the changes you make on your local system. You can also export the template package, which includes the associated theme and any custom components, and work with it offline in your preferred development environment. A template is represented by a folder structure that you can work with like other folders. When you export a template, all elements of the template, including a copy of the theme and any components, are collected in a template package that you can download and work with offline. See Developing Templates in *Developing for Oracle Content and Experience Cloud*.
Create a site	To create a site from a template, select the template and choose **Create Site**. See Create Sites without Site Governance.
Rename a template	Right-click the template you want to rename and choose **Rename**. Enter a name for the template that's different from any other template on the same server. For naming guidelines, see Create a Template from a Site.
Copy a template	You can create a template by copying an existing template and making changes to the copy. **Note:** When you copy a template, sharing information associated with the template isn't copied. Right-click the template you want to copy and choose **Copy**. Enter a name for the template that's different from any other template on the same server. For other naming guidelines, see Create a Template from a Site A progress bar shows the new template name and copy status.

Task	Description
Delete or restore a template	If you have the appropriate permissions, you can delete a template folder and its contents. When you delete a template, the template folder and all its associated folders and files are moved to the trash.
	You can delete or restore a template if you created the template (you're the template owner) or if someone has shared a template with you and has given you the contributor or manager role.
	Note: When you delete a template, the associated theme and custom components are not deleted.
	To delete a template, right-click the template you want to delete and choose **Delete**. You are prompted to move the template to the trash. A deleted template stays in the trash until: • You restore the template. • You permanently delete the template. • Your trash quota is reached. • The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days.
	To restore a template, click **Trash** in the Templates drop-down list, then select the template and choose **Restore** from the menu bar or the right-click menu.
Export or import a template	You can export a template to modify it offline and then import it either as a new template or to replace the existing template. You can also export a template to move it to another instance and import it there.
	When you export a template, you copy the template to a folder as a single .zip file. You can download the template package directly from the folder to unpack and work with the individual files. When you're done working with the files, create a .zip file containing the template package, import it, and overwrite the original template or create a new one.
	See Export and Import Templates.

Task	Description
Share a template or manage members	When you share a template with other Oracle Content and Experience Cloud users you assign a role that defines what the user can do with the template. You can share a template if you're the owner or if you're assigned the Manager role. ✏️ **Note:** Any of the roles you assign to a user give the user permission to create a site from the template. Some features of the template, such as the theme and custom components, aren't stored in the template, but are referenced from their associated locations in the online environment. For example, a template references the associated theme from the list of available themes in much the same way that a site references a theme. When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the Downloader role to ensure that they are available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components. Right-click the template you want to share, choose **Members**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can view the folders and files of the template, but can't change things. • **Downloader**: Downloaders can also download files and save them to their own computer. • **Contributor**: Contributors can also edit template details and template files, upload new files, delete files, and delete the template itself. • **Manager**: Managers can also add users and assign their roles. The creator of a template (the owner) is automatically assigned the manager role.
View or edit template details	You can modify template details, such as the description, icon, and support files by clicking the template name or by selecting the template and choosing **Details**. See Change Template Details.
Make template available for site creation or update template policies	If site governance is enabled, you can update template policies, such as template availability, required approval, and minimum security by clicking the template name or by selecting the template and choosing **Policies**. See Understand Site Governance and Change Template Policies.

Export and Import Templates

You can export a template to modify it offline and then import it either as a new template or to replace the existing template. You can also export a template to move it to another Oracle Content and Experience Cloud instance and import it there

Export Templates

When you export a template, you essentially copy the template to a folder in Oracle Content and Experience Cloud as a single .zip file. You can download the template package directly from the folder to unpack and work with the individual files. When you're done working with the template files, create a .zip file containing the template package and import it into your site and overwrite the original template or create a new one.

> **Note:**
>
> When you export a template, sharing information for the template isn't included.

To export a template:

1. Click **Developer** and click **View All Templates**.

2. Select a template and choose **Export** from the menu bar or the right-click menu.

3. Navigate to an existing folder or create a new folder by clicking **Create**, and providing a name and an optional description.

4. Choose a folder by selecting its checkbox and clicking **OK**.

Import Templates

> **Note:**
>
> If you import a template to a different server, some links in the default site may not be valid in the new server context. If the site uses reference links to images or other content rather than copying the content directly into the site, that content is not available on the new server. Even if you copy the content to the new server, the content will have a different internal ID, and the link will not be valid. When you import the template, you are notified of the pages that contain invalid reference links.

To import a template package:

1. Click **Developer** and click **View All Templates**.

2. Click **Create** and choose **Import a template package**.

3. If you've uploaded a template package, navigate to the folder that contains the template package and open the folder. If you haven't uploaded the template package yet, go to the folder where you want to upload it or create a new folder. Click **Upload** and then locate and select the template package and click **Open**.

4. To use a template, click the checkbox next to the template file name and click **OK**. New folders are created for the template, its associated theme, and any custom components. If the template, theme, or custom component names or IDs exist, you're prompted to resolve the conflicts. You may need to create a new template, theme, or component, or you can overwrite the existing items with the imported version.

Understand Themes

A *theme* defines the general look-and-feel—the overall style—of a site, including color scheme, font size, font type, and page backgrounds. Themes provide visual consistency between the pages in the site. You adjust the design and add content to create a site that sells your style, your brand, and your vision.
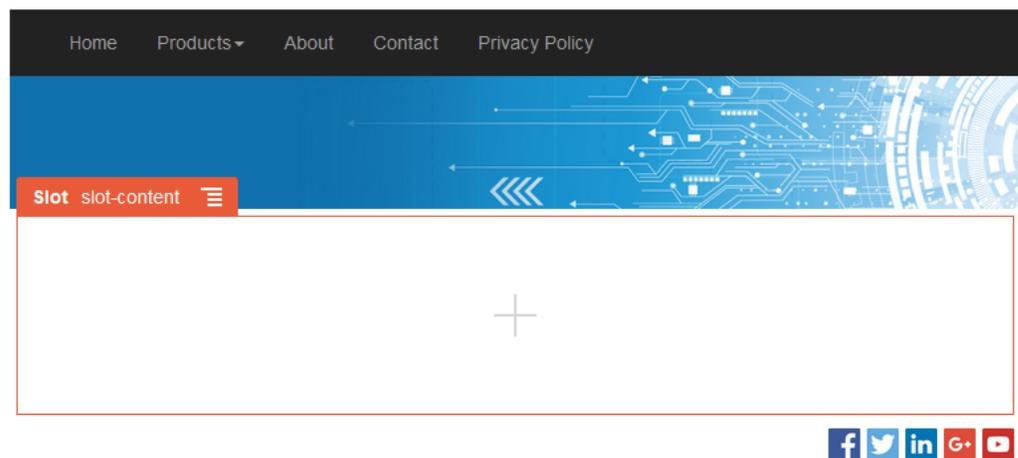
A theme includes:

• Page layouts

• Cascading style sheet (CSS)

• Variations on the style sheet

• Configuration files

• Background code that defines site navigation

Each website uses a theme. When you create the site from a template, you inherit the theme from the template. You can change the theme for a site at any time.

Oracle Content and Experience Cloud provides a number of templates with themes that you can use to get started. To create a new theme, copy an existing theme. You can download and modify the theme files, or you can use the desktop app and synchronize the changes you make on your local system. For information about other ways to create themes, see Developing Themes in *Developing for Oracle Content and Experience Cloud*.

Developers can also create a theme which uses a specific subset of components. When creating a site using one of these themes, you'll be shown only those components that are allowed with that theme. In this way, you don't have to worry about whether or not a component is valid for the theme you've chosen. You can still use any seeded components along with the themed components.

If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. Only the theme owner or a user with Manager privileges can explicitly publish a theme.

> **Note:**
>
> If you publish changes to a theme, all online sites that use the theme reflect the change. For example, if you change the default font in the theme and publish the theme, all sites using the theme will use the new default font.

Manage Themes

You can copy, rename, and delete a theme folder like you would any other folder, but a theme does have special considerations because they can be shared by more than one site.

You can see all themes by clicking **Developer** and then clicking **View All Themes**. You use options on the menu bar or the right-click menu on the Themes page to perform these tasks.

Task	Description
Create a new theme	To create a new theme, copy an existing theme. For information about other ways of creating themes, see Developing Themes in *Developing for Oracle Content and Experience Cloud*.
Copy a theme	You can create a new theme by copying an existing theme and making changes to the copy. > **Note:** > > When you copy a theme, sharing information associated with the theme isn't copied. Select the theme you want to copy and choose **Copy** from the menu bar or the right-click menu. Enter a name that isn't used by another theme. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. Click **Copy**. Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

Task	Description
Share a theme	If your administrator enabled sharing, you can share your theme with other Oracle Content and Experience Cloud users. You can share a theme if you're the owner or if you're assigned the Manager role. When you share a theme, you assign a role defining what the user can do with the theme. ✎ **Note:** When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the Downloader role to ensure that they are available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components. Right-click the theme you want to share, choose **Share**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can view the folders and files of the theme, but can't change things. • **Downloader**: Downloaders can also download files and save them to their own computer. • **Contributor**: Contributors can also edit the theme, upload new files, delete files, and delete the theme itself. • **Manager**: Managers can also add users and assign their roles. The creator of a theme (the owner) is automatically assigned the manager role.
Edit a theme	If you're a web developer, you can download and modify individual theme files or you can use the desktop app and synchronize any changes you make on your local system. You can also export a template package, which includes the associated theme and any custom components, and work with it offline in your preferred development environment. See Developing Themes in *Developing for Oracle Content and Experience Cloud*. If you make changes to a theme, you must publish the theme for those changes to be reflected by the sites using the theme.
Publish a theme	If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. You can publish a theme if you're the owner or if you're assigned the Manager role. Select the theme in the list and click **Publish** (or **Republish** for previously published themes) in the menu bar. If this is the first time the theme is published, a published icon ✅ is added next to the theme in the list. See Publish Themes.

Task	Description
Delete or restore a theme	If you have the appropriate permissions, you can delete a theme folder and its contents. When you delete a theme, the theme folder and all its associated folders and files are moved to the trash.
	You can delete or restore a theme if you created the theme (you're the theme owner) or if someone shared a theme with you and gave you the Contributor or Manager role.
	 ✏ **Note:** You can't delete a theme if it's used by any site.
	To delete a theme, right-click the theme you want to delete and choose **Delete**. You're prompted to move the theme to the trash. A deleted theme stays in the trash until: • You restore the theme. • You permanently delete the theme. • Your trash quota is reached. • The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days. To restore a theme, click **Trash** in the Theme page menu bar, then right-click the theme from the list and choose **Restore**.

Publish Themes

A theme defines the general look-and-feel of a site. You can update a theme to change the appearance of any sites using the theme.

If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. To publish changes to a theme, you must be the theme owner or have the Manager role.

> ✏ **Note:**
>
> If you publish changes to a theme, all online sites using the theme reflect the change. Make sure you tested your changes offline and that you understand the impact on the associated sites before you publish updates to a theme.

To publish a theme:

1. Click **Developer** and then **View All Themes**.

2. Select an existing theme from the list of themes.

3. Click **Publish** from the menu bar or the right-click menu.

4. Click **Confirm to proceed** and then click **OK**. If this is the first time the theme is published, a published icon is added next to the theme in the list.

7
Manage Custom Components and Layouts

As a developer, you can create and manage custom components and layouts. As a site contributor, you can register third-party components (apps) and component groups.

Custom components include component groups you create in the editor, and local and remote components you create using options described in this section. Custom layouts include *section layouts* for arranging components in a slot on a page and *content layouts* for arranging the fields in a content item.

- Understand Custom Components
- Understand Layouts
- Use Custom Components and Layouts
- Register Remote Components
- Create Local Components or Layouts
- Export or Import Components or Layouts

To learn how to use components with your site, see Arrange Page Content.

For information about using individual components, see Use Built-In Components.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

Understand Custom Components

Components are the individual parts of a web page. When you look at a web page, what do you see? You probably see a few titles, some paragraphs of text, and several links to other pages in the site. You might also see images, buttons, dividers, maps, and galleries. Each of these items is a component.

To add a component to a page, make sure that ![toggle]is set to **Edit**, click ![icon] and choose which type of component you want to use.

Drag the component from the panel and drop it into a slot on the page. That's it. Drag and drop titles, paragraphs, images, and other components where you want them on a page.

You can easily register and incorporate remote components (apps) and even create your own components using options in the component manager. Click **Developer** and then click **View All Components**.

Click **Create** and select the associated option to create a new local component or register a remote component. Components you create and share in this way are listed in the custom components panel in the editor.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

Remote Components

If you have a third-party component (app) that you want to use, just register it and use it in your site. It's that easy.

When you register a remote component, you specify the URL for the remote component itself and a second URL for any settings that a web author can specify for the remote component.

After you register a remote component, you can share it with other users. Any registered remote components that you own or that are shared with you are listed in the Custom Components panel in the site editor.

You can change the properties for a remote component within the editor the same way you do for any other component. Just click the menu icon and choose **Settings**. The **Custom** button opens the settings URL you specified when you registered the remote component.

> **Note:**
>
> Because remote components are hosted on a server other than the one hosting Oracle Content and Experience Cloud, they're enclosed in an inline frame (using an iframe element) for security purposes. Not all remote components can be enclosed in an inline frame. Check with the provider to find out if it can be enclosed.

Local Components

Developers can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud. You can insert the component directly into the page or enclose it in an inline frame with the iframe element.

When you click **Create** to create a local component, a fully-functional sample component is added to the list of components with a name you specify and a unique identifier. As a developer, you can modify the sample to create your own solutions.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

Understand Layouts

A page layout arranges slots and content on a page. A section layout arranges content within a slot. A content layout arranges the fields in a content item.

In general, a layout specifies the presentation of content, but not the content itself. Separating the content from its presentation makes it easier to present the same content in different ways or to change the presentation without having to touch the content.

Page Layout

When you add a page to a site, you select a layout to use for that page. Each layout has areas on the page, called slots, where a contributor can drag and drop content. A

page layout defines the number and position of slots on the page. A layout can also include content that is predefined and positioned on the page. This content can be static and not editable, such as a company logo, or it can be minimally editable, such as heading text that a contributor can change, but the position or appearance of which they can't.

Page layouts are stored in the theme. Themes can have one or more page layouts. As a developer, you can copy and modify an existing theme to create a new theme. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.
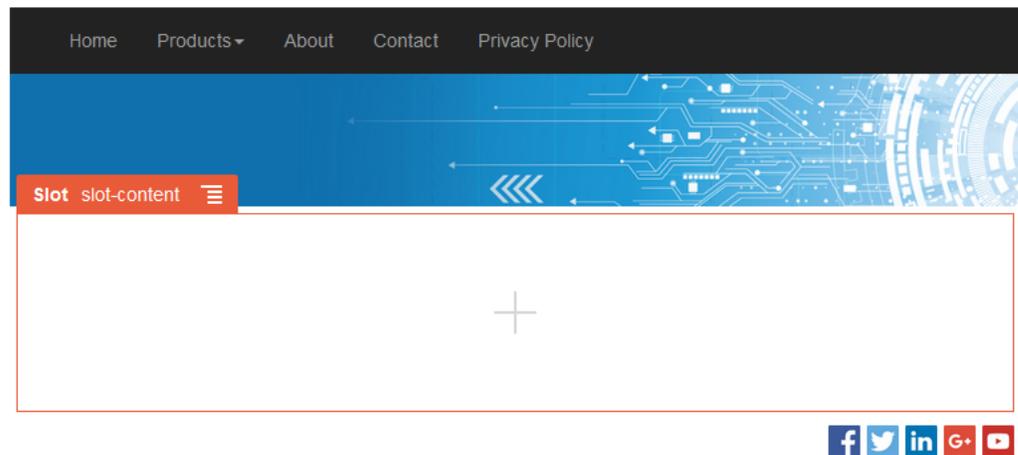
Section Layout

A section layout automatically organizes content added to it, making it easy for a contributor to add content without spending time formatting it on the page. For example, a section layout can automatically organize content into multiple columns or into a vertical list. A site contributor can add one or more section layouts to a slot to organize content.
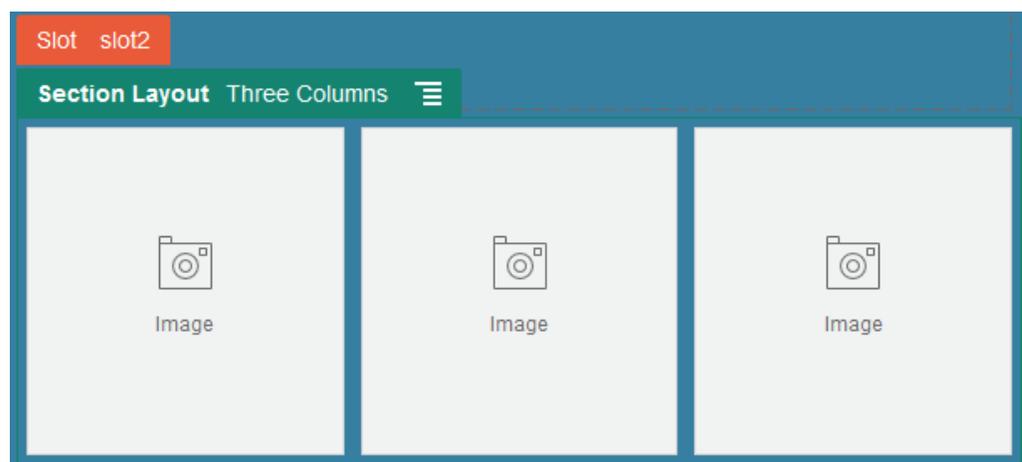
In addition to the layouts provided, a developer can create additional section layouts to solve particular layout problems or to simplify authoring for contributors. A theme designer can even build section layouts into a slot in a page layout. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.

Content Layout

If you are an enterprise user, you can create and use content items based on content types and layouts provided for you. Content structured in this way makes it possible for you as a contributor to assemble the content for a content item outside of the site editor. Multiple content layouts associated with the content type make it possible for the site designer to display the content item in different contexts without having to touch the assembled content. As a developer, you can create new layouts from the default layout provided. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.
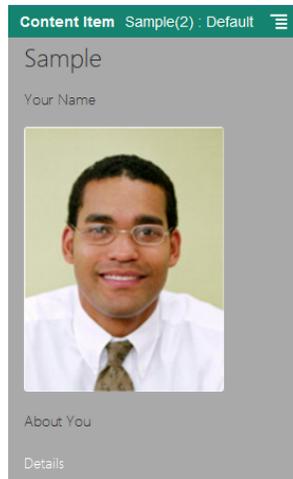
Use Custom Components and Layouts

As a developer, you can create and manage custom components and layouts. As a site contributor, you can register third-party components (apps) and component groups.

Custom components include component groups you create in the editor, and local and remote components you create using options described below. If you have a third-party app (remote component) that you want to use, just register it and use it in your site. Developers can also create local components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud.

Custom layouts include *section layouts* for arranging components in a slot on a page and *content layouts* for arranging the fields in a content item.

Use options on the menu bar or right-click menu on the Components page to perform the following tasks.

Task	Description
Register a remote component	When you register a remote component, you specify the URL for the remote component itself and a second URL for any settings that a web author can specify for the remote component.
	Before you can create a component, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.
	Click **Create** and select the associated option to register a remote component. See Register Remote Components.
Create a local component or layout	When you create a local component or layout, you are given a fully-functional sample component or layout that you use as a basis for creating your own component or layout.
	Before you can create a component or layout, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.
	Click **Create** and select the associated option to create a new local component or layout. See Create Local Components or Layouts.
	For information about other ways to create components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.
Copy a component or layout	You can create a new component or layout by copying an existing component or layout and making changes to the copy.

