PeopleSoft Interaction Hub 9.1: Content Management System

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PeopleSoft Interaction Hub 9.1: Content Management System
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

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- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	*Description*
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

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- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

About PeopleSoft Interaction Hub

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Interaction Hub and PeopleTools.

PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

PeopleSoft Interaction Hub

Oracle's PeopleSoft Interaction Hub is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Interaction Hub is ideal for customers wishing to deploy an unlimited number of communities across an enterprise that focusses on PeopleSoft application business processes.

PeopleSoft Interaction Hub 9.1 contains a rich set of Web 2.0 features. For instance, collaborative workspaces and related content services can be keyed to PeopleSoft application transactions providing contextually relevant collaboration.

Two key characteristics distinguish PeopleSoft Interaction Hub as a rich Web 2.0 platform:

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- First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.
- Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Interaction Hub and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Interaction Hub, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the subject areas and sections that are devoted to portal functionality. Because PeopleSoft Interaction Hub builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Interaction Hub suite of documentation builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft HRMS or Oracle's PeopleSoft CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search, content management, navigation, and homepage personalization.

Product documentation for PeopleTools covers the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *PeopleTools: Portal Technology*.

Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.
- PeopleTools documentation.

PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- *PeopleSoft Interaction Hub: Branding*

  This subject covers PeopleSoft Interaction Hub’s branding feature, which is built on the PeopleTools branding framework. Branding enables you to create branding definitions and apply branding themes to portals, sites, and workspaces allowing you to create a differentiated appearance for specific user audiences.

- *PeopleSoft Interaction Hub: Collaborative Workspaces*

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This subject covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

- *PeopleSoft Interaction Hub: Content Management System*

  This subject describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

- *PeopleSoft Interaction Hub: Portal and Site Administration*

  This subject covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

- *PeopleSoft Interaction Hub: Using Portal Features*

  This subject covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Interaction Hub.

PeopleTools Documentation

PeopleSoft Online Help for PeopleTools contains the complete set of subject areas covering PeopleTools 8.53. In particular, several of these subjects are useful to the setup, administration, and use of PeopleSoft Interaction Hub including:

- *PeopleTools: Feed Publishing Framework*

  The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Interaction Hub data as feeds. In addition, the framework can be used to develop custom feed types.

- *PeopleTools: Integration Broker*

  PeopleSoft Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *PeopleTools: Portal Technology*

  PeopleTools portal technology is the foundation of the PeopleSoft Interaction Hub product. This subject covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the PeopleSoft Related Content Framework, and others.

- *PeopleTools: Security Administration*

  This subject covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *PeopleTools: Applications User's Guide*

  This subject provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture,

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explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

Note: These subjects and others in the PeopleSoft Online Help are referenced as needed.

PeopleSoft Portal Solutions Related Links

PeopleSoft Interaction Hub 9.1 Documentation Home Page [ID 887960.1]

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

Follow Us

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	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

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Chapter 1

Understanding the Content Management System

PeopleSoft Interaction Hub Content Management System Features

The Oracle PeopleSoft Interaction hub enables you to organize all your content-creation processes and their results. Content Management includes features to help you manage, create, and organize content, as well as manage crawling, approvals, versioning, multiple user access, and publication processes. The resulting content is ready and available for placement in various portal pagelets, including News Publications, Related Information, and Browsing Categorized Content.

The portal's Content Management and Publication system includes the following types of features:

- *Managed Content:* This feature enables you to organize content in folders, create content, and share content with other users.

  The system offers a check-in checkout function, version controls to safeguard editions of content, and a submission and approval process that culminates in content and available for publishing to a wider portal audience.

- *Content Categorization:* This feature enables you to access web server and file server content, or content management entries through a detailed categorization hierarchy.

  The PeopleSoft Interaction hub uses a crawler to automatically populate the hierarchy.

- *News Publications:* This feature enables you to organize approved content in multiple publications, which are viewable as pagelets on the portal.

  Content can be imported from Managed Content folders or created within the publication feature itself. New content goes through a submittal process, which can include author and editor revisions, and can be published to a pagelet and removed according to specific dates.

- *Web Publishing:* The content of any publication—including web magazines, employee handbooks, business procedures, newsletters, and customer surveys—can be maintained in its entirety in your PeopleSoft portal and dynamically deployed to your audience based on their roles within and outside your organization.

- *Open Content Services:* This feature enables you to integrate third-party content management system content into the portal.

  Content contributors, editors, approvers, and publishers can leverage the third-party content management facilities to create, edit, approve, and deploy content and to have the content metadata pushed to the PeopleSoft Interaction hub.

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See “Understanding Public Web Services” (Portal and Site Administration).