> **Note:**
>
> You can't change the name of a component or layout after you create or register it. You can copy a component or layout and specify a different name for the copy. All the other registration information, including the key value for remote components, are preserved. Sharing information is independent from registration information and isn't copied.

| | Right-click the component or layout you want to copy and choose **Copy**. Enter a name and click **Copy**. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. |

Task	Description
Share a component or layout	You can share your component or layout with other Oracle Content and Experience Cloud users. You can share a component or layout if you're the owner or if you're assigned the Manager role. When you share a component or layout, you must assign a role to the user defining what the user can do with the component or layout. Right-click the component or layout you want to share, choose **Share**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can see and use the component or layout in the list of custom components and layouts in the editor. They can also view the folders and files of the theme, but can't change things. • **Downloader**: Downloaders can also download files and save them to their own computer. • **Contributor**: Contributors can also edit the component or layout, upload new files, delete files, and delete the component or layout itself, provided it is not in use in a site. • **Manager**: Managers can also add users and assign their roles. The creator of a component or layout (the owner) is automatically assigned the manager role.
Edit a component or layout	If you're a web developer, you can download and modify individual component or layout files or you can use the desktop app and synchronize any changes you make on your local system. You can also export a component or layout individually or as part of a template package, which includes the any custom components and section layouts, and work with it offline in your preferred development environment. If you make changes to a component or layout, you must publish the component or layout for those changes to be reflected by the sites that use the component or layout.
Export or import a component or layout	You can export a component or layout to modify it offline and then import it either as a new component or layout or to replace the existing component or layout. You can also export a component or layout to move it to another instance and import it there. You can export a component or layout individually or as part of a template package, which includes any custom components and layouts. When you export a component or layout, you copy the component or layout to a folder as a single .zip file. You can download the component or layout package directly from the folder to unpack and work with the individual files. When you're done working with the component or layout files, create a .zip file that contains the component or layout package, import it, and overwrite the original component or layout or create a new one. See Export or Import Components or Layouts.
Publish a component or layout	If a site uses a new, unpublished component or layout, the component or layout is automatically published with the site when you place the site online for the first time. If you make changes to a component or layout and want to update online sites to show the changes, you must explicitly publish the component or layout. You can publish a component or layout if you're the owner or if you're assigned the Manager role. Select the component or layout in the list and click **Publish** (or **Republish** for previously published components or layouts) in the menu bar. If this is the first time the component or layout is published, a published icon ✅ is added next to the component or layout in the list.

Task	Description
Delete or restore a component or layout	If you have the appropriate permissions, you can delete a component or layout folder and its contents. When you delete a component or layout, the component or layout folder and all its associated folders and files are moved to the trash.
	You can delete or restore a component or layout if you created the component or layout (you're the component or layout owner) or if someone shared a component or layout with you and gave you the Contributor or Manager role.

> **Note:**
>
> You can't delete a component or layout if it's used by any site or update, including sites or updates in the trash.

To delete a component or layout, right-click the component or layout you want to delete and choose **Delete**. You're prompted to move the component or layout to the trash. A deleted component or layout stays in the trash until:
- You restore the component or layout.
- You permanently delete the component or layout.
- Your trash quota is reached.
- The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days.

To restore a component or layout, click **Trash**, then right-click the component or layout from the list and choose **Restore**.

Register Remote Components

To use a remote component in a site, you must first register it in Oracle Content and Experience Cloud.

You can register third-party remote components and remote components that you developed.

> **Note:**
>
> Before you can register a remote component, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.

To register a remote component for use in Oracle Content and Experience Cloud:

1. Click **Developer** and then click **View All Components**.

2. Click **Create** and choose **Register Remote Component**.

3. In the Register Remote Component window, enter or select information including:

   • **Name**: Name of the component that users will see.

   • **Description**: Description of the component that users will see.

- **Component URL**: The end point used in an iframe to render component content in a page. It must be HTTPS.

- **Settings URL**: The end point used in an iframe to render the settings of a remote component added to a page. It must be HTTPS.

- **Settings Width**: Sets the default width of the component settings panel in pixels.

- **Settings Height**: Sets the default height of the component settings panel in pixels.

- **Key**: A 192–bit AES key associated with the remote component and used to create a signed hash token when the component is provisioned. It's used to encrypt and ensure component settings are read and written securely.

4. Click **Register**.

   When the remote component is created, the name appears in the list of components. You can explore the files used to register the component by clicking the component name in the list of components.

The component registration information is stored in the catalog used by sites created in the same Oracle Content and Experience Cloud instance, but the component remains a remote service.

As the component owner, component icon is added to the Custom Components panel in the editor with the name you assigned to the component. You can share the component with other users and they will see the component in the Custom Components panel in the editor.

Create Local Components or Layouts

As a developer, when you create a local component or layout, you are given a fully-functional sample that you can modify to your own component or layout.

Before you can create a component or layout, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.

As a developer, you can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud.

To create a sample local component or layout:

1. Click **Developer** and then click **View All Components**.

2. Click **Create**, and select the type of component or layou you want to create.

3. Enter a name for the component or layout. You can't use a name used by another component or layout.

   You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with an underscore.

   Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

4. Optionally, enter a description for the component or layout.

5. For local components, you can choose to insert the component directly into the page or select **Create a component that renders in an iframe** to enclose the component in an inline frame (using an iframe element).

6. Click **Create**.

   A progress bar shows the creation status. When the component or layout is created, the name appears in the list of components. You can explore the folders and files that make up the component or layout by clicking the component or layout name in the list of components.

7. To select an icon other than the default icon assigned to the component or layout:

   a. Select the component or layout from the list.

   b. Click **Properties**.

   c. Click the **Component Logo** tab.

   d. Click a logo from the gallery of logos and then click **Done**.

For detailed information about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

After you have customized your component or layout, you can share it with others so they can use it in the following ways:

- Custom Component: When you use the site editor, the component icon is added to the Custom Components panel in the editor with the name you assigned the component.

- Section Layout: When you use the site editor, the section layout icon is added to the Section Layouts panel in the editor with the name you assigned the layout.

- Content Layout: A content administrator can assign the layout to one or more content types, either as the default view or added to a list of layouts that a site designer can select in the site editor to specify how a content item of that type is displayed on the page.

Export or Import Components or Layouts

You can export a component to modify it offline and then import it either as a new component or to replace the existing component. You can also export a component to move it to another Oracle Content and Experience Cloud instance and import it there.

Exporting

When you export a component, you essentially copy the component to a folder in the Oracle Content and Experience Cloud as a single .zip file. You can download the component directly from the folder to unpack and work with the individual files. When you are done working with the component files, create a .zip file that contains the component folders and files, import it, and overwrite the original component or create a new one.

> **Note:**
>
> When you export a component, sharing information for the component isn't included.

To export a component:

1. Click **Developer** and then click **View All Components**.

2. Select a component or layout and choose **Export** from the menu bar or the right-click menu.

3. Navigate to a folder or create new folder by clicking **New**, providing a name and an optional description, and clicking **Create**. To open a folder, click the folder icon or the folder name.

4. Select a folder by clicking the checkbox for the associated folder and click **OK**.

   A component or layout package file is created in the selected folder with the component or layout name and a .zip extension.

Importing

Before you can import or create a component or layout, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.

To import a component or layout:

1. Click **Developer** and then click **View All Components**.

2. Click **Create** and choose **Import component**. Choose this option to import a component, a section layout, or a content layout.

3. If you uploaded the component or layout package, navigate to the folder that contains the component or layout and open the folder. If you haven't uploaded the package yet, go to the folder where you want to upload the component or layout or create a new folder. Click **Upload**, then find the component or layout package and click **Open**.

4. Click the checkbox next to the component or layout file name and click **OK**. A new component or layout is created and added to the component list. If the component or layout name or ID already exists, you're prompted to resolve the conflicts. You may need to create a new component or layout or you can overwrite the existing component or layout with the imported version.

8

Edit Sites

Let's get to know the editor a little and see what you can do with it.

- Quick Tour of the Site Editor
- Understand Site Updates
- Use an Update
- Publish Updates
- Editing Tips and Tricks
- Use Styles and Formatting
- Work with Tables
- Upload Site Files

Quick Tour of the Site Editor

When you edit an existing update or create an update for a site, the update opens in the site editor. Take a minute to become familiar with the layout of the page and the tools available.
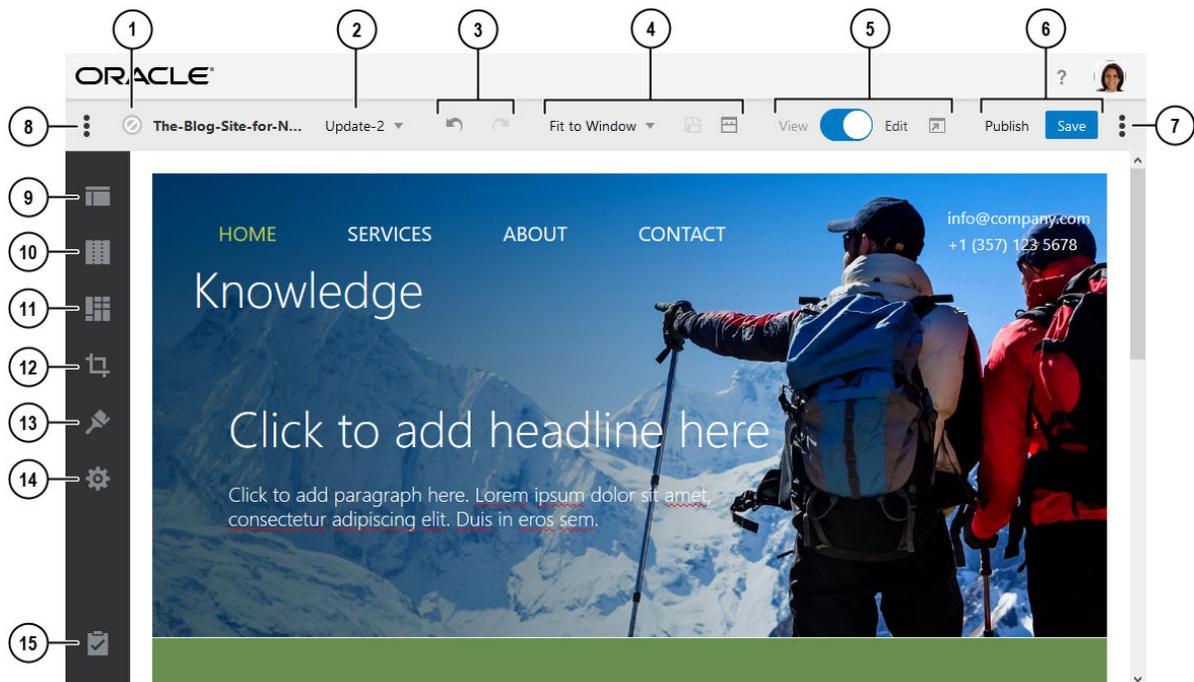
Here are a few things to note:

- Check the **status (1)** to see if the current site is currently online ✅ or offline ⊘.

- Check the **update (2)** for the name of the update you're currently working on. If there's more than one update available, you can switch to a different update.

- Use **Undo (3)** to reverse the last edit or change you made in the editor. Use **Redo (3)** to reapply the most recent change you reversed using undo. You can use undo multiple times to reverse a series of changes in the current update including changes in content, style, and page organization.

- Use the **preview options (4)** to see how the content will look under different circumstances. You can navigate to any page and see the base site with the changes from the current update applied. Click **Fit to Window** and choose a dimension to view the page as it will appear on a device with that screen size.

  Several sizes are given and you can create your own device size. Click 🖵 to see markings. Click an interval on the ruler to quickly see how the site appears at different sizes. You can also select 🖼 to see how a site will appear on a mobile device depending on orientation. Themes with a responsive design automatically arrange page content for the best use on the selected screen size.

  > **Note:**
  >
  > Links to site pages don't work in preview mode.

- Use the **switch (5)** at the top of the page to alternate between preview ◯ and edit ◉. Click ↗ to preview the site. This shows the page as it will appear to your site visitors, without slot and component borders and other visual aids used while editing. You can use the links on the pages to move around the site, including links in navigation menus, links in text, and so on. Links to other sites open in a new window for security purposes. Links to pages in the current site open in the same window or a new window depending on link target you specify.

- Use the available **options (6)** to process your changes. Click **Publish** to merge your changes directly to the online or offline **site**, or click **Save** to save your changes to the **update**.

- Click the **conversation panel icon (7)** to show (or hide) the conversation panel, where you can create or participate in a discussion about this site. See Use Conversations in *Managing Content with Oracle Content and Experience Cloud*.

- Click the **sidebar icon (8)** to show (or hide) the tools in the sidebar.

  > **Note:**
  >
  > You must set ◉ to **Edit** before you can use the tools in the sidebar.

- Click an **icon (9–15)** in the sidebar to manage pages, add components, change the theme, and more.

Callout	Click...	To...
9		Edit and add pages, manage nested page structures, reorganize pages, and change page settings.
10		Add section layouts, such as horizontal or vertical layouts.
11		Add assets to your site. You can select any assets that are in the repository that was selected when the site was created.
12		Insert components into your site. You can choose from different types of components, such as themed, custom, seeded, or see all available components.
13		Select a different theme for the site or change the background for a page or slot.
14		Adjust the settings for the site, such as keywords for search engine optimization (SEO) and site redirects.
15		Return to the Sites page to manage your sites.

Understand Site Updates

An update is a named collection of changes to the current base site. The changes remain in the update until you publish them and permanently update the base site.

Each time you view or edit a site in the editor, you use an update. Any changes you make in the editor are part of that update. You can have one or more updates and you can continue to add changes to an update over time. Updates give you flexibility with how you manage edits to a site. For example, you can have several people working on their own updates for different parts of the site. You can review and modify individual updates, and when you're ready, you can publish updates to the base site.

You can organize updates in several ways:

- Page-specific changes in an update named for the page

- Changes made by a specific user in an update with the user's name

- Changes made on a given day or for a particular project milestone

> **Note:**
>
> An update shows the changes in that update against the base site. Although it's easy to switch between available updates within the editor, you can view only one update at a time. If there are multiple updates to a given page, you might not know if you have multiple changes to the same content area. To prevent conflicting changes on a page, target individual updates to specific pages or areas of the site.

When you publish the changes in the current update, the changes are made to the base site and the update is deleted.

- For an *offline* site, updates are merged with the base site. Offline sites are visible only in the editor.

- For an *online* site, updates are merged with the base site and the online site is updated immediately. Online sites are visible to anyone with access to the site. You must be the site owner or have the Manager role to publish changes to an online site. Be careful when publishing an update to an online site. Your changes are immediately visible to anyone with access to the site.

To edit a site:

1. Select the site in the list and choose **Open** from the menu bar or the right-click menu.

2. The editor opens in preview mode. To make changes or to use the navigation options in the sidebar, make sure the Edit switch is set to **Edit**.

3. If this is the first update for a site, enter a name for the update and an optional description, then click **OK**. You can use letters, numbers, underscores (_), and hyphens (-) in the name. If you enter a space, it's automatically replaced with a hyphen. If you already have updates to the site, select an update from the list and click .

4. To edit a particular page, locate the page using the site tree in the left sidebar or using the site's own navigation. To show the site tree, click on the left, then click .

5. Add and change page content as necessary. Select **Fit to Window** to use the layout options to see how the page will look on different devices and with different sizes. Several sizes are given and you can create your own device size. Click to see markings. Click an interval on the ruler to quickly see how the site appears at different sizes. You can also select to see how a site will appear on a mobile device depending on orientation.

6. When you're done editing your site, save your changes in one of the following ways:

   - Click **Save** to save your changes to the current update. You can continue working in the current update or return to the update later.

   - Click **Publish** to apply your changes directly to the base site. If the site is online, changes you publish will be immediately visible on the online site.

When you publish the changes in the current update, the changes are made to the base site and the update is deleted. You must use an active update each time you view or edit a site in the editor, so you're returned to the site list where you can create a new update.

With an update, the process is linear:

- The original site (base site) exists. Let's call it Version 1.

- You create an update. When you merge the update (either with Apply or Publish), the update is permanently written to the existing site. You now have a new version (Version 2) of your base site.

- If you create and merge another update, then the update is permanently written to the existing site. You now have a new version (Version 3) of your base site.

With updates, remember that:

Current Base Site + A Merged Update = New Version of the Base Site

Use an Update

Each time you edit a site in the editor, you use an update. Any changes you make in the editor are part of that update.

To create and use an update:

1. On the Sites page, select the site, and choose **Open** from the menu bar or the right-click menu.

2. Set the Edit switch to Edit.

3. If this is the first update for a site, enter a name for the update and an optional description, then click **OK**. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. To use an existing update, click the update in the list.

4. The name of the site and current update are displayed in the top bar in the editor. If you have multiple updates, you can switch updates by selecting a different update from the list of updates.
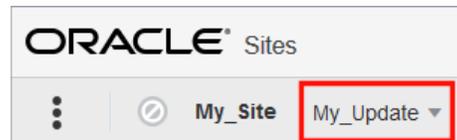
5. Add and change page content as necessary. Use different display size options to see how the page will look on different devices.

6. When you're done editing, click **Save**. When you're ready to merge your changes with the base site, you can publish the update.

Publish Updates

When you publish the changes in the current update, the changes are made to the base site and the update is deleted.

- For an *offline* site, updates are merged with the base site. Offline sites are visible only within the editor.

- For an *online* site, updates are merged with the base site and then the online site is updated immediately. Online sites are visible to anyone with access to the site. You must be the site owner or have the manager role to publish changes to an online site.

> **Note:**
>
> Be careful when publishing an update to an online site. Your changes are immediately visible to anyone with access to the site.

To publish an update:

1. To preview the changes in the current update, make sure the switch at the top of the page is set to preview ⬭ .

> **✎ Note:**
>
> Links to site pages don't work in preview mode.

2. When you're ready to make your changes permanent, click **Publish**. The changes in the current update are made to the base site and the update is deleted. You must use an active update each time you view or edit a site in the editor, so you're returned to the site list where you can create a new update.

Editing Tips and Tricks

Here are some things about the editor that will help you get started.

- Hiding or Showing the Sidebar
- Adjusting the Size and Spacing of Components
- Getting Around
- Drag and Drop Editing
- Components
- Editable Layout Content
- Styles and Formatting
- Undoing Your Changes

Hiding or Showing the Sidebar

Click ⁝ to show options for managing and editing pages and page content.

Set ⬭ to **Edit** to access the sidebar. Click ⁝ to hide the sidebar and increase your viewing area when you preview a page.

Adjusting the Size and Spacing of Components

You can adjust the size of many components, such as galleries or images, to different CSS units, as well as adjust the spacing around the component. For example:

- px (pixels): the default. If only a numeric value is specified, pixels is assumed.
- % (percent): sets the item to a percentage of its parent HTML element size. Example: 25%
- em: sets the size of the component in em-spaces. Example: 20em
- vw: sets the size as a percentage of the width of the viewing area and is responsive to the size of the viewing area. Example: 10vw

Getting Around

To select another page using the site tree, click [ ] in the sidebar. You can also use the site navigation or links on the pages themselves.

Any changes you make on a page are stored when you switch to another page. You can also click **Save** to save changes in the current update.

Drag and Drop Editing

To add a component from the sidebar, or to move a component on the page, click, drag, and drop the item to the location on the page. When you drag an item to the page, the boundaries of available slots and any existing items are shown. A placement bar [+] indicates where the new content can go (above, below, left, right):
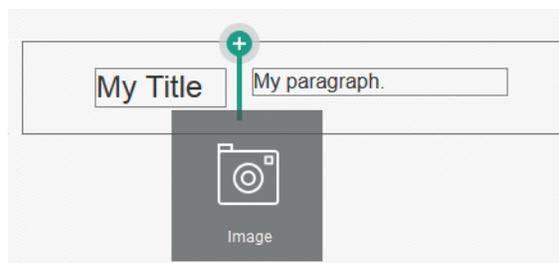
You can have multiple items in a slot and move items on the page just by dragging them to a new location. You can also adjust the relative width of two components in a slot by clicking and dragging the boundary between the two components. The component snaps to the next grid line indicated in the "ruler" displayed above the components.

The size of each component is displayed both in pixels and as a percent of the available space in the slot. To adjust widths to values other that those defined by the grid, press and hold the **Ctrl** key while you click and drag the component boundary.
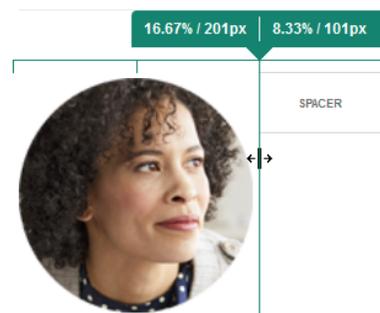
Components

After you place a component on the page, you can adjust the alignment, spacing, and other properties by selecting the item, clicking the item's menu icon [≡], and choosing **Settings**. If you click the component name instead of the menu icon, you can see and select the menu icon for the slot and component group (if the current component is

part of a component group). If you select one of the other tabs, you can see the menu icon and set properties for that element:

Slot

Component Group

Paragraph

Theme designers can specify which components are included with the theme, so some components available with one site may not be available with another. Theme designers can also specify which components are allowed in a given slot in a given page layout. If a component isn't allowed in a particular slot, the placement bar changes color and symbol (minus) and a message similar to the following is displayed:

This item is
not allowed in
this slot.

Spacer

Editable Layout Content

Theme designers can add "built-in" content to page layouts, such as copyright notices, that can't be changed in the editor. Theme designers can also designate simple text and image content as editable, including digital assets. This allows a contributor to change the text or image content, but not alter the location or other layout attributes. Editable text elements have a menu with options for specifying bold, italic, and underline text and for changing or removing a link:

B I U 🔗 ✂

Editable graphic elements have a settings icon and panel where you can specify an image, title, and alternate text.
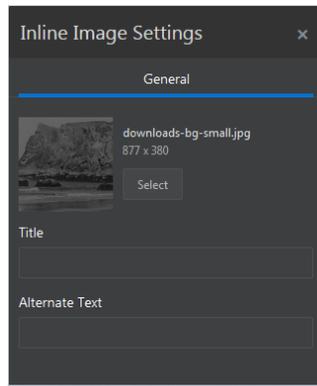
The frame that encloses the text or image adjusts to accommodate the length of the text or the size of the image.

> **Note:**
>
> The changes you make apply to the current page only. The original content is stored with the layout in the theme and is the default when the layout is first applied to a page.

Styles and Formatting

Most components have one or more base styles defined by the theme that specify aspects of the component's appearance. You can easily switch styles or override a style. To choose between available styles, open the component's Settings panel, click the **Style** tab, click **Choose Style**, and choose a style from the menu. To specify your own values for the properties specified in the style definition, click **Customize** and specify the formatting options.
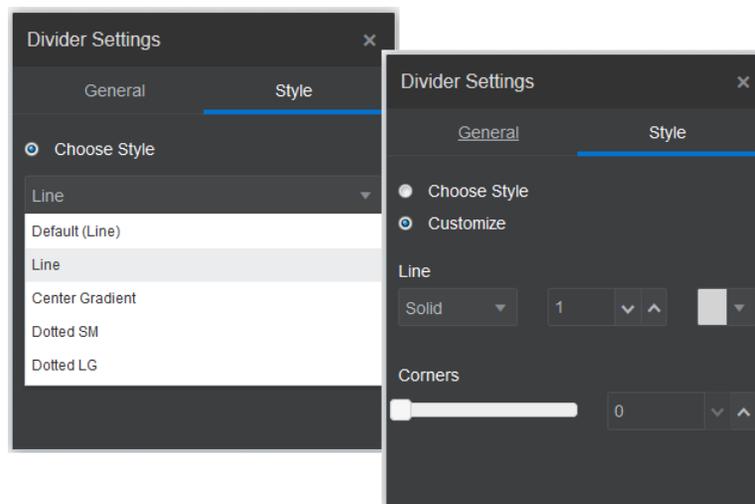
Undoing Your Changes

Use ↶ to reverse the last edit or change you made in the editor. You can use undo multiple times to reverse a series of changes.

Use ↷ to reapply the most recent change you reversed using undo. You can use redo multiple times if you have used undo multiple times in succession.

You can undo changes in content, style, and page organization in the current update. Some actions aren't included in the undo chain:

- If you switch to a different update, the undo chain is reset and you can't undo the changes made in the update you worked on earlier. Within an update, you can undo changes even after you save them.

- If you change views in the editor, such as switching pages or changing the size for a given page, you must manually reverse those types of changes.

- If you edit text components, such as titles or paragraphs, the text editor has its own undo chain. When you leave the text editor, you can no longer undo those changes.

Use Styles and Formatting

Most components have one or more base styles defined by the theme that specify aspects of the component's appearance. You can easily switch styles or override a style with options that you choose.

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. To set the base style for a component, click the component's menu icon ☰ and choose **Settings**. Click the **Style** tab.

   - To use a style from the site's theme, click **Choose Style** and choose the style from the menu. Styles are defined for individual components, so the list of styles may vary. For example, the styling for an image is different from that for a paragraph.

   - To specify your own base formatting options, click **Customize** and specify the formatting options.

3. To copy and paste the base style to one or more similar components, click the component's menu icon ☰ and choose **Copy** *component* **Style**. Click a similar component's menu icon ☰ and choose **Paste** *component* **Style**.

4. To format the text within a title or paragraph component, click in a text component. A tool bar with formatting options is shown. Select the text that you want to format, then select any of the options, such as font, color, or alignment. The changes you make are applied immediately. To remove the formatting, select the text and click ✎. Formatting changes are applied over the base style. If you change the base style, the overrides stay in place.

Work with Tables

Within a paragraph component, you can include tables that you create or that you paste from an existing HTML source.

1. Go to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page or click in an existing paragraph component.

3. To add a table from another HTML page, just click and drag to select the table, then copy and paste it into the paragraph component. To create a new table at the current cursor position, click ▦. Choose the number of rows, column, the width, and other formatting options. You can add an optional **Caption** centered above the table and an optional **Summary**, which gives additional context for assistive technologies such as automated screen readers.

4. Click **OK** when done to close the window. To change these table settings later, right-click in the table and choose **Table Properties**. To delete the table, right-click in the table and choose **Delete Table**.

5. To add, remove, or modify specific rows, columns, or cells, right-click in the row, column, or cell a choose from the menu of options. For example:
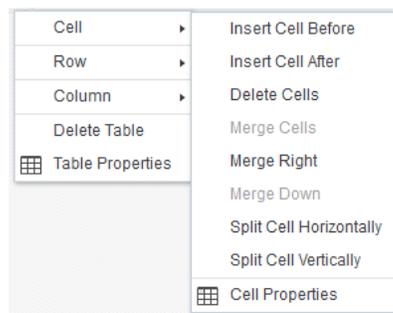
> **Note:**
>
> You can change cell properties for only one cell at a time.

6. You can merge and split cells to create complex table layouts. For example:

- To split a cell into two cells, right-click in the cell, choose **Cell**, and then choose **Split Cell Horizontally** or **Split Cell Vertically**.

- To merge two horizontal cells, right-click in the left cell, choose **Cell,** and then choose **Merge Right**.

- To merge two vertical cells, right-click in the top cell, choose **Cell,** and then choose **Merge Down**.

7. Use the general formatting menu options to changes the format and alignment of text within cells.

Upload Site Files

You can upload images and documents for use with your site at any time using the Oracle Content and Experience Cloud interface. You can also upload files from within the site editor when working with background images, and with image, gallery, and document components.

When you use image and document files with sites, you can use images stored with the site or in another location you can access. You can also use images that were shared with you or that you upload from a local or network file location.

Upload Files

To upload one or more files from a local or network location:

1. Click **Documents** and go to the location where you want to store the file. Click **Create** to add a new folder in the current location.

2. Click **Upload**.

3. Locate and select one or more files and then click **Open**.

Upload Files within the Editor

When working with background images or with components such as documents or images, you can upload files directly if the file you want to use isn't in an Oracle Content and Experience Cloud location.

For example, to upload one or more files from a local or network location to use with a gallery component:

1. To add images to a gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.

2. Click **Add Images**.

3. Go to the location where you want to store the file or click **Create** to add a new folder in the current location.

4. Click **Upload**.

5. Locate and select one or more files and then click **Open**.

6. Select one or more images in the repository and click **OK**.

> **Note:**
>
> The window displays all available files. Choose the file type that's appropriate for the context. For example, if you're choosing an image file, select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG). To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and referenced from the site.

9

Work with Site Pages

Let's create a page, choose a layout, and decide where the page goes in the site.

- Navigate to a Page
- View Pages
- Add Pages
- Move Pages
- Change the Page Layout
- Delete Pages
- Change the Background or Theme

Navigate to a Page

To view and navigate the hierarchy of pages:

1. Open a site for editing. Make sure that [image] is set to Edit.

2. Click [image] to show options for managing and editing pages and page content.

3. Click [image] to list the first level of pages.

4. Click a page to view the page. When you want to go to the top level page, click the top page heading.

   Pages with an arrow (>) have a nested layer of pages. Click the page to show the nested pages.

5. To view or change settings for a particular page, click [image] for that page.

View Pages

To view the pages in a site, open the site in the editor and use the different preview, size, and orientation options.

To change how you view pages while using the editor:

1. Open a site for editing.

2. Navigate to a page.

3. To preview the page in the editor, make sure that [image] is set to Preview. This shows the page as it appears to your site visitors, without the visual aids used while editing.

4. To preview the current update applied to the base site in a separate browser window, click ⬈.

> **✏ Note:**
>
> Links to site pages don't work in preview mode.

5. To preview the page as it appears on a device with a particular screen size, click **Fit to Screen** in the top menu bar and choose a set of screen dimensions from the list. Themes with a responsive design automatically arrange the page content for the best use on the selected screen size.
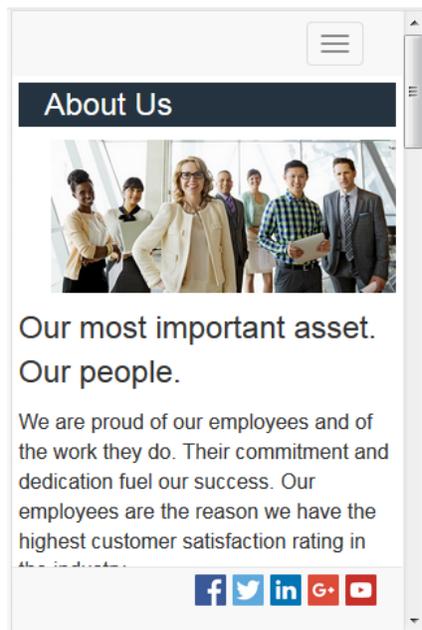
6. To create a custom size, click **Fit to Window** and choose **Create a device preset..**. Complete the necessary fields. To delete a custom size, click 🗑 next to the size. You can also activate the ruler 🗔 and select any interval on the ruler to quickly see different sizes.

7. To alternate the page orientation between portrait and landscape, click 🖿.
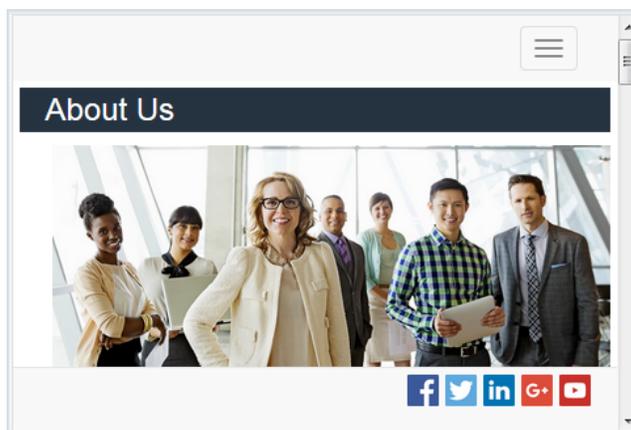
Add Pages

The pages in a site are structured in a folder-like hierarchy, or *site tree*. You can add a page, define settings for the page, and decide where the page goes in the site.

You can choose to add a page or add a link to an external page.

- **Web Page**: The page and content reside with the site. You name the page and define its content, specify where the page goes in the site, and specify how the page behaves in the context of the current site.

- **External Link**: The page is referenced from another location specified by a URL. You can name the page, specify where goes in the site, and specify how the page behaves in the context of the current site. Because you're using a page from a live site, you can't change the content of a linked page.

Add a Web Page

To add a web page to the site:

1. Open a site for editing.

2. Go to the page at the level in the site tree where you want to add the page. Pages are added at the current level, but you can easily move them to another location in the site tree.

3. Click **Add Page**. "New Page" is added to the bottom of the site tree and you're prompted to name the page and specify other settings.

4. Select **Web page** as the page type. Use this option if you want to manage the content on the page instead of reusing a page from another site.

5. Give the page a name. You can use letters, numbers, underscores (_), and hyphens (-).

   Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _sitesclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

6. Specify the page URL. By default, the page name is used for the page URL. Spaces are automatically replaced with hyphens. To use a URL other than the

default, click **Override** and add the file name used in the URL. You can use letters, numbers, underscores (_), and hyphens (-). Be sure to include a file extension. The default file extension is .html.

7. Choose a page layout. This defines the general structure of the page, but not the content. A layout contains one or more named *slots* where you can put content. The number and type of page layouts depends on the theme associated with your site.

8. Specify a page title. It doesn't show up on the page itself, but in the browser title bar or browser tab when the page displays. To add a title on the page, use the editor to add a title component.

9. Add an optional description. This description doesn't show up on the page , but lets you add information about the page for other contributors or for your own use.

10. Specify optional keywords separated by commas to help search engines identify the content of the page. Keywords are useful to identify terms or concepts that don't appear in the text of the page or that appear in images. The keywords don't appear on the page, but search engines use them to locate and identify your site. Good descriptions, keywords, and synonyms can increase traffic to your website.

11. Add an optional page header scripting or tags for analytics or tracking. Validate any code you use in the header or footer to make sure it works properly and doesn't introduce any security risks to your site.

12. Add an optional page footer scripting or tags for analytics or tracking. By default, the footer contains the text for pop-ups displayed regarding the use of cookies on the site with a link to the Privacy Policy. If you're a developer, you can edit the text that's displayed. Validate any code you use in the header or footer to make sure it works properly and doesn't introduce any security risks to your site.

13. Optional: You can use any of the available page options:

    • **Error page**: If an error prevents a requested page from displaying, show this page instead of the default error page.

    • **Hide page from navigation**: Don't include the page in the automatically generated navigation for the site.

    • **Detail Page**: Use this page to display detail information for a content item selected on another page. Structured content is available for enterprise users only. By default, when you select this option, **Hide page from navigation** is also selected. You can deselect the option if you do want the detail page to be included in the navigation.

      When structured content items are configured to use the detail page and a user clicks the link for more details on a structured content item, the detail page is displayed with detailed information for the content item.

    • **Search Page**: Use this page to display results from a search. You can select this page in the Link settings of a Content Search component. See Content Search.

14. Optional: Select a search engine optimization (SEO) option:

    • **Hide page from search engines**: Notify search engines not to index the content of the page so it doesn't show up in search results.

    • **Hide page links from search engines**: Notify search engines not to follow links on the page and consequently don't index the link destinations.

- • **Hide page descriptions from search engines**: Notify search engines not to include the description (specified above) after the page in the search results.

- • **Do not provide page image in search results**: Notify search engines not to include an image of the cached page in the web search results.

15. Optional: select if this page will have a Cobrowse button to use with browsing sessions. A cobrowse session uses Oracle Cobrowse Cloud Service to manage a screen sharing experience with a site visitor. See Using Cobrowse on a Page for details.

16. To save all pending changes in the current update, click **Save**.

Add a Linked Page

To add an external link page to the site:

1. Open a site for editing.

2. Go to the page at the level in the site tree where you want to add the page. Pages are added at the current level, but you can easily move them to another location in the site tree.

3. Click **Add Page**. "New Page" is added to the bottom of the site tree and you're prompted to name the page and specify other settings.

4. Select **External link** as the page type.

5. Give the page a name. You can use letters, numbers, underscores (_), and hyphens (-). The name is used in the site tree to identify the page. Spaces are automatically replaced with hyphens.

6. Specify the full URL to the page. For example: `https://www.example.com/sharedpage.htm`

7. If you want the page to open in a new browser window or tab, select **Open link in a new window**. If you don't select this option, the page opens in the current window, replacing your site page and navigation.

8. Optionally, select any of the available options:

- • **Error page**: If an error prevents a requested page from displaying, show this page instead of the default error page provided with the site.

- • **Hide page from navigation**: Don't include the page in the automatically generated navigation for the site.

- • **Hide from search engines**: Notify search engines not to index the content of the page so it doesn't show up in search results.

9. To save all pending changes in the current update, click **Save**.

In the site tree, a page that links to an external URL has before the page name.

Move Pages

You can drag and drop pages to another location in the current level of the site tree, or cut and paste a page to another level.

There's always a top page in the hierarchy, the "home" page for your site, and all other pages are listed beneath it. You can drag and drop pages at a given level to change their order. You can also cut and paste pages to another location in the hierarchy.

Pages can have nested pages. If you move a page with nested pages, the nested pages are also moved and remain nested beneath the moved page. If the theme you use includes automated navigation, changing the order of pages also changes the order in which they're listed in the navigation menus.

To move a page to a different location in the site tree:

1. Open a site for editing.

2. Go to the page you want to move.

3. To move a page to a different position in the current level of the site tree, click and drag the page name to a different location in the list of pages, then drop it.

4. To move a page to a different level of the site tree, click the page you want to move and click ⚙ for that page. Click ✂ to cut the page from its current location or ⧉ to leave a copy of the page in the current location. Go to the level where you want the page and click ⚙. If you select a page at that level, the pasted page will be nested under it. Click ⧉ to paste the page to the current location. To reorder the pages, drag and drop a page to another location in the current level of the site tree.

Change the Page Layout

A layout defines how content is arranged on the page. Different layouts can contain a different number of named *slots*, which is a region spanning the width of the page. A slot can contain one or more types of content.

Every theme has several page layouts. When you add a page to a site, you select a layout to use for that page. Each layout has slots where you can drag and drop content. What content goes into these slots is up to you. It can be anything from titles, text, and dividers to multimedia, galleries, and social media. You can arrange the content in a slot, but you can't change the number or arrangement of slots on the page. To do that, you have to use a new page layout.

> ✎ **Note:**
>
> You can swap one layout for another. Be careful though. If you choose a layout with fewer or differently named slots, existing content in other slots won't display in the new layout. The content isn't deleted, it just can't be displayed unless the layout you choose has a slot with the same name.