In addition to these features, the PeopleSoft Content Management system enables you to access and view managed content that is shared by other PeopleSoft Interaction hub features. The following table describes these features:

Content Management Feature	***Description***
Collaborative Workspace	A Collaborative Workspace is a virtual team room, which is used to facilitate the completion of a project. A Collaborative Workspace can include modules such as discussion threads, a member directory, and documents to enable team members to collaborate online. See *PeopleSoft Interaction Hub: Collaborative Workspaces*
Discussion Forum	Discussion Forum provides a platform where discussion groups can be created and participants can post topics and replies. Participants can monitor the groups to which they belong through the Discussion Forum pagelet on the homepage. See “Using the Discussions Module” (Collaborative Workspaces).
Manage Navigation	Manage Navigation provides an interface to the portal registry for tasks that are specific to the current site, based on site defaults. Authorized site administrators can manage their site's content and navigation without having access to the registry for other sites or to the default portal. See “Managing Site Navigation” (Portal and Site Administration).
Menu Item Requests	Menu Items are pages, websites, or files that are accessible from the navigation menu. The Menu Item Requests feature enables portal users to contribute information to their organization's intranet by submitting a menu item request for a file attachment, managed content, a website URL, or a PeopleSoft URL. See “Submitting or Editing Menu Item Requests” (Using Portal Features).
Pagelet Wizard	The Pagelet Wizard supports the creation of pagelets from a wide variety of data sources. Supported data sources include PSQuery, general URL, Integration Broker, HTML, Managed Content (HTML or text), Navigation Collection, and Java. See “Action Items Overview” (Using Portal Features)

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Content Management Feature	***Description***
Related Information	The Context Manager enables a pagelet to be loaded with information based on the target page or transaction. The Related Information pagelet takes advantage of the Context Manager. The content that is made available with this pagelet includes external URLs, menu items, and managed content. See “PeopleTools Related Content Framework” (Using Portal Features). “Delivered Related Content Services” (Using Portal Features)
Action Items	The Action Items feature enables you to create and track action items, as well as collaborate with other users. Action items are assignments or tasks that are assigned to people across groups and require some sort of activity, monitoring, or event to take place before they can be considered complete. Items can be tracked through summary homepage pagelets and inquiry pages, as well as through email notification and calendar entries. See “Action Items Overview” (Using Portal Features).
Community Calendar Events	Community calendars provide a way for groups to share, organize, and communicate about events that pertain to their organization or group. Calendar membership can be assigned for users or roles and have different privileges including the ability to view, create, and edit the events for a calendar. Users can view calendars online in pagelets, the full-page view accessible from the pagelet, or the menu navigation. Community calendars can be accessed from portals, sites, and workspaces. See “Understanding Community Calendars” (Using Portal Features).

While these features provide many possibilities for content management and publishing, they are based on a single foundation system and underlying technology—the PeopleSoft Interaction hub. Portal administrators identify where documents can be stored, how to divide and manage content management responsibilities, and how the user navigates the content management system.

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Chapter 2

Setting Up the Content Management System

Understanding Setup of the Content Management System

The implementation of PeopleSoft Interaction hub Content Management requires the following initial setup steps:

1. Identify how to divide and manage responsibilities.

   Responsibilities are divided by privilege sets. Specific duties, such as adding folders and publishing content, are assigned to privilege sets on the Privilege Sets page. Privilege sets list the actions that a user can perform on a folder or the content that is located in that folder. When you're creating each content management folder, these privilege set definitions are associated with member roles and user IDs.

   Privilege sets are segregated by content management features, and each feature requires a top administrator to create its top folders. The user IDs on the Top Administrators page define who can create the top folders.

   Note: Oracle delivers a number of permission lists to support Content Management-related features. These features are discussed in detail in the *PeopleTools: Portal Technology*

   See "Summary of Delivered Security Data" (Portal and Site Administration).

2. Identify where document content can be stored.

   Administrators register Content Management storage locations on the Define File Storage page. You can store content on File Transfer Protocol (FTP) file servers or in database binary large objects (BLOBs). The choice of URLs is based on the information from the URL Maintenance page that is found in the **PeopleTools** > **Utilities** > **Administration** > **URLs** menu path.

   See File Storage Page.

   See *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities," Using Administration Utilities, URL Maintenance.

3. Identify where image attachments can be stored.

   PeopleSoft Interaction hub can upload, access, and render image files by way of an FTP service. To render image files as actual images, the FTP service must exist in a web server directory in the PeopleSoft domain.

Note: The web server directory extension and the FTP service should be installed only on a single web server that is used by the PeopleSoft Interaction hub database. For clustered web servers, all image attachments are rendered and stored on a selected single web server.

See *PeopleTools: Security Administration*, "Understanding PeopleSoft Security."

See *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities," Using Administration Utilities.

See *PeopleTools: PeopleCode Developer's Guide*, "Working With File Attachments," Using File Attachments in Applications, File Attachment Architecture.

Related Links

Setting Up an FTP Service for Image Attachments

Administering the Content Management System

This section discusses the organization of content-creation processes and the resulting content in the Content Management system.

Pages Used to Administer the Content Management System

Page Name	***Definition Name***	***Usage***
Top Administrators Page	EPPCM_TOP_CAT_ADMN	Assign specific users who will be able to create top folders within the Content Management system. A top administrator must be defined for each Content Management-based feature that is actively being used.
Privilege Sets Page	EPPCM_PRIVILEGES	Define the security privilege sets to secure row-level access to a specific feature in the Content Management system.
Folder Properties Page	EPPCM_CATG_MAIN	Set the properties for a new folder or to update property details for an existing folder. Use the Folder Properties page for top folders as well as for subfolders.
Folder Securities Page	EPPCM_CATG_MEM	Manage the folder members and their privileges. This page lists the members and privilege sets for the current folder.

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Page Name	Definition Name	Usage
Folder Security - Set Members Privileges Page	EPPCM_CATG_PRIV	Assign privilege sets for the current folder.
Viewer Roles Page	EO_PE_ROLE_TBL	Define the viewer (audience) roles to use to secure published content.
File Storage Page	EPPCM_DEFAULT_URL	Define the storage location for file attachments in the Content Management system.
URL Maintenance Page	URL_TABLE	Set up the FTP URL addresses or record names of the document repositories. This setup must be done before you access the Content Management setup pages; it is the responsibility of the system administrator.
Purge/Inactivate	EPPCM_PRG_RUN	Purge content or folders, inactivate content, unpublish content, or delete versions from the Content Management system.

Understanding Administration of the Content Management System

PeopleSoft Interaction hub enables you to organize your content-creation processes and the resulting content. PeopleSoft Interaction hub’s Content Management system includes features for content creation, content versions, approval, organization, publication, automatic acquisition (crawling), and management. The resulting content is ready and available for placement in various portal pagelets, including news publications, related information, and categorized content.

Before content can be created, published, and used, the Content Management system folder hierarchy and privilege sets must be set up by administrators. Depending on the needs of the site, the tasks of administering the Content Management system can be distributed across multiple administrator roles.

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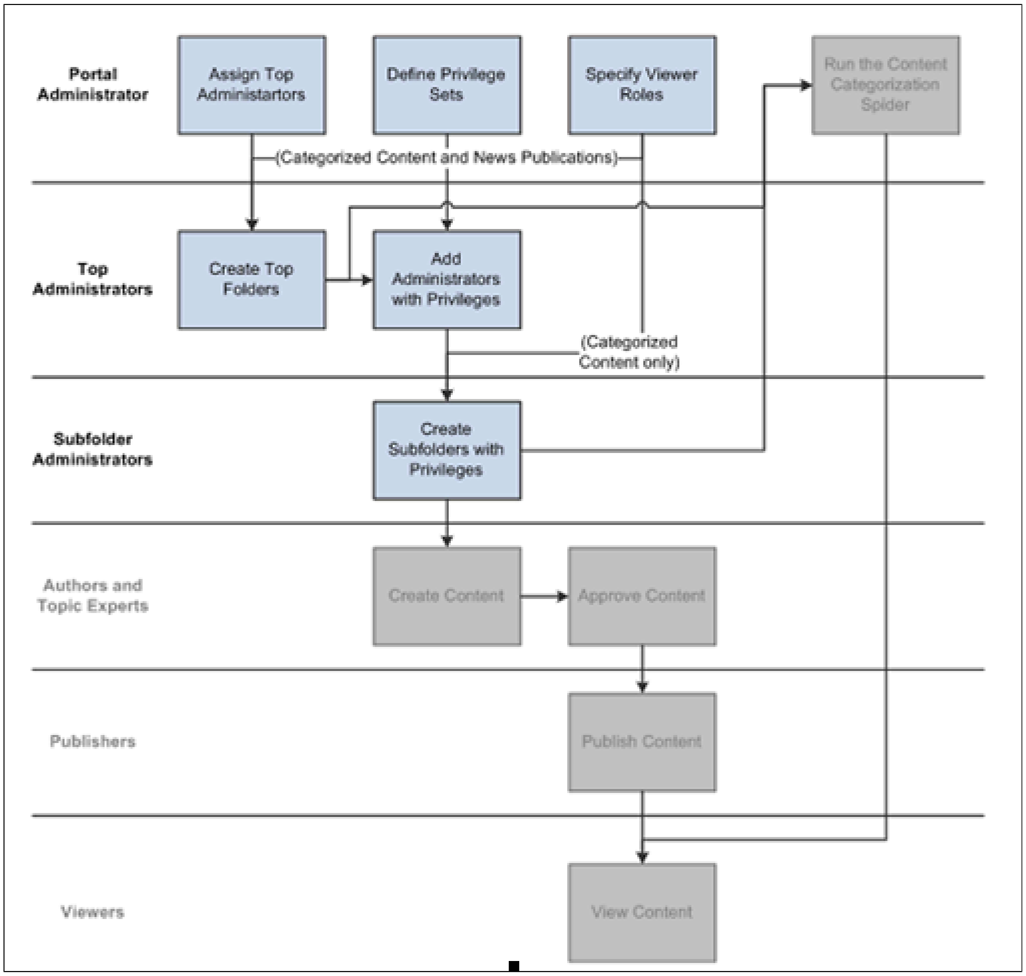
This example illustrates the Content Management system folder hierarchy and privilege settings that must be set up by administrators before content can be created, published, and used.



The following list highlights the administration tasks by role:

1. Assign top administrators for each feature of the Content Management system (portal administrator).

2. Define privilege sets for each feature of the Content Management system (portal administrator).

3. Specify viewer roles for viewing published content from the Content Management system (portal administrator).

4. Create the top folders for a feature (top administrators by feature).

5. Set top folder properties, add administrators, and set privileges to each top folder (top administrators by feature).

6. Create subfolders, set folder properties, and assign privileges for each of those subfolders (subfolder administrators).