The following illustration shows a sample layout for a page. You can see the empty slot in the page layout and the completed page with title, image, and text added to the slot.
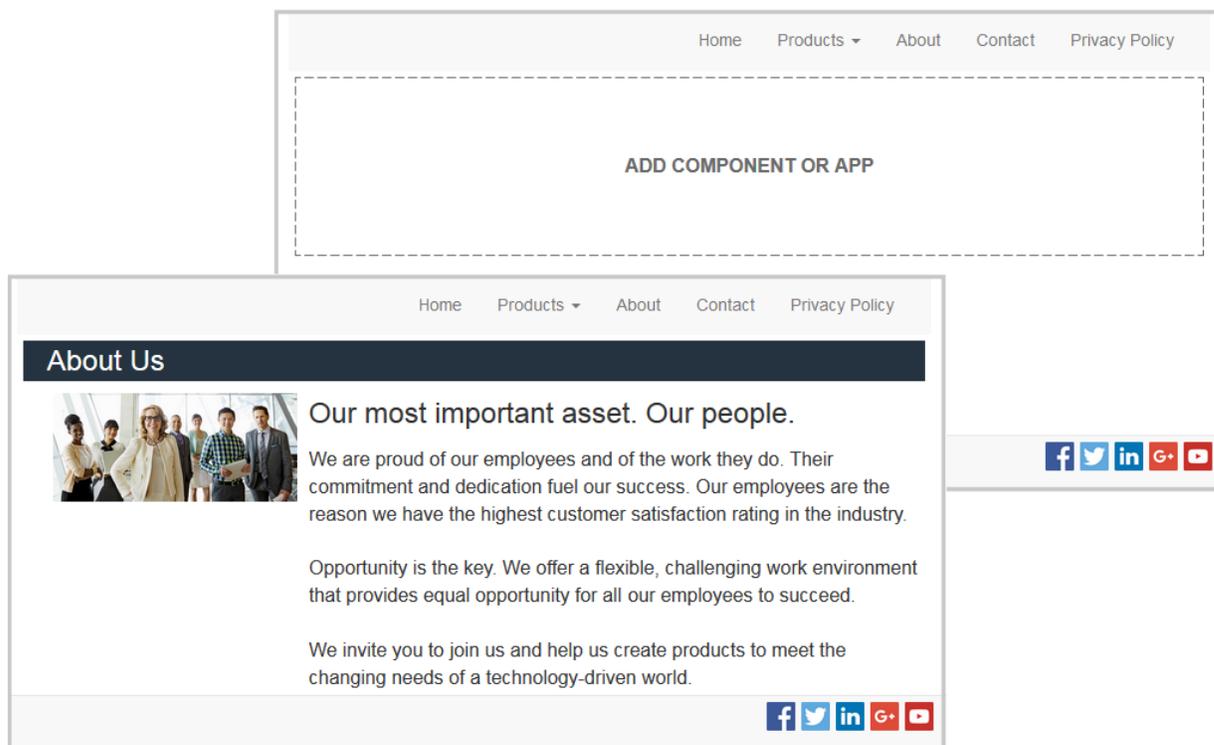
To select a different layout for a page:

1. Open a site for editing.

2. Navigate to the page and click .

3. Go to the Page Layout field and select a different layout from the menu. The number and type of page layouts depends on the theme associated with your site.

4. To save all pending changes in the current update, click **Save**.

Delete Pages

You can delete pages as part of an update.

A deleted page is recorded as part of an update when you click **Save**. The page isn't deleted from the base site until you publish the update. Anyone with the Contributor or Manager roles can delete a page.

> **✎ Note:**
>
> When you publish an update that deletes a page, the page is permanently deleted and can't be recovered. If managing page additions or deletions is a concern, you can isolate those actions using dedicated updates when adding or deleting pages from a site.

To delete a page from the site:

1. Open a site for editing.

2. Navigate to the page that you want to delete and click 🗑.

3. Click **OK** to confirm the deletion. Click **Save** to save all pending changes in the current update.

Change the Background or Theme

You can specify the background color and image for the page, for individual slots on the page, and for section layouts within a slot. You can also change the entire theme for a site.

A slot is a region that spans the width of the page and can contain one or more types of content. The background you specify for a slot applies to the entire slot and all the components in the slot.

Change the Background

Backgrounds layer on top of each other. If you specify a background for a slot, it sits "on top" of the background specified for the page. For most images and colors, the upper layer effectively overrides the lower layer. If you use a degree of transparency either in a background color or in images, the colors in lower layers can show through or blend with the colors used in upper layers.

Some components, like paragraphs and titles, can provide a background color as part of a predefined style or as a customized style. If you specify a background color for a component, it also layers on top of any section layout, slot, or page background. See Use Styles and Formatting.

The background options are similar for pages, slots, and section layouts, though you access them in slightly differently ways:

1. Open a site for editing.

2. Navigate to the page you want to edit and make sure that is set to **Edit**.

3. To change the background for a page or slot:

   • Click in the sidebar and then click.

   • To specify the background for the entire page, click **Complete Page** and click. To specify the background for a slot on the page, select the slot and click.

4. To change the background for a section layout:

   • Click the menu icon for the section layout and choose **Settings**.

   • Click **Background**. The background options are the same for pages, slots, and section layouts.

5. To use an image for the background, click **Select Image**. You can use images from any location you can access. You can also use images that were shared with you or that you uploaded from a local or network file location.

6. Select an image and click **OK**. The window displays all available files. Choose the file type appropriate for the context. For example, if you're choosing an image file, select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

7. To adjust the image settings:

    • Use **Position** to place the image on the page or in the slot.

    • Select a **Scale** option to adjust the presentation of the image:

        – **Fit**: The image is scaled so the entire image fits in the available space without distorting the image.

        – **Stretch**: The larger of the two dimensions (width or height) is scaled to fit the available space and the smaller dimension is stretched to fill the available space.

        – **None**: The image is used at its full pixel resolution and is cropped uniformly if it doesn't fit in the available space.

    • Select a **Repeat** option to tile an image that's too small to fill the available space. This option doesn't apply if you select **Stretch** as the **Scale** option.

    • Select **Do not scroll with page** to keep the image stationary while the user scrolls the page.

8. To select a color for the background, choose a color from the **Color** menu or click **More** to select a color from the complete range of colors.

    • Click in the spectrum bar on the right to choose a color and to display variations of the color in the color range display. The display shows the selected color in the upper right corner and shades of the selected color with increasing amounts of white toward the left and increasing amounts of black toward the bottom.

    • To select a variation of the color, click within the color range display or click and drag the selection point to a new color position. The current color box and the 6-digit color code show the selected color.

    • To adjust the transparency (alpha channel), click and drag the transparency slider to the left to increase transparency. An alpha value of 0% makes the color transparent, allowing color and content from lower layers to show through completely. An alpha value of 100% makes the color completely opaque, blocking out all color and content from lower layers. Other values allow images and colors from lower layers to show through and their colors to blend with those of upper layers to different degrees.

    • To apply the current color selection, click **Choose**.

Change the Theme

The change to the theme is recorded as part of an update when you click **Save**. The theme change isn't applied to the site until you publish the update.

> **✎ Note:**
>
> Not all themes are compatible with each other. Different themes can contain different navigation, style name, or page layout information. For example, if you choose a theme with different layout names, existing pages may use layouts that aren't available in the theme. Those pages appear blank. The page content isn't deleted, it just can't be displayed unless the theme you choose has a layout and slots with the same names. If you choose an incompatible theme, you can change the theme back to the original theme to restore the page content.
> Be certain you switch to a compatible theme. If you aren't sure, check with the theme developer.

To change the theme used for the site:

1. Open a site for editing.

2. Click in the sidebar and then click .

3. Select a theme from the list of available themes and click **OK**. The theme is applied in the current update. To save all pending changes in the current update, click **Save**.

10
Arrange Page Content

Components and content items provide the features and content your users want and section layouts let you arrange them automatically.

- Add Components and Section Layouts
- Work with Assets and Content Items
- Use Triggers and Actions
- Use Horizontal Section Layouts
- Use Vertical Section Layouts
- Use Two and Three Column Layouts
- Use Tabbed Section Layouts
- Use Slider Section Layouts

For information about using individual components, see Use Built-In Components.

To learn how to manage components and layouts, see Manage Custom Components and Layouts.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

Add Components and Section Layouts

Components are the individual parts of a web page. A *section layout* automatically organizes content added to it, making it easy for a contributor to add content without spending time formatting it on the page.

Add Components

To add a component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Click and then one of the following types of components:
   - Click **Themed** to show the list of components that were chosen to be used in the theme associated with the site.
   - Click **Custom** to show the list of custom components that were shared with you.
   - Click **Seeded** to show the list of default components available with the service.
   - Click **All** to show all components that were shared with you.

3. Click and hold a specific icon and drag it where you want it on the page. When you drag an item to the page, the boundaries of available slots, section layouts, and

any existing items are shown. A placement icon ⊕— or a vertical placement bar 📍 (put it to the left or right) indicates where the new content will go. A solid border around a section layout or content item indicates you can drop the item and it will be placed automatically. You can have multiple items in a slot and move items on the page just by dragging them to a new location.

4. When you're in the right location, drop the item onto the page.

5. To adjust the properties for an item, click the item's menu icon ☰ and choose **Settings**. Depending on the item, you'll need to add text, specify a link to an image, specify a URL to another site or a map, resize the item, or other actions.

Each component has settings such as size, alignment, spacing, color, and borders. These define how the component looks and acts. For example, paragraph settings include font type, font size and other features that determine how text is presented.

To adjust the properties of a component, select the component, and then click ☰ **Menu** and choose **Settings**. Different components have different kinds of settings:

Settings	Description
General	General settings include spacing, alignment, and settings that are common among components.
Style	A style is a named set of default values that govern appearance. Styles are defined in the theme. Different themes can have different styles, and within a theme, different components can have different styles. You can also manually specify style settings for a specific instance of a component.
Link	Link settings include the locations of images, documents or other resources used by the component. For buttons and other components that perform actions, link settings also include the triggers and actions supported by the component.
Components	Components that include other standard components, such as the article component, provide a list of the individual components and give you access to the settings for each of those components.
Custom	Custom settings are unique to the component and are presented separately from the standard setting groups. Remote components, for example, may store preferences at a unique URL and present them as custom settings.

Using Section Layouts

A section layout can automatically organize content into multiple columns, a vertical list, or a set of tabbed areas. A site contributor can add one or more section layouts to a slot to organize content. To add a layout to a page:

1. Navigate to the page you want to edit and make sure that 🔵 is set to **Edit**.

2. Click ▦ to insert a section layout on your page. Choose the type of layout you want to use and follow the same guidance for placing the item as you use for placing a component.
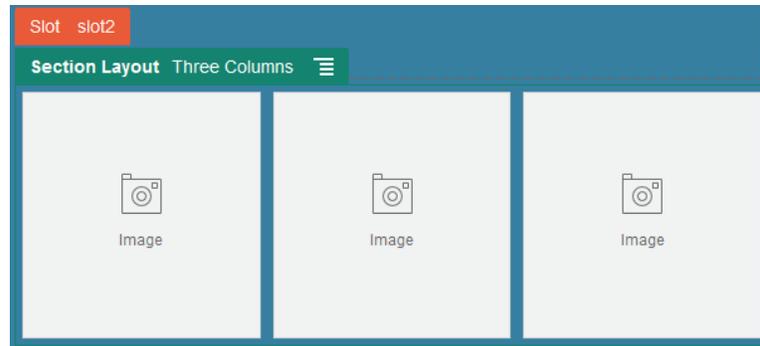
A placement icon ⊕━━ indicates where the section layout will go (above, below, left, right). A solid border around a section layout or content item indicates you can drop the item and it will be placed automatically:
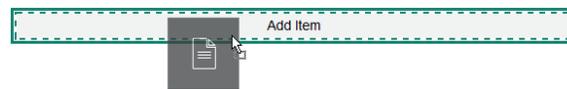
If you are an enterprise user working with structured content items, you can assign a section layout when you add a list of content items to a page and the section layout will automatically format the items on the page.

In addition to the layouts provided, a developer can create additional section layouts to solve particular layout problems or to simplify authoring for contributors. A theme designer can even build section layouts into a slot in a page layout. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.

Work with Assets and Content Items

If you are an enterprise user, your site can include digital assets and content items stored in a *site collection*. The collection is a subset of assets in a repository that can be used on the site.

To add a digital asset or content item from the site collection to a page, make sure that ⬤ is set to **Edit**, click ▦. You can filter your assets to find exactly what you need. Click ▼ and choose how you want to narrow your choices. See Sort and Filter Assets for complete details.

Drag the digital asset or content item from the panel and drop it into a slot on the page. You can embed images directly into a Paragraph component at a cursor location, with options to enter alternative text, set the image height and width, and set the alignment.

If you add an item from the site collection to a page, it is automatically placed in a component of the appropriate type. For example, if you add an image digital asset, it is automatically placed in an image component. If you add a content item, it is automatically placed in a content item component. Alternatively, you can add the image or content item component first and then drag the content item from the Content panel onto the component at a later time. Or you can select **Settings** for the component, then click **Select** to choose an image from your assets or from your documents list.

Use Triggers and Actions

Button components can initiate one or more actions such as showing or hiding page components and showing messages. Certain components, such as folder and file lists, can initiate actions in the companion component based on the selection a user makes.

For example, you can configure a button so that when the button is pushed (the trigger), the user is directed to another page or external URL and an alert is shown that notifies them of the change (the actions). The display you see will change depending on what kinds of components are also used.

If you use more than one action, consider the order of operation and put the actions in the order you want them performed. In the example above, list the alert action first. This will give the user time to read and dismiss the message before they are redirected to the page. If you list the redirect action first, the message may be replaced with the new page before the user has a chance to read it.

Page Actions

All components that support triggers and actions support page actions:

- **Navigate to Site Page**: Select a page on the current site.
- **Navigate to External URL**: Specify a full URL to an external page or site.
- **Show Alert**: Show a specified message in a window.
- **Show or Hide a Component**: Select a component from the list of components on the current page to show, hide, or toggle.
- **Show or Hide a Slot**: Select a slot from the list of slots on the current page to show, hide, or toggle.

Component-specific actions

In addition to page actions, components can define their own actions. These actions can allow a component to communicate with other components and initiate actions in a companion component. For example, when a user selects a folder in the folder list component, the file list component can display the files in the selected folder. In this case, the folder list component supports the **Folder Selected** trigger and the file list component supports the **Display Files** action.

When you add components that support actions to a page, the component and any actions they support are added to the list of available actions. Some components support only actions or certain actions. Some component provide triggers, but do not themselves support any actions.

To learn how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

For example, to specify one or more actions for a button component:

1. Click the button's menu icon ☰ and choose **Settings**.
2. In the Settings panel, click **Link**.
3. Click **Select Link Type** and choose **Trigger Actions**.
4. Under Available Triggers, click **Click on Button**.
5. In the Configure Trigger Action window, click and drag an action from the column on the left and drop it on the slot labeled **Do something**.

Use Horizontal Section Layouts

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

A horizontal layout arranges the items added to it one after the other in a horizontal line. The layout changes proportionally as the page width is increased or decreased. By default, items are fit into one line and are allocated equal horizontal space.

To add a layout to a page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.
2. Add the layout to the page.
3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts.

The following is a horizontal layout with numbered text components to show the sequence of items in the layout:
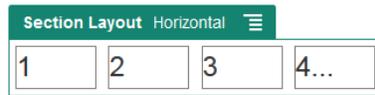
4. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can set the width for individual areas if you don't want to use the default proportional sizing. You can also set the alignment (left, center, or right).

5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.

6. Use the Background tab to modify background settings for the layout.

   See Change the Background or Theme.

Use Vertical Section Layouts

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

A vertical layout arranges the items added to it one after the other in a vertical line.

To add a layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the layout to the page.

3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts.

The following is a vertical layout with numbered text components to show the sequence of items in the layout:
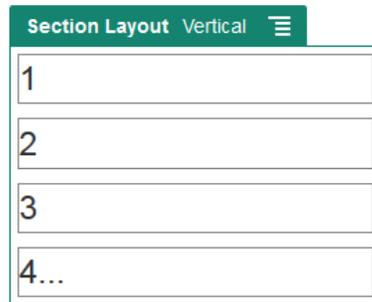
4. To edit the component and its appearance, click its menu icon , and choose **Settings**.

5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.

6. Use the Background tab to modify background settings for the layout.

Use Two and Three Column Layouts

You can use a multi-column section layout to automatically determine the spacing and arrangement of components you add to the layout.

To add a layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the layout to the page.

3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.
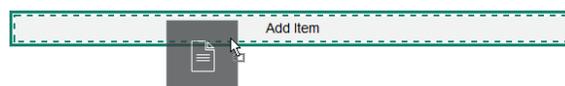
You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts or add component groups.

The following is a two-column layout with image components as placeholders:

If you add more items, they are shown in additional rows, each with a maximum of two items.

4. To edit the component and its appearance, click its menu icon , and choose **Settings**.

5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.

6. Use the Background tab to modify background settings for the layout.

7. Choose **Custom Settings** to set additional defaults for the content that's displayed.

   • **First Column Width (%)**: Specify the column width as a percentage of the space available to the layout.

   • **Second Column Width (%)**: Specify the column width as a percentage of the space available to the layout.

   • **Third Column Width (%)**: Specify the column width as a percentage of the space available to the layout.

   • **Responsive Breakpoint (in pixels)**: For responsive page designs that automatically reformat the content when the available display size varies, specify the width in pixels where the section layout switches between the standard two-column layout and the **Responsive Behavior** options you specify below.

   • **Responsive Behavior**: Select how the layout changes when the available display size is smaller than the **Responsive Breakpoint** value.

     – **No Action**: Do not adjust the layout behavior.

     – **Stack the columns**: Arrange the items from top to bottom in a single column with all items from column one, followed by items from column 2, and so on.

     – **Hide the first column**: Hide the content in the first column to provide more space for the remaining columns.

     – **Hide the second column**: Hide the content in the second column to provide more space for the remaining columns.

     – **Hide the third column**: Hide the content in the third column to provide more space for the remaining columns.

     – **Hide both columns**: Hide all the content in the layout.

- **Move the second column under the first column**: Arrange items in a single column with all items from column one followed by all items from column two.
- **Move the first column under the second column**: Arrange items in a single column with all items from column two followed by all items from column one.

Use Tabbed Section Layouts

You can use a tabbed section layout to create spacing and arrangement of the components you add into the layout.

To add a layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.
2. Add the layout to the page. By default, a single tab is added with the layout. Click **New Tab** to add additional tabs.
3. To place other content in a tab, drag and drop the content onto the tab.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts or add component groups.
4. To edit a tab and its appearance, click its menu icon , and choose **Settings**.
5. Use the Background section to modify background settings for the tab.

   You can use an image for the tab, change its position, and so on. See Change the Background or Theme.
6. Use the Style section to modify other appearance settings for the tab. Choose a style, such as hairline, frame, and so on, or customize the border and the corners for the tab.

Use Slider Section Layouts

You can use a slider section layout to create content that remains in place until it is "slid" to one side, making room for new content. Users navigate through the slides by clicking the navigation dots under the slide section.

To add a slider layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.
2. Add the layout to the page. By default, a single slide is added with the layout. Click **New Slide** to add additional slides.
3. To place content on a particular slide, display the slide in the slider, then drag and drop the component or content item onto the slide.

   You can continue adding items to the slide and positioning them as needed. You can add other section layouts to create sophisticated layouts or add component groups, letting you position content where you want.

4. To edit a slide layout and its appearance, click its menu icon ▤, and choose **Settings**.

5. Use the Background section to modify background settings for the entire slide area.

   See Change the Background or Theme. You can use an image, change its position, and so on.

6. Use the Style section to modify other appearance settings. Choose a style, such as hairline, frame, and so on, or customize the border and the corners for the slide.

7. To modify settings for each individual slide, click the name of the slide to open its settings. Change the background, style, and so on for each slide as needed.