Top Administrators Page

Use the Top Administrators page (EPPCM_TOP_CAT_ADMN) to assign specific users who will be able to create top folders within the Content Management system.

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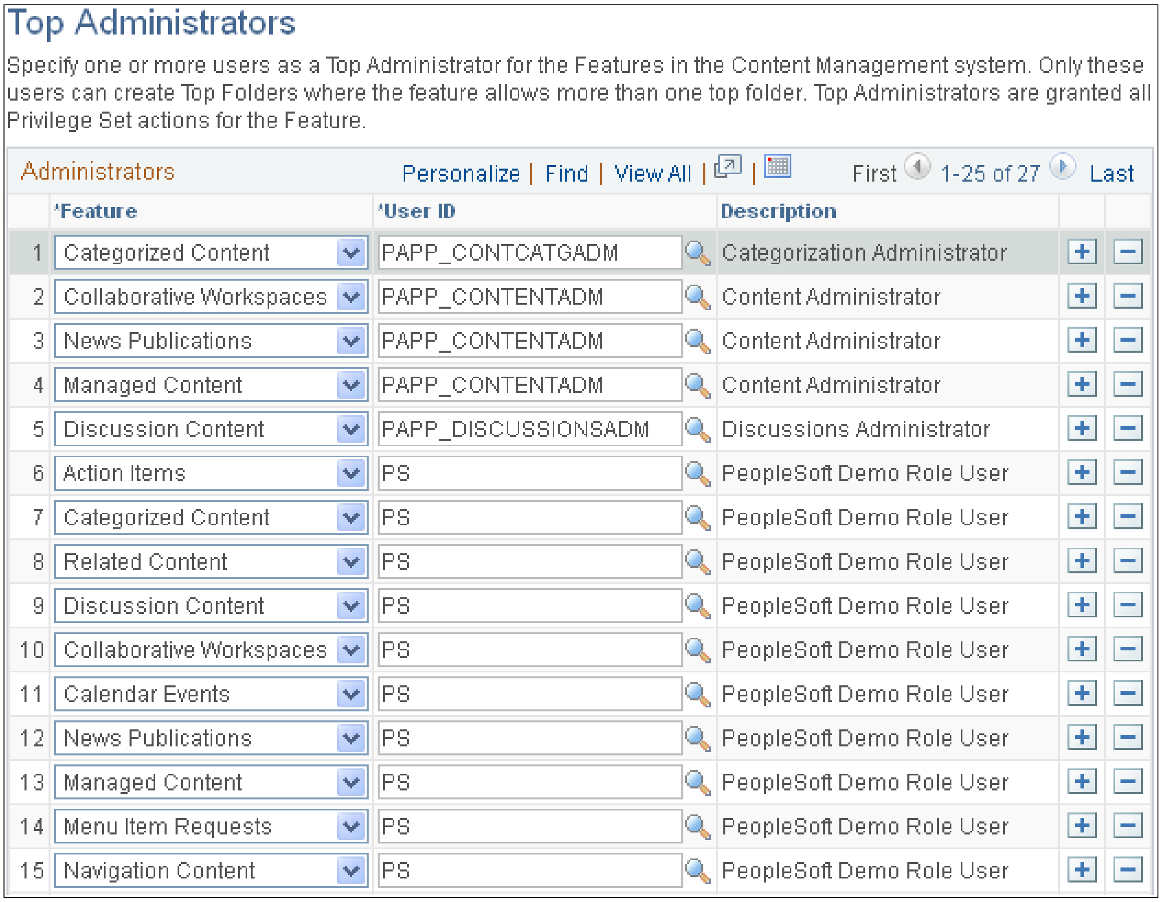
A top administrator must be defined for each Content Management-based feature that is actively being used.

Navigation:

Content Management > **Administration** > **Top Administrators**

This example illustrates the fields and controls on the Top Administrators page. You can find definitions for the fields and controls later on this page.


Top Administrators

Specify one or more users as a Top Administrator for the Features in the Content Management system. Only these users can create Top Folders where the feature allows more than one top folder. Top Administrators are granted all Privilege Set actions for the Feature.

Administrators Personalize | Find | View All | | First 1-25 of 27 Last

	*Feature	*User ID	Description
1	Categorized Content	PAPP_CONTCATGADM	Categorization Administrator
2	Collaborative Workspaces	PAPP_CONTENTADM	Content Administrator
3	News Publications	PAPP_CONTENTADM	Content Administrator
4	Managed Content	PAPP_CONTENTADM	Content Administrator
5	Discussion Content	PAPP_DISCUSSIONSADM	Discussions Administrator
6	Action Items	PS	PeopleSoft Demo Role User
7	Categorized Content	PS	PeopleSoft Demo Role User
8	Related Content	PS	PeopleSoft Demo Role User
9	Discussion Content	PS	PeopleSoft Demo Role User
10	Collaborative Workspaces	PS	PeopleSoft Demo Role User
11	Calendar Events	PS	PeopleSoft Demo Role User
12	News Publications	PS	PeopleSoft Demo Role User
13	Managed Content	PS	PeopleSoft Demo Role User
14	Menu Item Requests	PS	PeopleSoft Demo Role User
15	Navigation Content	PS	PeopleSoft Demo Role User

Use this page to assign specific users who will be able to create top folders within the Content Management system. A top administrator must be defined for each Content Management-based feature that is actively being used.

For example, within the Categorized Content feature, at least one user must be able to create top folders to delegate more specific responsibilities within those top folders. Similar top administrator responsibilities must be assigned for managed content, news publications, discussion forums, and other features.

Note: The top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned member.

Field or Control	*Description*
Feature	Use the drop-down list box to select a feature for this privilege set. Available features are: • *Categorized Content* • *Collaborative Workspace* • *Discussion Forum* • *Manage Navigation* • *Managed Content* • *Menu items* • *News Publications* • *Pagelet Wizard* • *Related Information* **Note:** For non-Content Management features, such as Discussion Forum, top administrators can view the content through Content Management.
User ID	Use the search icon to select the user who is to be granted top folder authorization for the corresponding feature. For Discussion Forum, the search prompt limits the selection to users who have security access to the browse component. **Note:** You can also enter a value manually.
Description	Display the description for this privilege set. This value is set in the Folder Properties - Security page.

Privilege Sets Page

Use the Privilege Sets page (EPPCM_PRIVILEGES) to define the security privilege sets to secure row-level access to a specific feature in the Content Management system.

Navigation:

Content Management > **Administration** > **Privilege Sets**

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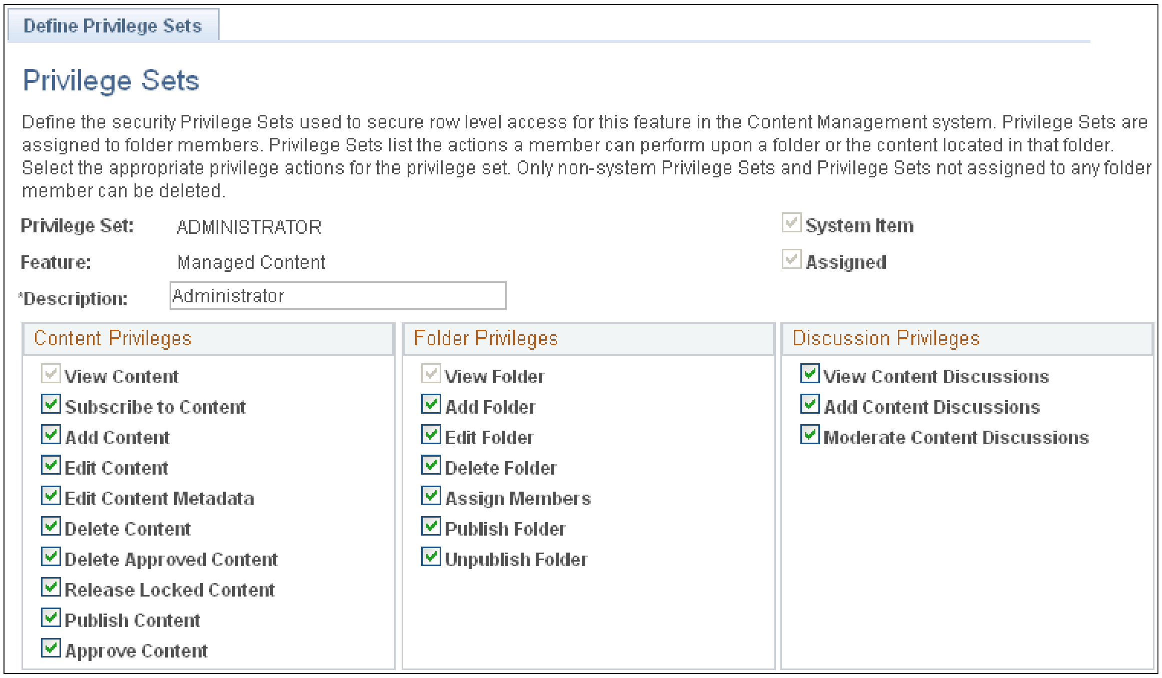
This example illustrates the Privilege Sets page. You can find definitions for the fields and controls later on this page.



Use this page to create and maintain privilege sets, which are unique to each Content Management feature. Within each privilege set, three groupings of privileges are available: content privileges, folder privileges, and discussion privileges. Each privilege controls the visibility of an action button on the folder and content management pages. You typically need to set up the administrator privilege set for each feature.

Note: Some features require additional privilege sets such as author (or contributor), expert (or approver), and viewer. Some privileges may not apply to every feature.

Field or Control	***Description***
Privilege Set	Displays the unique privilege set name that is entered on the search page.

Field or Control	*Description*
Feature	Displays the selected feature for this privilege set. The available options are: • *Categorized Content* • *Collaborative Workspace* • *Discussion Forum* • *Manage Navigation* • *Managed Content* • *Menu Items* • *News Publications* • *Pagelet Wizard* • *Related Information*
Description	Enter a meaningful description for this privilege set. This description appears on the Folder Properties - Security page.
System Item	Indicates whether this privilege set is used by the system. **Note:** Only non-system privilege sets can be deleted.
Assigned	Indicates whether this privilege set is currently assigned to a folder member. **Note:** Privilege sets that are assigned to folder members *cannot* be deleted.