11

Use Built-In Components

Components, section layouts, digital assets, and structured content give you the flexibility to provide the content and features your users want.

This section provides information about using individual components. For other information about components, see the following:

- To learn how to use components in your site, see Arrange Page Content.
- To learn how to manage components, see Manage Custom Components and Layouts.
- To learn how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud* .

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Basic Components

Basic components provide the building blocks for text content.

- Titles
- Paragraphs
- Plain Text
- Buttons

Titles

To add and format a title component:

1. Navigate to the page you want to edit and make sure that ![toggle] is set to **Edit**.
2. Add the component to the page.

3. Click in the title component to enter the title text. The text takes on the formatting of the default style for the component.

4. To add a link within the title text:

   a. Enter and select the text you want to use as the link text, then click .

   b. Click **Select Link Type** and choose one of the following options:

      • **Web Page**: Specify a full URL to an external page or site.

      • **Site Page**: Select a page on the current site.

      • **File Download**: Download a selected file from the repository. Select a file.

        If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

      • **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

      • **File Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

      To remove a link, click anywhere in the link text and click .

5. If you want to change the default formatting, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

   Changes you make are applied immediately. These formatting changes are applied over the base style. If you change the base style, the overrides remain in place.

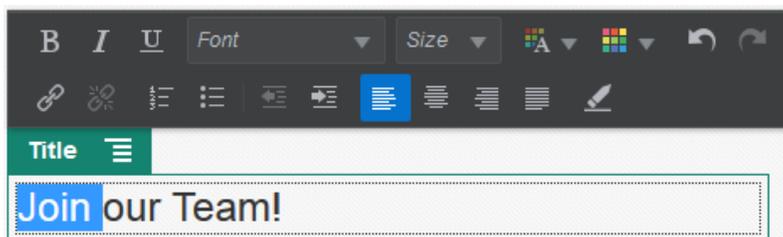6. To remove the formatting applied with these options, select the text and click .

Paragraphs

To add and format a paragraph component:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. Click in the paragraph component to enter the text. The text takes on the formatting of the default style for the component.

4. To add an image, click ![image icon] and select the image to use. You can select from your documents or your Digital Assets. Adjust the settings for the image as needed.

5. To add an additional paragraph within a paragraph component, just press Enter.

6. To add a link within the paragraph:

   a. Enter and select the text you want to use as the link text, then click ![link icon].

   b. Click **Select Link Type** and choose one of the following options:

      • **Web Page**: Specify a full URL to an external page or site.

      • **Site Page**: Select a page on the current site.

      • **File Download**: Download a selected file from the repository. Select a file.

        If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

      • **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

      • **Lightbox Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

      To remove a link, click anywhere in the link text and click ![remove link icon].

7. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

Changes you make are applied immediately. These formatting changes are applied over the base style. If you change the base style, the overrides remain in place.

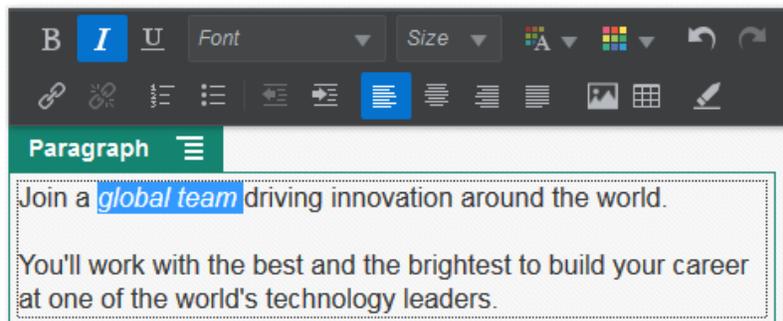8. To remove the formatting applied with these options, select the text and click ![remove formatting icon].

Plain Text

The text component lets you add text to the page and format it exclusively using styles defined in the theme. The formatting tool bar is not available when editing the content, so you can't override the selected style with custom formatting.

This can be useful if you use standardized formatting for elements such as headings. You can update the styles defined in the theme and automatically update the associated text throughout the site without format overrides that would prevent it.

To add a text component:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. Click in the paragraph component to enter the text. The text takes on the formatting of the default style for the component (<p> or paragraph element).

   To add an additional paragraph, just press Enter.

   > ✎ **Note:**
   >
   > You can copy and paste content from other sources into the text component, but images and underlying HTML tags are removed.

4. To change the base style for the text component:

   a. Click the component's menu icon and choose **Settings**.

   b. Click **Choose Style** and choose the style from the menu.

      The list includes standard HTML tags for paragraph and headings. The style you select assigns the associated tag to the content.

   The component reflects the selected base style.

Buttons

Use a button to make a link or other functionality more apparent on the page.
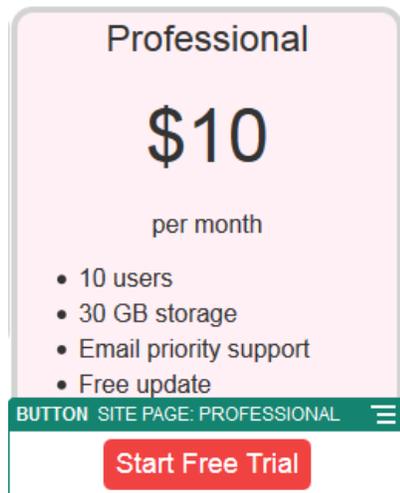
To add a button to the page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page.

3. To adjust the properties for the button, click its menu icon ☰ and choose **Settings**.

   You can specify the text on the button (label), size, alignment and other display options for the button.

   > **Note:**
   >
   > If you set the **Width** and **Height** fields to 0 (zero), the button will automatically size to the fit the text you specify for the label.

   To specify the background color, font, border, and other settings, click the **Style** tab. You can choose from the predefined styles in the current theme or click **Customize** to specify your own values.

4. To associate a link or other actions with a button:

   a. In the Settings panel, click **Link**.

   b. Click **Select Link Type** and choose one of the following options:

      • **No Link**: The button performs no action when the user clicks it.

      • **Web Page**: Specify a full URL to an external page or site.

      • **Site Page**: Select a page on the current site.

      • **File Download**: Download a selected file from the repository. Select a file.

        If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

- **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

- **Lightbox Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

- **Trigger Actions**: Select one or more page actions to perform when the button is pushed. Page actions include:

  – **Navigate to Site Page**: Select a page on the current site.

  – **Navigate to External URL**: Specify a full URL to an external page or site.

  – **Show Alert**: Show a specified message in a window.

  – **Show or Hide a Component**: Select a component on the current page to show, hide, or toggle.

  – **Show or Hide a Slot**: Select a slot on the current page to show, hide, or toggle.

  See Use Triggers and Actions.

Structure Components

Structure components help to separate content on the page.

- Dividers
- Spacers

Dividers

Use a divider (horizontal line) to create a visual break in a column or across a page.

To add a divider to the page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page.

3. To adjust the properties for the divider, click its menu icon ☰ and choose **Settings**.

   You can specify the horizontal placement and length of the divider by adjusting the left and right spacing options.
   Line color, thickness, and other settings are defined by the component style. You can choose from the predefined styles in the current theme or click **Customize** to specify your own values.

Spacers

Managing the "white space" on pages can make the page more visually appealing and more readable. Use the spacer component to add white space without having to override the spacing defined in styles or in other components.

To add vertical blank space between components in the page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page.
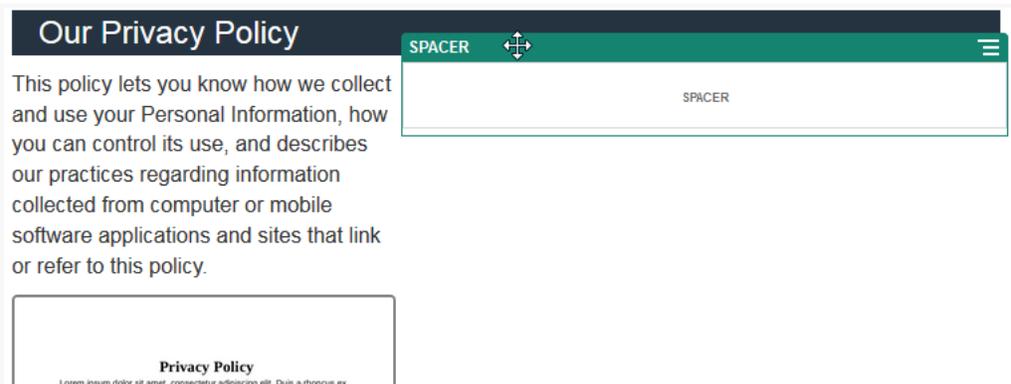
3. To adjust the height of the spacer, click its menu icon ☰ and choose **Settings**.

Media Components

Media components bring image and video to your pages.

*   Images
*   Galleries
*   Gallery Grid
*   YouTube Videos
*   Videos

Images

Images can direct a viewer's attention and invite the viewer to explore different content areas on the page.

To add an image to a page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page. The image component shows a placeholder image until you select the image you want to use.

3. To select an image, click the menu icon , choose **Settings**, and click **Select** next to the Image field.

4. Select an image from the site repository, an image from a documents folder that's been shared with you, or upload an image to a documents folder.

> **✎ Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

   a. Locate and select the image you want to use.

   If you don't see any digital assets, click , and change the collection filter to **All**.

   b. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.

   c. Click **OK**.

   d. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

5. Use the Settings panel to add a caption or to modify spacing, alignment, style, and other options.

6. You can associate a link or other actions with an image:

   a. In the Settings panel, click **Link**.

   b. Select one of the following options:

      • **No Link**: The image performs no action when the user clicks it.

      • **Web Page**: Specify a full URL to an external page or site.

      • **Site Page**: Select a page on the current site.

      • **File Download**: Download a selected file from the repository. Select a file.

If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

- **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

- **Lightbox**: Open the image over a dimmed and inactive version of the page.

Galleries

Use an image gallery to present a series of images. You can choose to let the images automatically cycle or let the user advance through the images manually.

To add an image gallery to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The gallery component shows a placeholder image until you select the images you want to use.

3. To add one or more images to the gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.

4. Click **Add Images**.

5. Select one or more images.

> **Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

a. Locate and select the images you want to use.

   If you don't see any digital assets, click ▥, and change the collection filter to **All**.

b. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.

c. Click **OK**.

d. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

The selected images are added to the list of images. Drag and drop the images to reorder them in the list. The default title of each image is the file name without the extension.

6. To change the title, description, or other options for a particular image, click the image in the list and make the change.

   You can also associate a link or other actions with an image in the gallery:

   a. In the Settings panel for a particular image, click the Link field.

   b. Select one of the following options:

      • **No Link**: The image performs no action when the user clicks it.

      • **Web Page**: Specify a full URL to an external page or site.

      • **Site Page**: Select a page on the current site.

      • **File Download**: Download a selected file from the repository. Select a file.

         If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.
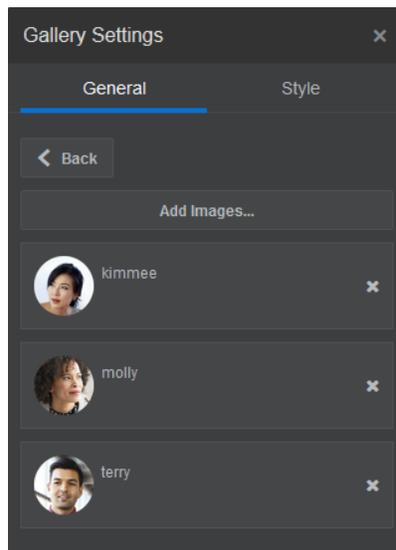
      • **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

   c. Click **Back** to return to the image settings panel. Click **Back** again to return to the image list to select another image to update.

   d. When you're done updating individual images, click **Back** to specify gallery options.

7. To size and scale images in the gallery:

   a. Use **Width** to specify the width, in pixels, of the gallery within the slot. Click an alignment option other than **Fill** to specify the width. After you set the width, you can use **Fill** to extend the image to the specified width.

   b. Select a **Scaling** option to adjust the presentation of images in the gallery:

- **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.

- **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.

- **Stretch**: The larger of the two dimensions (width or height) is scaled to fit the available space and the smaller dimension is stretched to fill the available space.

- **None**: The image is used at its full pixel resolution and is cropped uniformly if it doesn't fit in the available space.

8. To help the user move through the gallery:

   a. Select a **Navigation** method:

      - **Thumbnails**: Show a list of the images in the gallery in sequence below the gallery. The user clicks a thumbnail image to go to the associated image in the gallery.

      - **Indexer**: Show a series of buttons below the gallery to represent each image in the gallery. The user clicks a button to go to the associated image in the gallery.

      - **None**: Provide no visual navigation. The user can swipe right or left to display the adjacent image. This manual method is always available.

   b. Click **Show Previous/Next** to include arrow icons on each image to advance to the previous or next image in the gallery.

9. You can elect to show or hide a caption for the image by selecting the **Show Caption** box.

10. To have the gallery cycle through the images automatically, select **Autoplay** and specify **Transition Time** and **Display Time**.

    The user can still use all the manual navigation features you set up.

Gallery Grid

Use a gallery grid to present a set of images at one time in rows and columns.

To add an image gallery to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The gallery grid component shows a placeholder image until you select the images you want to use.

3. To add one or more images to the gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.

4. Click **Add Images**.

5. Select one or more images.

> **Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

a. Locate and select the images you want to use.

If you don't see any digital assets, click ![icon], and change the collection filter to **All**.

b. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.

c. Click **OK**.

d. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

The selected images are added to the list of images. Drag and drop the images to reorder them in the list (and in the grid). The default title of each image is the file name without the extension.

6. To change the title, description, or other options for a particular image, click the image in the list and make the change.

You can also associate a link or other actions with an image in the gallery:

a. In the Settings panel for a particular image, click the Link field.

b. Select one of the following options:

- **No Link**: The image performs no action when the user clicks it.

- **Web Page**: Specify a full URL to an external page or site.

- **Site Page**: Select a page on the current site.

- **File Download**: Download a selected file from the repository. Select a file.

  If you select a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

- **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.

- **Lightbox**: Open the image over a dimmed and inactive version of the page.

c. Click **Back** to return to the image settings panel. Click **Back** again to return to the image list to select another image to update.

d. When you're done updating individual images, click **Back** to specify gallery options.

7. Use the **Layout** option to arrange the images in a grid.

   • Masonry

   • Columns

   • Custom

   Each of these options is described in the steps that follow.

8. Choose the **Masonry** layout to automatically arrange the images in rows within the available space.

   The resulting rows have a uniform height, but no defined columns.
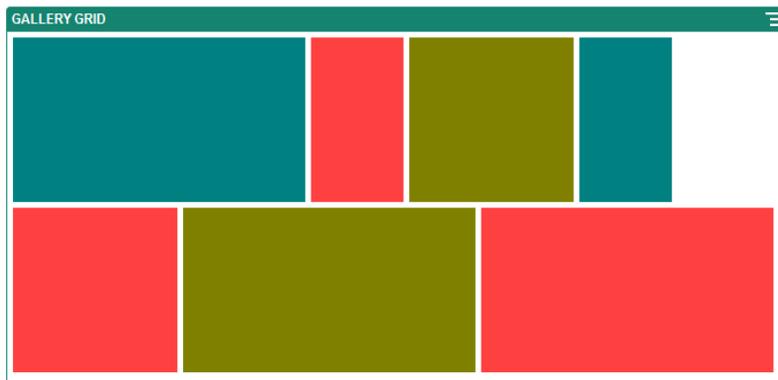
   a. Specify **Height** to proportionately scale all images to the specified height in pixels.

   b. Specify **Image Spacing** to increase or decrease the space between images in the row.

9. Choose the **Column** layout to arrange the images in rows and columns.

   a. Select a **Scaling** option to adjust the presentation of images in the grid:

      • **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.

      • **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.

      For example, the following grid uses four columns and scales the six images to fit:

Here's the same grid with the images cropped:

    b. Specify an **Aspect Ratio** to determine the shape of the cells in the grid.

       • **Square**: An aspect ratio of 1:1.

       • **Landscape**: An aspect ratio of 16:9.

       • **Portrait**: An aspect ratio of 9:16.

       • **Custom**: Specify your own numeric values for the aspect ratio.

    c. Specify the number of **Columns**.

    The grid adjusts automatically to create columns of equal width.

    d. Specify **Image Spacing** to increase or decrease the space between images in both rows and columns.

10. Choose the **Custom** layout to arrange the images in rows and columns based on an image size and width that you specify.

    a. Select a **Scaling** option to adjust the presentation of images in the grid:

       • **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.

       • **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.

    b. Specify an **Image Height** and **Image Width** to determine the shape of the cells in the grid.

    The grid adjusts automatically to create cells with the dimensions you specify.

c. Specify **Image Spacing** to increase or decrease the space between images in both rows and columns.

11. Specify **Alignment**, **Width**, and **Spacing** options to position the grid within the slot.

Use **Width** to specify the width, in pixels, of the gallery within the slot. Click an alignment option other than **Fill** to specify the width. After you set the width, you can use **Fill** to extend the image to the specified width.

YouTube Videos

Include streaming YouTube videos to add motion and visual engagement to the page.

To use videos other than those hosted by YouTube, see Videos.

To add a YouTube video to the page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page. The component shows a placeholder image until you select the video you want to use.

3. To specify the YouTube video to use and to adjust its display properties, click its menu icon ☰ and choose **Settings**.

4. Locate the video you want to use, then copy the URL and paste it into the **YouTube URL** field.

5. Specify any display options:

   • **Show Controls**: Enable on-screen and device options to allow the user to manually control video playback.

   • **Show info**: Temporarily include the video description in the upper left corner of the video.

   • **Autoplay**: Automatically start video playback.

   • **Loop**: Automatically repeat the video after it completes.

6. Use the **Aspect Ratio** defined for the video (**Auto**) or choose another aspect ration to determine the shape of the video display.

7. Specify any alignment or spacing options to position the video.

Videos

Include videos streamed from Oracle Content and Experience Cloud to add motion and visual engagement to the page.

To use videos hosted by YouTube, see YouTube Videos.
To stream a video stored in Oracle Content and Experience Cloud:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page. The component shows a placeholder image until you select the video you want to use.

3. To specify the video to use and to adjust its display properties, click its menu icon ☰ and choose **Settings**.

4. Choose the video you want to use.

   a. Click **Select**.

   b. Locate and choose the video from the files in Oracle Content and Experience Cloud.

   > ✎ **Note:**
   >
   > Chose a video file of type MP4. The MP4 video format is common to all supported browsers.

   c. To link to the video in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the video is stored with the site and referenced from the site.

   Video files can be large. Linking to the original video avoids duplicating the content. In addition, the link allows site visitors to see the video even if the permissions on the video file change or would otherwise restrict viewing.

5. Select a preview image for the graphic. Some videos have a predefined preview image. Those that don't show a blank screen as the preview image. If you want to use a graphic in place of a blank screen, click **Select** and choose an image from your Digital Assets repository.

6. Specify any display options:

   • **Show Controls**: Enable on-screen and device options to allow the user to manually control video playback.

   • **Show Description**: Temporarily include the video description in the upper left corner of the video.

   • **Autoplay**: Automatically start video playback.

   • **Loop**: Automatically repeat the video after it completes.

7. Use the **Aspect Ratio** defined for the video (**Auto**) or choose another aspect ration to determine the shape of the video display.

8. Specify any alignment or spacing options to position the video.

Document Components

Let's look at some components that let you access and display files and folders.

• Documents

• Folder Lists

• File Lists

• Documents Manager

• Project Library

Documents

You can view multi-page documents and slide presentations directly from a page.

To add a document to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The document component shows a placeholder image until you specify the document to show.

3. To select a document, click its menu icon , choose **Settings**, and click **Select** next to the Document field.

   The document must be stored in the site repository or another repository to which you have access. You can also use documents that were shared with you or that you uploaded from a local or network file location.

4. Select a document and click **OK**.

   > **Note:**
   >
   > The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing a document file, you must select a file with a valid document format such as TXT or DOC.

5. Use the Settings panel to add a caption or to modify spacing, alignment, style, and other presentation options.

6. To help the user move through the document:

   a. Click **Show Page Numbers** to show a page number below each page.

    b. Select a **Navigation** method:

-     **Thumbnails**: Show a list of the pages in the document in sequence below the document. The user clicks a thumbnail image to go to the associated page.

-     **Indexer**: Show a series of buttons below the document to represent each page in the document. The user clicks a button to go to the associated page.

-     **None**: Provide no visual navigation. The user can swipe right or left to display the adjacent page. This manual method is always available.

    c. Click **Show Previous/Next** to include arrow icons on each page to advance to the previous or next page in the document.

Folder Lists

You can use a folder list to list the folders within a specified folder from your Oracle Content and Experience Cloud account.

If you use this component in conjunction with one or more file list or document manager components on the page, these components can automatically display the contents of a folder selected in the folder list.

To add a folder list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Custom Settings** to set the default details about the content that's displayed.

5. Click **Select** next to **Folder Selection** to change the folder to use for display. You must select a folder other than document repository home page. Click **Back** when you are done.

> **Note:**
>
> The folder list grants all users downloader access. Users can view and download files regardless of their role. If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

6. Choose from the following to set additional defaults for the content that's displayed.

- **Choose Default Selection**: If you selected **Oracle Documents Folder**, select the folder (if any) to show as selected in the list.

- **Show folder name header**: Select this to display the folder name in the heading of the embedded component.

- **Folder Sorting**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.

- **Show Subfolders**: Use the slide bar to limit the number of subfolders displayed.

7. Use the General tab to modify spacing, alignment, and other presentation options.

8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

File Lists

You can use a file list to provide a view of files from a specified folder in your Oracle Content and Experience Cloud account.

If you use this component in conjunction with one or more folder list components on the page, the file list component can automatically display the contents of a folder selected in the folder list. You can also configure the component to perform one or more actions when a user clicks a file in the list. For example, you can preview the selected file in a separate browser window, or in a "lightbox" overlay, or even in a Documents Manager component on the page.

To add a file list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add a component group to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Custom Settings** to set the default details about the content that's displayed.

5. Click **Select** next to **Folder Selection** to change the folder to use for display. You must select a folder other than the document home page. Click **Back** when you are done.

> **✎ Note:**
>
> The file list grants all users downloader access. Users can view and download files regardless of their role. If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

6. Choose from the following to set additional defaults for the content that's displayed.

- **Display options**: Choose what details will be shown with the listed files.

  – **Folder name header**: show the folder name in the heading.

  – **File description**: show the file description, if one is given.

  – **File separators**: separate each file by a line.

  – **Download icon**: include a download icon so users can download the file if they want.

– **Last updated**: show the date when the file was last updated.

– **File size**: show the size of the file.

– **Image**: show a thumbnail image of the contents of the file.

- **Triggers & Actions**: Choose if you'd like to auto-refresh the file list with contents of the folder selected in a Folder List component. You can also choose to enable the File Selected trigger when a file is selected. Use the Link tab to associate actions with the **File Selected** trigger.

- **File Sorting**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.

- **Show Files**: Choose if all files will be displayed or if you want to limit the number of files using the slider bar.

7. Use the General tab to modify spacing, alignment, and other presentation options.

8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

9. Use the Link tab to associate actions with the **File Selected** trigger. For example, to configure the file list component to preview a selected file in a lightbox overlay:

    a. Make sure you select **Activate trigger when file is selected** in the File List Settings window.

    b. In the Link tab of the file list settings, click the **File Selected** trigger.

    c. Click and drag the **Lightbox Preview** page action to the action list.

    d. In the File ID or URL field, choose **File Link**.

    File Link uses a reference link with downloader privileges so all site visitors can preview and optionally download the file. If you use **File ID**, a member link is used. A member link allows only registered users to preview and optionally download the selected file.

    When the user clicks on a file in the file list, the file preview opens over a dimmed and inactive version of the page.

Documents Manager

You can use documents manager to provide a view of your home page or files in Oracle Content and Experience Cloud.

To add a documents manager component to a page:

1. Navigate to the page you want to edit and make sure that [icon] is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon [icon], and choose **Settings**.

4. Choose **Custom Settings** to set the default details about the content that's displayed.

5. Click **Select** next to **Folder Selection** to change the folder to use for display.

    To select a folder, check the box next to the folder name. To open a folder, click the folder name. Click a folder name in the path to return to that folder or click **Navigate to Home** to return to the home folder. Click **Back** when you are done.

6. Click **Select Folder Access** and choose the access role to grant visitors.

Visitors will be able to view and work with the folder content based on their role and on the **Browsing Options** you enable in the next step.

- **Member Access**: Visitors will be able to use any features available to members of the folder, such as viewing conversations, annotations, or custom properties of items.

- **Viewer**: Viewers can look at files and folders, but can't change things.

- **Downloader**: Downloaders can also download files and save them to their own computer.

- **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

Consider the following when setting folder access:

- A site author can't grant access to a folder that is greater than the access they themselves have. For example, if the author has downloader access to a folder, they can't give contributor rights to site visitors.

- The privileges set on the folder in the component can augment the visitor's privileges. For example if the visitor has viewer privileges (or no privileges) for the folder, the component can grant greater privileges based on the selected role. These enhanced privileges are valid only in the component itself.

- If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

- Privileges granted on a folder apply to the folders and files nested in that folder.

7. Choose from the following to set additional defaults for the content that's displayed.

- **Layout**: Select an initial grid , list or compact list layout for the folders and files. Users can change the layout when they view the finished embedded component.

- **Color Scheme**: Choose one of the available color schemes for the embedded folder listing.

- **Sort Order**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.

- **Browsing Options**: Choose what options will be available to users when they select an item. For example, you can choose to allow users to view files, download files, share or copy files and folders, or delete files. If you want to restrict what users can do with your files and folders, deselect an option in this list. If you chose Member Access in the previous step, you can elect to show a side pane where any conversations, annotations, or custom properties will be shown.

- **Viewer Options**: Choose how users will view files. You can allow files to be viewed within the embedded frame or in another tab (or window depending on your browser settings). You can also hide or show thumbnails, and customize how videos are viewed.

- **Show Zoom Controls**: Choose whether to show a slider bar or zoom controls in the embedded view of the folder.

- **Viewer Fit Mode**: You can choose to have files be shown filling the page, filling the width of the page, or in the original size.

- **Triggers & Actions**: Choose to refresh a file list if it is also used with the folder list component.

8. Use the General tab to modify spacing, alignment, and other presentation options.

9. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

After the documents manager has been added, viewers will see a view of the selected folder embedded in a frame on your site. Users can use the provided display options to change how folders and files are listed. If a user selects a file or folder, they can choose options provided by the menu bar or with the right-click menu and perform any action allowed by their role and the **Browsing Options** you specify.

If a conversation is associated with an item, you'll see [icon] with the item. Click it to open the conversation pane where you can view annotations and comments. Independent conversations (those not associated with a folder) must be added using the conversation component.

If an item has custom properties, you can view the properties in a pane. Click **More** then select **Custom Properties** to open the property pane.

Project Library

You can use a project library to assemble folders from different locations in the repository without having to change the original folder or its location. You can also use the project library component to assign different permission levels to each folder to accommodate different project team roles.

For example, if you give a folder in the project library one of the visitor roles (viewer, downloader, or contributor), visitors can see and interact with the folder content with the privileges associated with the role. If you specify member access, only members will see it listed in the project library. Members interact with the folder content with the privileges specified for them on the original folder.
If you use this component in conjunction with one or more file list or document manager components on the page, these components can automatically display the contents of a folder selected in the project library.

To add a project library component to a page:

1. Navigate to the page you want to edit and make sure that [icon] is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon [icon], and choose **Settings**.

4. Choose **Custom Settings** to select conversations and to select display options.

5. Specify a title. The default title is Project Library. You can choose to display or hide the title by selecting or deselecting the **Title** display option below.

6. Select a **Color Scheme**.

> **✏ Note:**
>
> If you use triggers and actions to associate a project library with a documents manager component, the color scheme you select for the project library also applies to the folder selected to show in the documents manager component. This is not the case if you associate the project library with folder list or file list components because those components do no support color schemes.

7. Click **Add** next to the list of folders to add an existing folder or to create a new folder.

    a. Navigate to and Select one or more folder or click **Create** to create a folder. Each folder you select in this window is added to the project library.

       You can use any of the options listed in the tool bar including view and sort options.

    b. Click **Back** when you are done.

8. To organize the list, select a folder and click **Move Up** or **Move Down** to change its location in the list order or click **Remove** to remove the folder from the list.

9. To specify access to a folder based on the user's role, select the folder from the list of folders, click **Select Folder Permission**, and choose the access role.

    - **Member Access**: Only registered users with permissions on the folder will see the folder listed in the project library. Members interact with the folder content with the privileges specified for them on the original folder.

    - **Viewer**: Viewers can look at files and folders, but can't change things.

    - **Downloader**: Downloaders can also download files and save them to their own computer.

    - **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

    Consider the following when setting folder access:

    - A site author can't grant access to a folder that is greater than the access they themselves have. For example, if the author has downloader access to a folder, they can't give contributor rights to site visitors.

    - The privileges set on the folder in the component can augment the visitor's privileges. For example if the visitor has viewer privileges (or no privileges) for the folder, the component can grant greater privileges based on the selected role. These enhanced privileges are valid only in the component itself.

    - If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

    - Privileges granted on a folder apply to the folders and files nested in that folder.

10. For folders with **Member Access** permission, you can display conversations associated with folders or content by clicking **Show Conversation pane in Documents Manager**.

    If you select this option and configure a documents manager component on the page to display a selected folder, the user can click the conversation icon to

display any conversations associated with the folder. If you do not select this option, the conversation icon is not shown.

11. When you are done, close the window.

12. Use the General tab to modify spacing, alignment, and other presentation options.

13. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

14. Use the Link tab to associate actions with the **Folder Selected** trigger. For example, if you also add a documents manager component to the page, you can use the documents manager component to display the contents of a folder selected in the project folder:

   a. In the Link tab of the project library settings, click the **Folder Selected** trigger.

   b. In the Configure Trigger Actions window, click Documents Manager.

   c. Click and drag the **Display documents** action to the action list.

   d. In the Folder ID or URL field, choose **Selected Folder**.

   When the user clicks on a folder in the project library, the folder content is displayed in the documents manager component on the page.

Social Components

Social components help your users stay connected and communicate.

- Social Bar
- Facebook Like and Recommend
- Twitter Share and Follow
- Conversation Component
- Conversation List

Social Bar

Easily add icons and links to popular social media, such as Facebook and Twitter. The social bar includes some targets by default, but you can add and remove items in the social bar.

To add and modify a social bar:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The social bar shows the icons included by default.

3. To add or change the icons in the social bar, click its menu icon , choose **Settings**, and click **Icons** at the top of the **General** tab.

To remove a social icon, click the x next to the name. To add an icon, the icon must be stored in the site repository or another repository to which you have access. You can also use images that were shared with you or that you uploaded from a local or network file location.

4. To upload one or more icons from a local or network location:

    a. Click **Add Icons** at the top of the panel.

    b. Navigate to the location in the repository where you want to store the image or click to add a new folder in the current location.

    c. Click .

    d. Locate and select the image file or files and then click **Open**.

    The image files are uploaded to the current location in the repository.

5. Select one or more images in the repository and click **OK**.

    a. Locate and click the image or images you want to use.

    b. To link to the file in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.

    c. Click **OK**.

    The selected images are added to the list of images. Drag and drop the images to reorder them in the list. The default title of each image is the file name without the extension.

6. To change the target URL, title, description or other options for a particular image, click the image in the list and make the change.

    When you're done updating individual icons, click **Back** to specify general options.

7. Specify the size, spacing, orientation, and alignment for all of the icons in the social bar.

Facebook Like and Recommend

You can add a Facebook Like button to a page to let viewers easily like your site on Facebook.

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the app and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Facebook Like Settings** or **Facebook Recommend Settings** to set the URL and to optionally add a **Share** button so you can easily post a link to your site on a Facebook page.

5. Use the General tab to modify spacing, alignment, and other presentation options.

6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

Twitter Share and Follow

You can add a Twitter Share button to a page to let viewers quickly share a link on a Twitter account.

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the app and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Twitter Follow Settings** to set the Twitter user name and to choose whether to show the user name and to choose the size of the **Follow** button. Choose **Twitter Share Settings** to set the following defaults. Users can change the values when they use the button.

   • **Share URL**: The URL of the site a user can share.

   • **Tweet Text**: The text of a tweet about the page.

   • **Via @**: The Twitter user account used for the tweet.

   • **Recommend @**: The Twitter user account used for a Twitter recommendation.

   • **Hashtag #**: A hash tag you'd like used for the post.

   • **Count**: A display of the Share count, either vertical or horizontal.

   • **Large button**: Choose either a large or smaller button for the app.

5. Use the General tab to modify spacing, alignment, and other presentation options.

6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

Conversation Component

You can use a conversation to promote discussion about a topic directly from your site.

> ✏️ **Note:**
>
> For a conversation to work on a site, the site must be a secure site limited to specified users or limited to users with the Content and Experience Cloud Users role. See Change Site Security.

To add a conversation component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Custom Settings** to select a conversation and to select a presentation color scheme.

5. Click **Select** next to **Choose Conversation** to select an existing conversation or to create a new one.

   a. Select a conversation from the list of available conversations or click **Create** to create and name a new conversation.

   The list contains all the conversations to which you have access.
   You can filter the list:

   - **All**: Shows all conversations except those that are marked as muted.

   - **Favorites**: Shows conversations that have been marked as favorites.

   - **Muted**: Shows conversations that have been muted and excluded from your list of conversations.

   - **Closed**: Shows all conversations that are marked as closed.

   You can also sort the list:

   - **Last Updated**: List conversations in order from most recently updated to least recently updated.

   - **Name**: Lists conversations in alphanumeric order from lowest to highest.

   - **Unread**: Lists unread conversations first in order of the conversation with the most unread comments to the conversation with the least number of unread comments.

   b. Click **Back** when you are done.

   c. If you selected an independent conversation (one not based on a file or folder), you can set the access permission for people viewing the conversation.

   d. Select a **Color Scheme**.

   e. To use the conversation component in conjunction with a conversation list component on the page, select **Auto-refresh conversation based on selection in the conversation list component**.

   When a user selects a conversation from the list, it displays in the conversation component.

   f. When you are done, close the window

6. Use the General tab to modify spacing, alignment, and other presentation options.

7. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

On the published site, visitors will see the conversation in a frame on your site. Users can navigate within the conversation to read and respond to comments.

> **✎ Note:**
>
> If the visitor has not been explicitly added as a member of the conversation, they will have the ability to read and reply to comments, but they will not see items 1 through 4 in the image below.
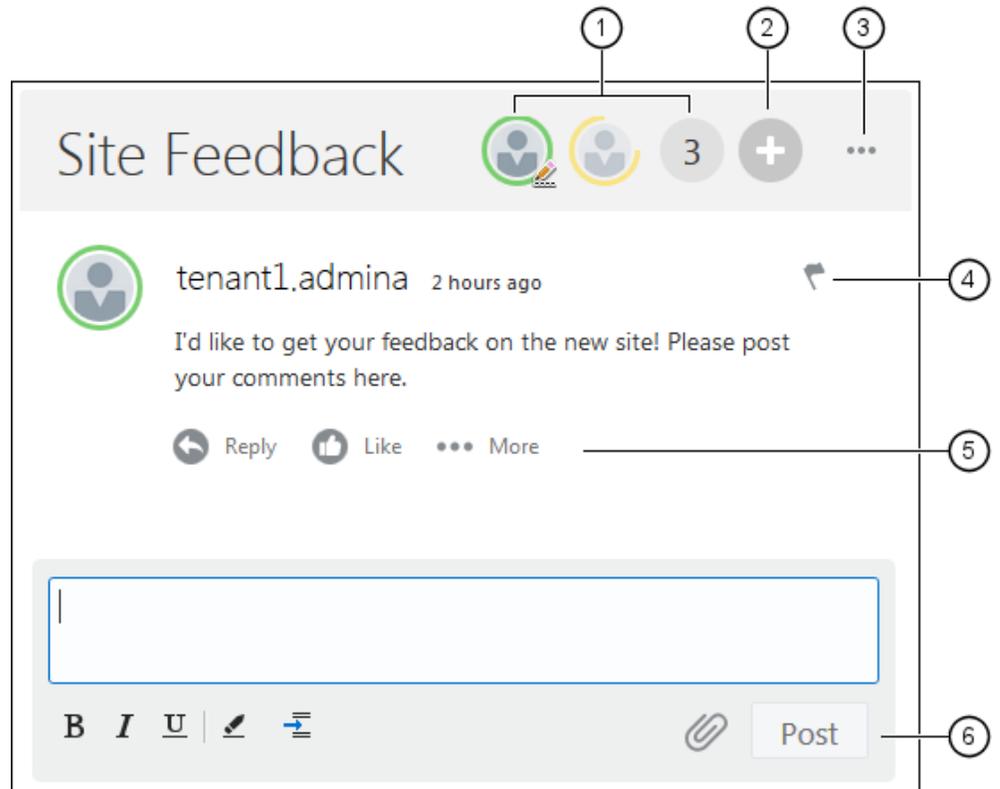
- The **menu bar (1)** has information about individual participants in the conversation. Click a user icon to get status information and to see options for working with the user. The number icon shows the total number of participants. Click the icon to see the complete list.

- Click **Add Users (2)** to add users to the conversation.

- Click **More Options (3)** to see a list of options for working with the conversation. The list of options varies with the role of the user. For conversations associated with folders and files, The list of options also depends on the permissions set on the folder or file.

- Click **Flags (4)** to alert a particular user by assigning them a notification flag. The user is alerted by email as specified in their preferences.

- Use the **comment options (5)** to perform actions on a particular comment in the conversation such as replying to the comment, or liking, editing, or deleting the comment.

- When you add or edit a comment, use the **edit options (6)** to add or remove basic formatting such as bold or underlining, add an attachment, and post the comment to the conversation. Unless the site visitor is a member of the conversation, they won't be able to add attachments.

Conversation List

You can use a conversation to promote discussion about a topic directly from your site.

If you use this component in conjunction with one or more conversation list components on the page, the conversation list component can automatically display the contents of a conversation selected in the conversation list.

> **✎ Note:**
>
> For a conversation or conversation list to work on a site, the site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Users role. See Change Site Security.

To add a conversation list component to a page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon ▤, and choose **Settings**.

4. Choose **Custom Settings** to select conversations and to select display options.

5. Specify a title. The default title is Conversation List. You can choose to display or hide the title by selecting or deselecting the **Title** display option below.

6. Click **Add** next to the list of conversations to add an existing conversation or to create a new one.

    a. Select one or more conversations from the list of available conversations or click **Create** to create and name a new conversation.

    b. Click **Back** when you are done.

    c. Choose the permissions allowed for those who view the conversation list.

7. To organize the conversation list, select a conversation and click **Move Up** or **Move Down** to change its location in the list order or click **Remove** to remove the conversation from the list.

8. Select a **Color Scheme** and chose additional **Display Options**. The display options you select are shown below the name of the conversation in the list.