Content Privileges

Use this section to select the content privileges for this privilege set.

Field or Control	*Description*
View Content	Select to provide read-only access to content and the ability to send email notifications. The system automatically assigns the view privilege.
Subscribe to Content	Select to enable the user to add members to the interested party list.

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Field or Control	*Description*
Add Content	Select to enable the user to add new content to a folder and edit his or her authored versions.
Edit Content	Select to enable the user to check out and edit content.
Edit Content Metadata	Select to enable the user to edit the descriptive attributes, but not the content detail itself.
Delete Content	Select to enable the user to delete content from a folder.
Delete Approved Content	Select to enable the user to delete content that is approved or that is pending approval.
Release Locked Content	Select to enable the user to release content that is checked out by another user.
Publish Content	Select to enable the user to publish, reject, or submit content for rework. This option is applicable to the Company News Publication feature.
Approve Content	Select to enable the user to approve, reject, or mark content for rework. This option is applicable to the Workgroups feature.

Folder Privileges

Use this section to select the folder privileges for this privilege set.

Field or Control	*Description*
View Folder	Select to provide read-only access to content and the ability to send email notifications.
Add Folder	Select to enable the user to add a new folder below a top folder.
Edit Folder	Select to enable the user to change the properties of a folder.

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Field or Control	***Description***
Delete Folder	Select to enable the user to delete a folder.
Assign Members	Select to enable the user to assign members and their privilege sets to a folder.
Publish Folder	Select to enable the user to publish the folder as a pagelet or publish to the left navigation as a menu item.
Unpublish Folder	Select to enable the user to unpublish a published folder. The user must have security access to the content reference to unpublish it.

Discussion Privileges

Use this section to select the discussion privileges for this privilege set.

Field or Control	***Description***
View Content Discussions	Select to provide read-only access to discussion forums.
Add Content Discussions	Select to enable the user to add new discussion topics and responses to forums that he or she can access.
Moderate Content Discussions	Select to enable the user to edit and remove posts in addition to adding topics and responses.

Folder Properties Page

Use the Folder Properties page (EPPCM_CATG_MAIN) to set the properties for a new folder or to update property details for an existing folder.

Navigation:

Content Management > **Managed Content** > **Browse Folder**

Click the **Add Top Folder** button.

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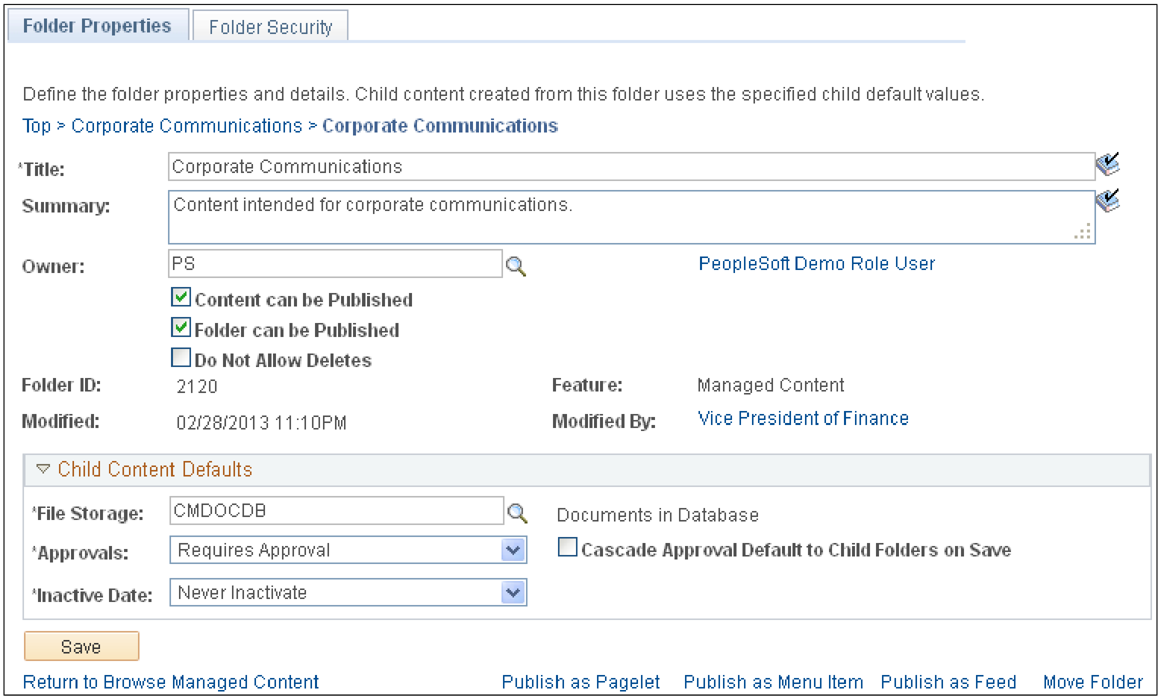
This example illustrates the fields and controls on the Folder Properties page. You can find definitions for the fields and controls later on this page.