9. When you are done, close the window.

10. Use the General tab to modify spacing, alignment, and other presentation options.

11. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

The following image shows a conversation list titled *Session Feedback* with all display options selected.

Process Components

Process components let site users initiate and manage tasks for predefined processes.

> **Note:**
>
> To use process components, you must use Oracle Process Cloud Service release 17.1.3 or later.

- Process Start Form
- Process Task List
- Task Detail Form

Process Start Form

You can use a process start form to initiate a process defined with Oracle Process Cloud Service.

For a process start form to work on a site, the following must be true:

- The associated processes and process start forms must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Structured Processes in *Using Processes in Oracle Integration*.

- To use the process start form, the user must be assigned the role associated with the process swimlane that contains the start form.

- The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See Change Site Security.

- An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrate with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a process start form component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon ☰, and choose **Settings**.

4. Select a partition for the start form. You can choose between a Test partition (for testing) or a Production partition (for finished work)

5. Choose **Custom Settings** to select a process start form and to set form defaults. You can set name and value pairs to prepopulate the start form. The name is one of the form fields, not a label used on the form, and the value is what is allowable for that field. You can use the special values of `%%username%%` and `%%userid%%` to insert the current logged-in user data in a value.

6. Select the partition for the start form. You can use the Test partition to verify that the process is working as planned or the Production partition to deploy the process for general use.

7. Click **Select a start form** to choose a predefined start form. Forms have the following syntax: `process type:version:processname:start`. For example, `Basic Approval:1.0:Process:Start Basic Approval`.

   If a message at the top of the window states "No Process Cloud Service connection", it's possible that the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud is not configured. Contact your administrator.

   The process author must add you as an initiator of the process to see it in the list. The process author must add all site visitors as initiators of the process or the visitors will be able to complete the form, but not initiate the process.

8. Choose from the following to set additional defaults for the form.

   • **Form title**: Optionally replace the default form title with a title of your own.

   • **Submit button name**: Optionally rename the **Submit** button with a value you specify.

   • **Show Submit button**: Optionally show or hide the **Submit** button on the component (it's shown by default). You might hide the component **Submit** button if a similar button is provided on the form itself.

   • **Submit confirmation**: Optionally replace the default confirmation message with a message of your own.

   • **Show submit confirmation**: Optionally show or hide the confirmation message when the **Submit** button is clicked. It's shown by default and displays within the process start form component.

   • **Show Save button**: Optionally show or hide the **Save** button on the component (it's hidden by default). You might show the component **Save** button if the associated process allows you to save your work and return to it later.

   • **Show Discard button**: Optionally show or hide the **Discard** button on the component (it's hidden by default). You might show the **Discard** button if you want to allow the user to discard the form content and start over.

   • **Show Attachments**: Optionally show or hide an **Attachments** area on the form with ability to upload a file or files (it's hidden by default). Files uploaded are stored as part of the process in Oracle Process Cloud Service.

9. Use the General tab to modify spacing, alignment, and other presentation options.

10. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

11. Use the Links tab to assign actions to the triggers provided by the component:

    • **Start form submitted**: This trigger occurs when the user clicks the **Submit** button.

    • **Start form saved**: This trigger occurs when the user clicks the **Save** button.

    • **Start form discarded**: This trigger occurs when the user clicks the **Discard** button.

    Click the trigger to assign an action.

> **Note:**
>
> You can add a conversation component to the page and assign any of the triggers to display process information in the conversation component. To use the conversation component for messaging in this way, do not select a conversation to display. The process associated with the start form assigns the conversation as part of the trigger. Just select the trigger and assign the conversation's Display Conversation action with Conversation Id as the payload. For more information about assigning triggers and actions, see Use Triggers and Actions.

Process Task List

You can use a process task list to selectively list processes defined with Oracle Process Cloud Service. You can show detailed information for the tasks in the task list component, or use the process task list component in conjunction with a task detail component to simplify the list and to show detailed information for a selected task only.

For a process task list to work on a site, the following must be true:

• The associated processes must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Structured Processes in *Using Processes in Oracle Integration*.

• The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See Change Site Security.

• An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrate with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a process task list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Choose **Custom Settings** to set display options and to filter the available tasks.

5. Choose from the following to set display options for the task list.

> **Note:**
>
> You can set display options for the component, but the presentation of the tasks themselves is determined by the design in Oracle Process Cloud Service.

- **Show Details**: Select to include task detail information in the task list itself. Use the process task list component in conjunction with a task detail component to simplify the list and show detailed information for a selected task only.

- **Show Search**: Select to include the search bar at the top of the task list. If you select **Show Search**, you have the additional option of selecting **Show Filter** to include the filter option in the search bar. Use the filter options below to set the default filter values.

- **Show Select All**: Select to allow the user to select all the displayed task for processing.

- **Page Size**: Adjust to specify the maximum number of tasks to display. If there are fewer tasks than the specified maximum, the component automatically adjusts to the smaller number. If there are more tasks than the specified maximum, the component shows the maximum number and adds links to the additional page or pages.

6. Choose from the following to filter the available tasks in the list.

The filters you apply determine the initial list of tasks. If you choose the **Show Search** and **Show Filter** options above, the user can adjust the settings to modify the filter for all settings except **From User**.

- **Search Keywords**: Optionally specify one or more search terms. Search results include only those tasks with titles that include all of the specified keywords. If you selected **Show Search**, these keywords are displayed in the search bar and can be removed or modified by the user.

- **Status**: Select one of the available Status values. The default is **Assigned**.

- **Assignee**: Select one of the available Assignee values. The default is **Me and My Group All** which includes all tasks available to the user and their group, including those that are claimed but not workable.

- **From User**: Optionally select one or more users from whom the task originates. Begin typing the user name to initiate a search of the available users on the associated Oracle Process Cloud Service. The values you specify are not displayed to the end-user and can't be removed. Users can add additional user names to further expand the list of users.

- **Due Date**: Optionally select a due date that is On, Before, After, or Between a date selected from the calendar.

- **Application**: Optionally select the name of a particular application. You can select one or more applications from the list of applications available to the user.

7. Use the General tab to modify spacing, alignment, and other presentation options.

8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

> **Note:**
>
> If you have a process task list and a task detail form on the page, the task detail component automatically displays the detail for a task selected from the list. For more information about triggers and actions, see Use Triggers and Actions.

Task Detail Form

You can use a task detail form in conjunction with a process task list to display details for a selected task. If you have a process task list and a process detail form on the page, the process task detail component automatically displays the detail for a task selected from the list.

For a task detail form to work on a site, the following must be true:

- The associated processes must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Structured Processes in *Using Processes in Oracle Integration*.

- The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See Change Site Security.

- An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrate with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a task detail component to a page:

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon ☰, and choose **Settings**.

4. Choose **Custom Settings** to set display options.

5. Choose from the following to set display options for the task detail form.

> **Note:**
>
> You can set display options for the component, but the presentation of the task detail is determined by the design in Oracle Process Cloud Service.

- **Show Actions**: Select to display the actions available to the user, such as Approve, Reject, and so on.

- • **Show Save**: Select to display the **Save** button.
- • **Show Close**: Select to display the **Close** button.
- • **Show Attachment**: Select to display the **Attachment** section in the detail form.
- • **Show Comments**: Select to display the **Comments** section in the detail form.
- • **Show History**: Select to display the **History** section in the detail form.
- • **Show More Information**: Select to display the **More Information** section in the detail form.
- • **Show Links**: Select to display the **Links** section in the detail form.

6. Use the General tab to modify spacing, alignment, and other presentation options.

    By default, the task detail component expands to display all the specified detail. Click **Set Height** and adjust the height value to set a specific height.

7. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

8. Use the Links tab to assign actions to the triggers provided by the component:

    - • **Task details submitted**: This trigger occurs when the user clicks the **Submit** button.
    - • **Task approved**: This trigger occurs when the user clicks the **Approve** button.
    - • **Task rejected**: This trigger occurs when the user clicks the **Reject** button.
    - • **Task closed**: This trigger occurs when the user clicks the **Close** button.
    - • **Task saved**: This trigger occurs when the user clicks the **Save** button.
    - • **Task comment added**: This trigger occurs when the user adds comment text and clicks the **Post Comment** button.

    Click the trigger to assign an action.

> **Note:**
>
> The process task list component does not support manual triggers or actions, however if you add a task detail component to the page, it automatically displays the detail for a task selected from the list. For more information about triggers and actions, see Use Triggers and Actions.

For information about using Oracle Process Cloud Service, see Getting Started with Process.

Content Items

For enterprise users, every site has a collection that contains digital assets and content items associated with the site. Content item components make it easy to add items to your site.

You can drag and drop digital assets and content items directly from the Content panel in the editor and the appropriate component is automatically used, whether for an digital asset image or for a structured content item.

Additional components selected from the Component panel let you dynamically display content items based on the content type.

- Content Item Component
- Content Placeholder
- Content List
- Content Search

Content Item Component

As a enterprise user, you can use a content item component to help lay out a page and set up page interactions until you are ready to add the content items themselves.

When you drag and drop a content item from the Content panel onto a page, it automatically inserts a content item component to hold the item. If you add the component first, you can drag the content item from the Content panel onto the component at a later time.

To add a content item component to a page:

1. Navigate to the page you want to edit and make sure that [toggle icon] is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon [menu icon], and choose **Settings**.

4. Use the General tab to modify spacing, alignment, and other presentation options.

   If a content item is assigned to the component, a thumbnail view of the content items is shown. If no content item is assigned yet, a placeholder image and message is displayed.

5. Choose from the following to set additional defaults for the content that's displayed.

   - **Version to use**: If you select **Use latest version of asset** and there is a newer, unpublished version of the content item, the newer version will be published automatically when the current site update is published. Unless specifically requested, all items will be the draft or latest versions.

   - **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout.

   - **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

   > ✎ **Note:**
   >
   > If you do not create a detail page, the link to display details is not shown for the content item in the default layout.

6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

Content Placeholder

As a enterprise user, you can use a content placeholder component to dynamically display content items of one or more types.

For example, you can use a content item placeholder on a designated detail page and when a user clicks a link to get more detailed information for a particular content item, it will automatically load the detail view for the associated content item. For example, if there is a page with multiple articles, each with a headline and image, and the user clicks a particular article, the detail page displays the full article regardless of which article is chosen.

To add a content placeholder component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Use the General tab to modify spacing, alignment, and other presentation options.

5. Choose from the following to set additional defaults for the content that's displayed.

   • **Content Type**: Select one or more of the available content types. The content types are those of the content items in the site collection.

   • **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout.

   • **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

   > **Note:**
   >
   > If you do not create a detail page, the link to display details is not shown for the content item in the default layout.

6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

Content List

As a enterprise user, you can use a content list component to dynamically display content items of a particular type.

For example, you can use a content item placeholder on a designated detail page and when a user clicks a link to get more detailed information for a particular content item,

it will automatically load the detail view for the associated content item. For example, if there is a page with multiple articles, each with a headline and image, and the user clicks a particular article, the detail page displays the full article regardless of which article is chosen.

To add a content placeholder component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Use the General tab to modify spacing, alignment, and other presentation options.

5. Choose from the following to set additional defaults for the content that's displayed.

    • **Content Type**: Select one of the available content types. The content types are those of the content items in the site collection.

    • **Maximum Items** and **Start at Item**: Specify the maximum number of items to display and where the display will begin. Additional items are not displayed.

    • **Pagination**: Specify if you want to include pagination options with the list. If selected, you can then tailor the way the pagination is displayed with buttons or page numbers and different labels if needed.

    • **Date**: Use the options provided to select content items to display based the item creation date before, after, between, or within selected dates or date ranges.

    • **Language**: Choose a language from those associated with the repository.

    • **Additional Query String** (optional): Specify additional query parameters to further refine the list of items displayed using a syntax similar to: `field.dept eq "Finance"`. See the table below for the list of available operators.

    • **Order By**: Sort the items either by name or date in ascending or descending order.

    • **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout.

    • **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

    > **✎ Note:**
    >
    > If you do not create a detail page, the link to display details is not shown for the content item in the default layout.

    • **List View**: Select a section layout to arrange the items. This list can include custom layouts. The following layouts are provided:

        – **Horizontal**: Arranges the items one after the other in a horizontal line.

  – **Vertical**: Arranges the items one after the other in a vertical line. This is the default if no layout is selected.

  – **Two Columns**: Arranges the items by twos in multiple rows.

  – **Three Columns**: Arranges the items by threes in multiple rows.

  Click the right arrow next to the selected layout to modify settings for the layout.

- **Empty List View**: Select how an empty list should be displayed.

- **Options**: choose if there should be an auto-refresh on the search query specified in the Content Search component.

- **Spacing**: Choose how the items will be displayed.

6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

Table 11-1   Query Operators

Operator	Example	Supported Data Types	Description
eq	`?q=name eq "John"` `?q=type eq "DigitalAsset"` `?q=type eq "Employee" and fields.DOB eq "1994/09/26T16:23:45.208"` `?q=type eq "Employee" and fields.DOB eq "1994/09/26T16:23:45.208"`	text, reference, number, decimal, boolean, datetime	Equals operator (eq) matches the exact value supplied in the query. This operator is not applicable to multivalued data types. The value provided with this operator is not case-sensitive except for standard fields. This operator considers even special characters in the value.

Table 11-1   (Cont.) Query Operators

Operator	Example	Supported Data Types	Description
co	`?q=(type eq "Employee" AND name co "john alex")` `?q=(type eq "Car" AND fields.features co "manual")`	text, reference, number, decimal, datetime, largetext	Contains operator (co) matches every word given in the criteria. The words are formed by splitting the value by special characters. It gives the results that have at least one of the words (in this example, john or alex or both). This operator does not consider special characters in the value while searching. This operator does not perform a search on stop words. Refer to Apache Lucene documentation to know more about stop words. This operator is applicable to *text, largetext* in case of single-valued attributes, whereas for multivalued attributes, it is applicable to *text, reference, number, decimal, datetime, largetext*. To understand the possible datetime formats, refer to the *Supported date/ datetime formats (24Hrs)* table below. The value provided with this operator is not case-sensitive.
sw	`?q=type eq "Employee" AND name sw "Joh"` `?q=type eq "Employee" AND fields.city sw "Los"`	text	Starts with operator (sw) matches only the initial character values given in the field condition. This operator is not applicable to multivalued data types. The value provided with this operator is not case-sensitive.

Table 11-1   (Cont.) Query Operators

Operator	Example	Supported Data Types	Description
ge	`?q=(type eq "Employee" AND fields.age ge "40")` `?q=type eq "DigitalAsset" AND updatedDate ge "20171026"`	number, decimal, datetime	Greater than or equal to operator (ge) matches only numeric and datetime values. To understand the possible datetime formats, refer to the *Supported date/ datetime formats (24Hrs)* table below. This operator is not applicable to multivalued data types.
le	`?q=(type eq "Employee" AND fields.weight le "60.6")`	number, decimal, datetime	Less than or equal to operator (le) matches only numeric and datetime values. To understand the possible datetime formats, refer to the *Supported date/ datetime formats (24Hrs)* table below. This operator is not applicable to multivalued data types.
gt	`?q=(type eq "Employee" AND fields.age gt "20")`	number, decimal, datetime	Greater than operator (gt) matches only numeric and datetime values. To understand the possible datetime formats, refer to the *Supported date/ datetime formats (24Hrs)* table below. To understand the possible datetime formats, refer to the *Supported date/ datetime formats (24Hrs)* table below. This operator is not applicable to multivalued data types.

Table 11-1   (Cont.) Query Operators

Operator	Example	Supported Data Types	Description
lt	`?q=(type eq "Employee" AND fields.age lt "20")` `?q=type eq "Employee" AND createdDate lt "1994/09/26T16:23:45.208"`	number, decimal, datetime	Less than operator (lt) matches only numeric and datetime values. To understand the possible datetime formats, please refer to the section: **Supported date/ datetime formats (24Hrs)**. This operator is not applicable to multivalued data types.

Table 11-1   (Cont.) Query Operators

Operator	Example	Supported Data Types	Description

mt	`?q=(type eq "Car" AND fields.review mt "petrol 20KMPL")`
	
	`?q=(type eq "Employee" AND name mt "Jo?n")`
	
	`?q=(type eq "Employee" AND name mt "Jo*")`
	
	`?q=(type eq "Employee" AND fields.role mt "senior*")`
		text, largetext	Phrase query or proximity search (matches) operator (mt) enables you to find words that are within a specific distance to one another. Results are sorted by best match. It is useful for searching content items when values given in the criteria "petrol 20kmpl" need to discover actual content that may contain "*petrol* fuel mileage runs *20KMPL* in the speed way". Matches operator also can use a wildcard within the given value and supports both single-character and multiple-character wildcard searches within a single value. Use ? for a single-character wildcard and * for multiple characters. Both "John" and "Joan" can be searched by "Jo?n" for a single character and "Jo*" for multiple characters.
			
			This operator is applicable to both single-valued and multivalued data types. This operator does not perform a search on stop words. Refer to Apache Lucene documentation to know more about stop words. The value provided with this operator is not case-sensitive.

Table 11-1   (Cont.) Query Operators

Operator	Example	Supported Data Types	Description
sm	`?q=(type eq "Employee" And fields.city sm "Rome")`	text, largetext	Similarity query operator. This operator allows searching for values that sound like specified criteria - also called fuzzy search, which uses by default a maximum of two edits to match the result. "Rome" is similar to "Dome". This operator is applicable to both single-valued and multivalued data types. The value provided with this operator is not case-sensitive.
AND	`?q=(type eq "Employee" AND name eq "John" AND fields.age ge "40")`	N/A	AND operator, can be used to put an AND condition between multiple query conditions. This takes precedence over OR.
OR	`type eq "Employee" AND name eq "John" OR fields.age ge "40"`	N/A	OR operator can be used to put an OR condition between multiple query conditions.
()	`?q=type eq "Employee" AND (name eq "John" AND fields.age ge "40")` `?q=type eq "Employee" AND ( (name eq "John" AND fields.age ge "40") OR fields.weight ge 60)`	N/A	Parentheses, enclosing operator to group the conditions in the criteria. This takes highest precedence, followed by AND, and then by OR.

Content Search

As an enterprise user, you can use a content search component and specify the actions returned by the search.

You can insert a customized search bar to change or refresh the content that's displayed on the page or choose another action, such as opening a search results page or displaying an alert.

To add a content search component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the content search component to the page.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**.

4. Use the General tab to modify placeholder text, spacing, alignment, and other presentation options.

5. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices for the font, border, background color, and so on.

6. If you want to use the search component to refresh data on the current page, add a Content List component to the page. Go to **Settings** and pick the content type and any other query information, such as number of items to display, whether to paginate the results, or lazy load on scroll (loading content as the page is scrolled). You can now go to View mode and try out the search.

7. If you want to use the search component to refresh data on the current page and you have more than one Content List component on the page, you'll need to turn off the auto-query on all content lists except for the one that will display results. Go to the Content List settings and uncheck **Auto-refresh on search query in Content Search component.**

8. If you want to have more than one content search component on a page (with each search component driving a certain content list for results), you must uncheck all auto-refresh options in the Content List components and use Trigger/Actions to associate the content search component to its respective content list.

9. For the search component, use the Link tab to associate actions with the component. Choose an option from the Select Link Type drop-down list. Select **Trigger Actions** then click **On search query** to see the available triggers or to create a new trigger. Select **Refresh Component**. Under **Query String** select **Search String** and pick the content list to use in the **Do this action in** option.

10. You can also use the content search component to pass the query to a search results page. On the Link tab of the search component, select **Search Page** to display a search result page. You can use the default page or link to a search result page that you created. Select the page from the Page drop-down list and choose the display actions for the page. You can tailor the results to a specific content type, open the results in a new window, and so on.

The following pointers can help you design an effective search results page:

- Create a page and designate it as a search page. By default, it's marked as hidden, but you can change the setting in the page properties.

- Edit the page and add a content list to the page. You can edit the settings for the content list, specifying a content type. Or the content type can be specified from the search component link settings (above). If you use the link settings, that lets you use a search results page that can show results from different content types, depending on which component is used to initiate the search.

- To edit the display, change the settings, such as choosing lazy load pagination (because the page will probably be used exclusively for search results).

- On the search results page, you can also put in a content search component. This will echo the search string used to launch the page, letting a user refine the search if needed.

Other Components

Let's look at some components that combine different type of content.

- Maps
- Headlines
- Articles
- Images with Text
- Component Groups
- Using Cobrowse on a Page
- Oracle Policy Automation
- Oracle Visual Builder Cloud Service

Maps

Add a map to your site to let users interactively explore the area around a location.

To add a map to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The Oracle map component shows a default location.

3. To change the location for the map and to adjust its display properties, click its menu icon and choose **Settings**.

4. Enter the starting **Location** for the map. You can use an address, zip code, or comma-separated latitude and longitude (for example, 40.5,-57.6)

   If you use an address, make sure you provide enough information to match a single location. If the address matches more than one location, the map remains blank.

5. Specify an initial **Zoom** level for the map. You can optionally allow the user to adjust the zoom level using a mouse, track pad, or on-screen controls.

6. Specify any style, alignment, and display options:

   • **Zoom**: Enable on-screen and device options to allow the user to adjust the zoom level of the map.

   • **Pan**: Enable on-screen and device options to allow the user to move the area of focus of the map.

   • **Display Marker**: Mark the starting location with a pin icon.

   • **Scale**: Include an indicator that shows the scale of the current zoom level.

   • **Overview**: Include an inset map that shows the current view in a larger context.

Headlines

You can add a headline to call attention to a certain spot on the site with title text and a supporting image and paragraph.

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page.

3. Click in the different areas of the component to add text. You add content to the main headline and the paragraph below the main headline. The text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.

4. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

5. To remove the formatting applied with these options, select the text and click .

6. To edit the component and its appearance, click its menu icon , and choose **Settings**.

7. Choose **Components** to set the details about the content that's displayed.

   • **Image**:

     – Click **Select** to use an image in the headline. Select an image from the site repository, an image from a documents folder that's been shared with you, or upload an image to a documents folder. Locate and select the image you want to use. If you don't see any digital assets, click , and change the collection filter to **All**. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the

file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing. Click **OK**. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

–   **Title**: Enter text you'd like to have displayed in a tooltip.

–   **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.

–   **Caption**: Enter a caption that appears under the image.

–   **Alignment, Width, and Spacing**: Change the layout of the image as needed.

•   **Title**: Change the spacing for the headline title.

•   **Paragraph**: Change the spacing for the text that appears under the headline.

8.   Use the General tab to modify spacing, alignment, and other presentation options.

9.   Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

Articles

You can add an article to your site, which combines the components of a headline, paragraph, and image in one easy-to-use component.

1.   Navigate to the page you want to edit and make sure that is set to **Edit**.

2.   Add the component to the page.

3.   Click in the different areas of the component to add text. You add content to the article headline and a sub-head below that. Then you can add the text of your article below the sub-heading. All text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.

4.   If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

5.   To remove the formatting applied with these options, select the text and click .

6.   To edit the component and its appearance, click its menu icon , and choose **Settings**.

7.   Choose **Components** to set the details about the content that's displayed.

•   **Image**:

–   Click **Select** to use an image in the article. Select an image from the site repository, an image from a documents folder that's been shared with you, or upload an image to a documents folder. Locate and select the image you want to use. If you don't see any digital assets, click , and change the collection filter to **All**. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to

the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing. Click **OK**. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

–   **Title**: Enter text you'd like to have displayed in a tooltip.

–   **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.

–   **Caption**: Enter a caption that appears under the image.

–   **Alignment, Width, and Spacing**: Change the layout of the image as needed.

•   **Title**: Change the spacing for the article title.

•   **Paragraph** (sub heading) and **Paragraph**: Change the spacing for the text that appears under the article title.

8.   Use the General tab to modify spacing, alignment, and other presentation options for the component.

9.   Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

Images with Text

You can add use the image and text component which combines the components of a paragraph and an image in one easy-to-use component.

1.   Navigate to the page you want to edit and make sure that is set to **Edit**.

2.   Add the component to the page.

3.   Click in the paragraph area of the component to add text. All text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.

4.   If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

5.   To remove the formatting applied with these options, select the text and click .

6.   To edit the component and its appearance, click its menu icon , and choose **Settings**.

7.   Choose **Components** to set the details about the content that's displayed.

•   **Image**:

–   Click **Select** to use an image. Select an image from the site repository, an image from a documents folder that's been shared with you, or upload an image to a documents folder. Locate and select the image you want to

use. If you don't see any digital assets, click ![icon], and change the collection filter to **All**. If you selected an image from a documents folder, you can link to the file rather than copying it to the site. To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing. Click **OK**. If you selected a digital asset, you can select a specific rendition. If you don't select a rendition, the original size will be used. If you want the latest version of the asset to be published when the site is published, select **Use latest version of asset**.

–   **Title**: Enter text you'd like to have displayed in a tooltip.

–   **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.

–   **Caption**: Enter a caption that appears under the image.

–   **Alignment, Width, and Spacing**: Change the layout of the image as needed.

•   **Paragraph**: Change the spacing of the text.

8.   Use the General tab to modify spacing, alignment, and other presentation options for the component.

9.   Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

Component Groups

You can combine one or more components to create a component group that you can name and reuse.

When you save a component group, the component group is saved as a custom component with the name you give it and it then appears in the list of custom components in the editor.

1.   Navigate to the page you want to edit and make sure that ![toggle] is set to **Edit**.

2.   Add a component group to the page. The component group is identified by ![icon].

3.   Drag and drop one or more components into the frame of the custom component.

4.   Position and size the components within the component group in the same way you do for components in a slot.

5.   To edit a component and its appearance, click its menu icon ![icon], and choose **Settings**. If you click the component name instead of the menu icon, you can see and select the menu icon for the component group (or slot):
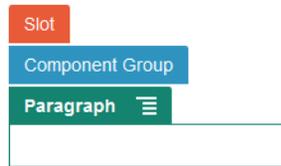
The Settings tab for the component group lets you specify the position of the component group, a background image, and other settings that apply to the entire component group.

6. When you are ready to save your changes to the component group, click the component group, click its menu icon , and choose **Save**.

    a. In the dialog, enter a name for the component group. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.

       If this is a new component group, you cannot use the name of an existing custom component.
       If you added an existing component group to the page, modified the component group, and then tried to save your changes, you are given the option to provide a name to create a new component group to select **Overwrite the existing component group** to update the existing component group with your changes.

    b. Click **Save**.

       The component group is saved with the specified name as a custom component. It appears in its own folder in the component manager and in the list of custom components in the editor if you are the owner or someone has shared the component with you. You can share the component group as you would any custom component.

Using Cobrowse on a Page

The Oracle Cobrowse Cloud Service is a collaboration tool that lets you share screens or initiate a cobrowsing session with another person. For example, you may want to include this on an order form so a representative can view a customer's screen while the customer is placing an order.

To use this feature, it must first be enabled for a site. There are two types of launcher scripts that can be enabled: one that uses a customized button (Launch Point 2) and one that uses the default Cobrowse button (Launch Point 1). You determine which kind of launcher will be used when you enable the feature for your site and add the necessary script. See Enable Cobrowse Integration for details.

After Cobrowse is enabled for a site, any page can be configured to allow cobrowsing.

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Click . Select the checkbox in the Cobrowse section.

3. Click **Close**.

If a Launch Point 1 script is enabled, when you next view the page, you'll see the default Cobrowse button appear or after pressing a hot key, if configured.

If a Launch Point 2 script is enabled, you need to add the custom button to the page.

1. Make sure that is set to **Edit**.

2. Add the component to the page. The Cobrowse Launcher component is listed in the Integration section of the components.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can adjust the label for the button, its appearance, size, and alignment. Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders. For more advanced styling, edit or add style classes in the `design.json` and `design.css` files in the theme designs folder of current site template. The style class prefix is `scs-cobrowse`.

After your site is published, your site visitors can use the Cobrowse button to initiate a session with a representative from your organization. The visitor clicks the Cobrowse button and is given a secure session ID. The visitor relays the ID via a phone call to a representative from your organization who has access to the Cobrowse Agent Console. The agent uses the console to initiate a session, which continues until either the visitor or the agent terminates it. When using a Launch Point 2 setting, the Launcher component has a fixed ID of cec-start-cobrowse. Use that ID in the Cobrowse console.

Notes on Usage

When using Cobrowse Instant Mode (ICB), video or embedded iFrames are not viewable on a page unless the iFrame content is enabled with the same Cobrowse site ID. As a result, some Content and Experience Cloud components are not rendered in the Cobrowse agent console in ICB mode. Use Cobrowse Advanced Mode (ACB) to render the following components:

- Video
- Youtube
- Document Manager
- Facebook Like
- Twitter Follow
- Twitter Share
- Facebook Recommend
- Conversation

A custom component that uses an iFrame to get content also does not render in Instant Mode.

See Cobrowse Overview in the *Cobrowse Deployment and Use Guide* for more information about Oracle Cobrowse Cloud Service. See Enable Cobrowse Integration for details about using Cobrowse with a secure site or one under development.

Oracle Policy Automation

Oracle Policy Automation is used to implement online 'interview" scenarios, such as feedback for troubleshooting or eligibility assessments for services. It delivers advice across channels by capturing rules in natural language Microsoft Word and Excel

documents, then building interactive customer service experiences called interviews around those rules.

Before you can use the Oracle Policy Automation feature, it must be configured and enabled. Your service administrator enables the feature for your service, including adding the host name, URL, user name, and password for the Oracle Policy Automation hub in use. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain. See Integrate with Oracle Policy Automation Cloud Service in *Administering Oracle Content and Experience Cloud*.

On the Oracle Policy Automation side, interviews must be created and stored on the host site. In addition, your Oracle Content and Experience Cloud service must be authorized for use by the Oracle Policy Automation host.

Once Oracle Policy Automation is configured and enabled, you can add an OPA component to a page on your site.

1. Navigate to the page you want to edit and make sure that ⬤ is set to **Edit**.

2. Add the component to the page. The component appears in the Integration section of the Component list.

3. To edit the component and its appearance, click its menu icon ☰, and choose **Settings**. You can adjust the label for the component, its appearance, size, and alignment. Use the Style tab to use the default style associated with the interview from the Oracle Policy Automation host. For more advanced styling, edit or add style classes in the design.css files in the theme designs folder of the current site template. The style class prefix is scs-opainterview-.

After your site is published, your site visitors will see the interactive interview that is chosen in the Oracle Policy Automation component. For more details about Oracle Policy Automation, see the Oracle Policy Automation library documentation.

Oracle Visual Builder Cloud Service

Oracle Visual Builder Cloud Service is a hosted environment for your application development infrastructure. It provides an open-source standards-based solution to develop, collaborate on, and deploy applications within Oracle Cloud.

Initial Steps

Before using Oracle Visual Builder Cloud Service, it must be enabled and configured. Your service administrator enables the feature for your service, including adding the host name for where the apps are created and stored. See Integrate with Oracle Visual Builder Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO, so both services must be in the same identity domain.

On the Oracle Visual Cloud Service side, the following must be done before this feature can be used with Oracle Content and Experience Cloud:

• Cross-Origin Resource Sharing (CORS) must be enabled on the Oracle Visual Cloud Service site.

• Apps must be created, made available for embedding, and must be configured for use with Oracle Content and Experience Cloud.

- Web applications must be created and made available for embedding in an iframe. The Sites SDK must be imported and referenced in the web applications. A page URL parameter called "id" must be added to the web applications.

Create VBCS Components

After the integration is enabled and apps and web applications are created and ready to use, you must create a new component for each app that you want to add to your site pages.

1. In Oracle Visual Builder Cloud Service, get the URL for the published web application. Click the live project that includes the web application, then click the web application. Copy the URL from the address bar.

2. In Oracle Content and Experience Cloud, click **Developer** and then click **View All Components**. Registered remote components and layouts are displayed.

3. Click **Create** and choose **Create Visual Builder Component**.

4. Enter a name for the component. You can't use a name used by another component or layout.

   You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with an underscore.

   Don't use the following names for templates, themes, components, sites, or site pages: authsite, content, pages, scstemplate_*, _comps, _components, _compsdelivery, _idcservice , _sitescloud, _siteclouddelivery, _themes, _themesdelivery. Although you can use the following names for site pages, don't use them for templates, themes, components, or sites: documents, sites.

5. Optionally, enter a description for the component.

6. Paste the URL to the live web application or live classic application.

7. Click **Create**. After the component is created, the name appears in the list of components. You can explore the folders and files that make up the component or layout by clicking the component name in the list .

8. To select an icon other than the default icon assigned to the component:

   a. Select the component from the list.

   b. Click **Properties**

   c. Click the **Component Logo** tab.

   d. Click a logo from the gallery of logos and then click **Done**.

Adding the Component to a Site Page

Now you can add the component for the app to one of your site pages. You can add the component to either a public or a secure page.

1. Navigate to the page you want to edit and make sure that is set to **Edit**.

2. Add the component to the page. The component appears in the Custom section.

3. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can adjust the label for the component, its appearance, size, and alignment. Use the Style tab to use the default style associated with the component from the Oracle Visual Builder Cloud Service host. For more advanced

styling, edit or add style classes in the design.css files in the theme designs folder of current site template. The style class prefix is scs-component.

You can view the component in preview mode while editing your site. After your site is published, your site visitors see the Oracle Visual Builder Cloud Service app chosen for use with that component, running in an iFrame on the page.

12
Troubleshoot

Here's where you'll find some answers to a few frequently asked questions.

Digital Assets

- I don't see any content types
- I see files in my assets list I don't recognize
- I don't see the asset or collection I need
- I can't delete a digital asset
- I can't delete a publishing channel

Sites

- I am trying to create a site, but there are no templates
- I can't delete a site
- I can't open the site tree or edit a page
- I added a component, but it doesn't show up on the page
- My folder, file, and conversation components don't work
- I uploaded a new version of an image, but it doesn't show up on the page
- I changed the page layout and some of my content disappeared
- I added a component based on another service but it isn't working

Troubleshoot Digital Assets

Here are some questions you might have when using digital assets.

- I don't see any content types
- I see files in my assets list I don't recognize
- I don't see the asset or collection I need
- I can't delete a digital asset
- I can't delete a publishing channel

I don't see any content types

Content types have to be shared with you in order for you to use them.

Content types can be created by anyone who has a content administrator role. After the type is created, it must be shared with others in order for them to use it. If you expect to see a content type but don't see it in the list when you try to create a content item, contact the person who created the type to make sure that it was shared.

I see files in my assets list I don't recognize

If a collection was shared with you, you'll see those assets in your asset list.

When you select **Assets** from the navigation menu, you see all assets that you can access. This includes any assets from a collection that was shared with you. You can find the collection where an asset is managed. Double-click on the asset to view the properties of the item. The collection and any tags associated with the asset are displayed.

I don't see the asset or collection I need

Your asset view and collection list shows those items you can access.

A collection can be associated with a website or it can be an independent collection, like one created for a project or event. A collection that's associated with a site is also associated with the repository that was chosen when the site was created. Check to make sure you are looking in the right repository when you view a collection list.

All users can view a collection when filtering assets, but you can only see those collections you can manage in the collection list. If you don't see a collection listed when you click **Collections**, you don't have a manager role for that collection.

I can't delete a digital asset

The **Delete** option may not appear when you select a digital asset.

Assets that are published cannot be deleted because they may be in use. You may also not have the appropriate role needed to delete an asset. For example, if you have a Viewer role in a repository, you're limited in what you can do with assets.

I can't delete a publishing channel

Publishing channels can be created using the administration options on the navigation menu, or they can be created when a site is created.

You can delete a publishing channel that does not have any published assets. If assets have been published, you can't delete the channel. You also can't delete a publishing channel that was created when a site was created. You must delete the site to delete that kind of channel.

Troubleshoot Sites

You may have some questions about creating sites. Here's some answers for you.

- I am trying to create a site, but there are no templates
- I can't delete a site
- I can't open the site tree or edit a page
- I added a component, but it doesn't show up on the page
- My folder, file, and conversation components don't work
- I uploaded a new version of an image, but it doesn't show up on the page

- I changed the page layout and some of my content disappeared
- I added a component based on another service but it isn't working

I am trying to create a site, but there are no templates

Templates must be installed and shared before you can create a site.

The templates provided with Oracle Content and Experience Cloud must be installed and shared by an administrator before you can use them. Contact your administrator.

Similarly, when you create a template, whether by importing, copying, or creating from a site, the template can't be used by anyone else until you explicitly share it.

See Configuring Site Settings in *Administering Oracle Content and Experience Cloud*.

I can't delete a site

Here are some reasons why you may not be able to delete a site:

- The site is online.

  First, take the site offline and then delete it. You must have the manager role for a site to take the site offline.

- You don't have the required privileges.

  You can delete a site if you created the site (you're the site owner) or if someone has shared a site with you and has given you the contributor or manager role.

  See Manage Sites and Site Settings for details.

I can't open the site tree or edit a page

The site editor opens in preview mode by default, which allows you to view the site, but not edit it. You can only edit a site if the editor is in edit mode.

Make sure that is set to **Edit**.

I added a component, but it doesn't show up on the page

There are several possible reasons for this.

- Verify that the URL associated with a remote component (app) is valid. See Register Remote Components.

- The editor encloses remote components in an HTML element called an inline frame (iframe tag). Not all remote components allow being enclosed in an inline frame.

  Check with the component provider to find out if it can be enclosed in an inline frame.

My folder, file, and conversation components don't work

Components that communicate with Oracle Content and Experience Cloud require certain resources and settings.

The following components require access to resources in Oracle Content and Experience Cloud:

- Folder list

- File list

- Documents manager

- Conversation

Folder and file components require access to the REST application programming interface (API).

Verify the following:

- The component must have access to the API endpoint to access folder and file REST operations.

  By default, the Oracle Content and Experience Cloud REST API endpoint is available if you use the standard URL provided for the site. If you use a custom URL, you may have to explicitly provide access to the /documents REST API endpoint.

  See How do I map a site URL?

I changed the page layout and some of my content disappeared

If you choose a layout with fewer or differently named slots, existing content in other slots won't display in the new layout.

The content isn't deleted, it just can't be displayed unless the layout you choose has a slot with the same name.

Make sure you choose a layout with the same number of slots. If the layout you choose has the same number of slots, but some of your content still does not display, it's likely the slots have different names. Contact the theme designer to resolve the discrepancy.

I uploaded a new version of an image, but it doesn't show up on the page

When you select an image to use with a component, a unique copy is created and stored with the site.

When you upload files, they are stored in the site repository. If you upload a file with the same name as an existing file, it creates a new version of the file.

The image file you see on the page is a copy of the file selected from the repository and is not automatically updated. This is by design and prevents inadvertent changes in existing pages when an image file is updated in the repository.

To update the image used with the component, you must explicitly select the image from the component property page. See Images for details.

I added a component based on another service but it isn't working

You can integrate your site with several different processes and services.

If you created a component based on integration with Process Cloud Service, Oracle Policy Automation, and other services, both services must use the same identity domain. Check with the person who set up the integration to verify that the two services use the same identity domain.