Use this page to set the properties for a new folder or to update property details for an existing folder.

Note: The Folder Properties page is used for top folders as well as for subfolders.

Users can add folders at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders.

Field or Control	***Description***
Title	Enter the desired information.
Summary	Add a brief description of the content. This field supports HTML entries.
Owner	Assign the owner of the content. Click the name link of the owner to access the Instant Message page, where you can send an instant message to the owner.

Field or Control	*Description*
Content can be Published	Select to enable approved content to be imported and published in features outside of managed content. You must select this option for publishing features to import or reference managed content. **Note:** If you want approved content to remain private, you can create a development or work-in-progress folder that is nonpublishable. As content is completed and approved, you can then add a new publishable folder location for the content. The development folder should have only publishing and viewing members. See Content Locations Page.
Folder can be Published	Select to allow for publishing of this folder as a pagelet or menu item. **Note:** Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the **Publish as Pagelet, Publish as Feed,** and **Publish as Menu Item** links.
Do Not Allow Deletes	Select to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.
File Storage	Select the document storage location for the folder's child content. The value appears by default from entries set up for attachment locations. As delivered, two locations are set up: one for storage of attachments in a database table and another as a file server placeholder. The file server choice will not function properly until you edit the URL entry with your server information. The database storage choice functions for the underlying database table that exists within the PeopleSoft Interaction hub. See Understanding Setup of the Content Management System.

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Field or Control	***Description***
Approvals	This field determines the approval mode for the folder. Available options are: • *Requires Approval:* All content in the folder must be approved. • *Auto-Approved Content:* The system automatically marks content as approved. • *Optional Approval:* As content is being created, content authors can choose to require approval or have the content automatically approved. **Note:** This setting cannot be changed after content has been created. If you need to change the approval setting, you must delete the content and add it again with the new approval setting.
Inactivate Date	Select the default inactivation date for content created in this folder. Content with an archive date previous to the current date does not show in the content list in the Browse Content or My Content pages. However, the content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. Publishing features such as News Publication and Categorized Content use the expiration date to control when the content no longer appears. Select a default inactivation date for content created in this folder from the following values: • *Current Date* • *Current Date + 1 Week* • *Current Date + 30 Days* • *Current Date + 90 Days* • *Current Date + 365 Days* • *Current Date + 999 Days* • *Never Archive*

Folder Securities Page

After you set the properties for a new folder or to update property details for an existing folder, you add a member to the folder with administrator privileges. The administrator privilege allows this user to create subfolders within the new top folder among other administrative privileges.

Use the Folder Securities page (EPPCM_CATG_MEM) to manage the folder members and their privileges.

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This page lists the members and privilege sets for the current folder.

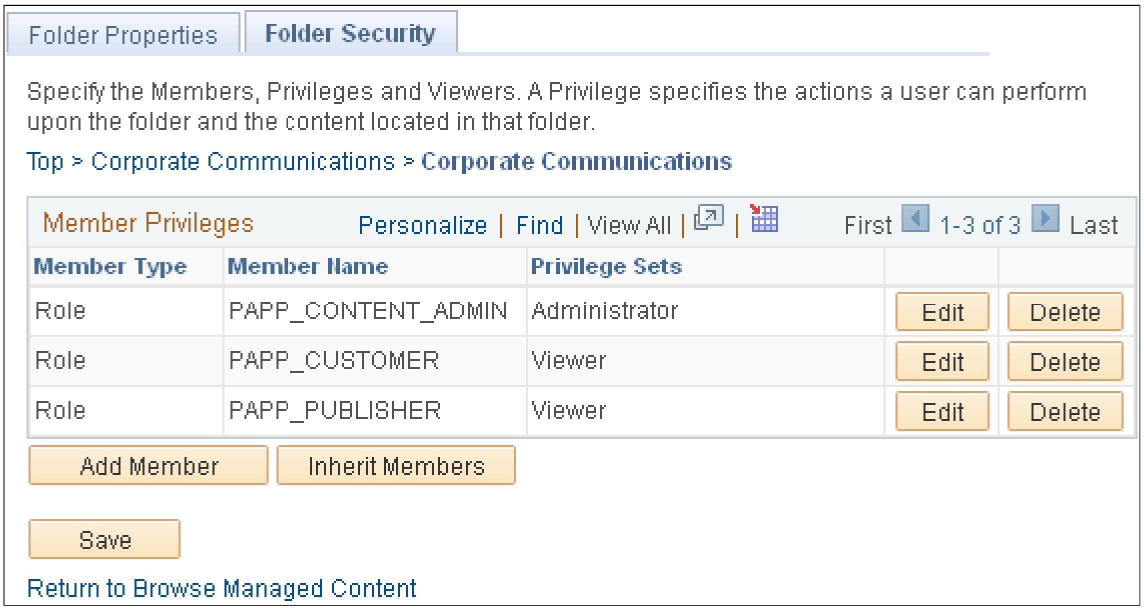
Navigation:

Content Management > **Managed Content** > **Browse Folder**

Click the **Add Top Folder** button.

Select the Folder Security tab.

This example illustrates the fields and controls on the Folder Securities page. You can find definitions for the fields and controls later on this page.



Use this page to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page. A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

Note: A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member of a folder.

See Administering the Content Management System.

Field or Control	***Description***
Edit	Click to edit the privileges of this member.
Delete	Click to remove the member and prohibit him or her from accessing content from this folder.

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Field or Control	***Description***
Add Member	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform upon the folder and the content located in that folder.
Return to Browse Managed Content	After you finish creating a top folder in the Managed Content feature, click this link to return to the Browse Managed Content page. The folder that you created now appears as a top folder in the Managed Content feature.

Folder Security - Set Members Privileges Page

Use the Folder Security - Select Member Privileges page (EPPCM_CATG_PRIV) to assign privilege sets for the current folder.

Navigation:

Content Management > **Managed Content** > **Browse Folder**

Click the **Add Top Folder** button.

Select the Folder Security tab.

Click the **Add Member** button or the **Edit** button.

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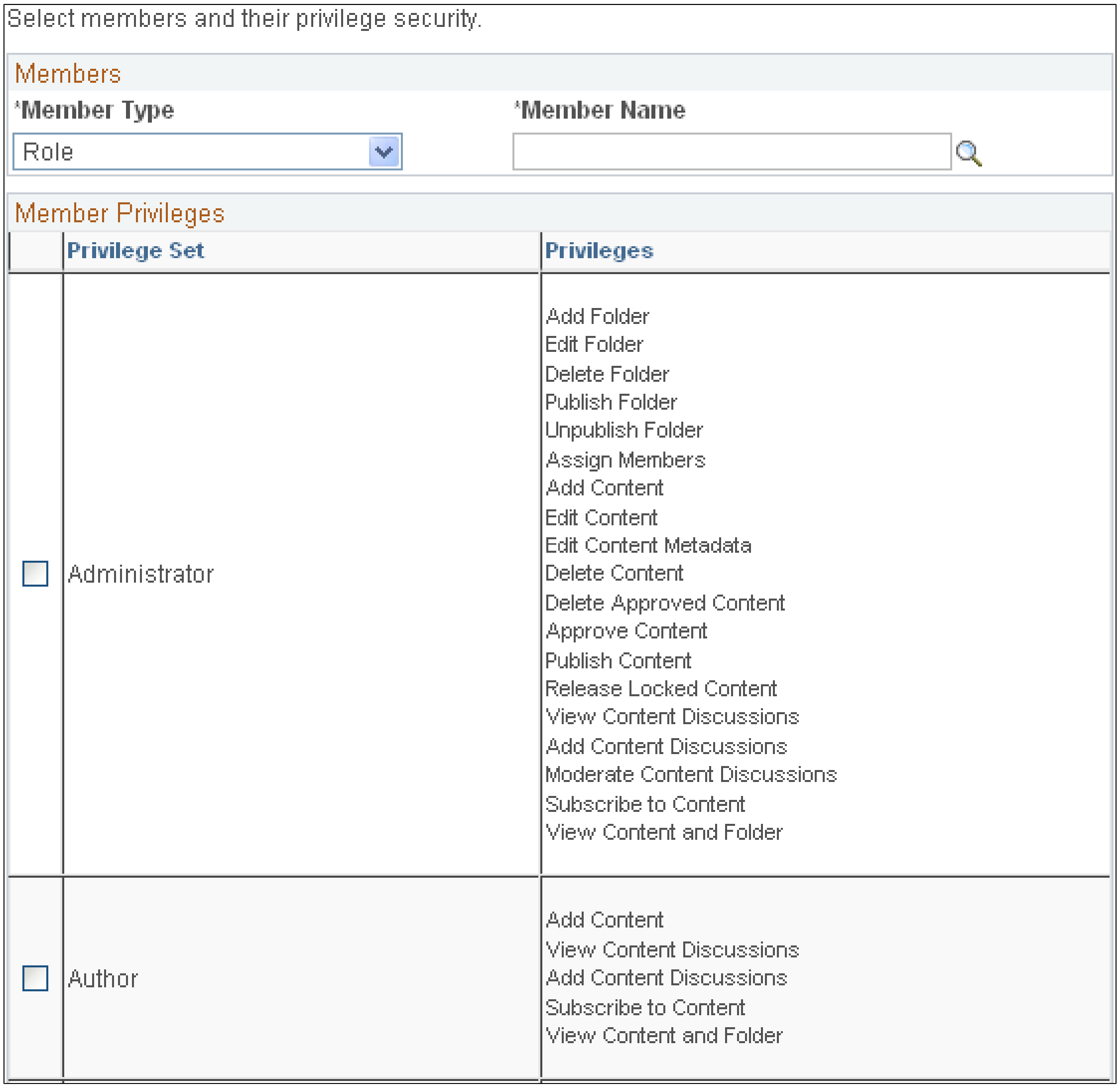
This example illustrates the fields and controls on the Folder Security - Set Members Privileges page, Managed Content component.



Use this page to assign privilege sets to the selected member.

Field or Control	***Description***
Member Type	Select either *Role* or *User* for member type.
Member Name	Enter or select the desired information.
Privilege Set	Select appropriate privileges for this member. Available options are **Administrator** and **Author.**
Privileges	Displays the privilege sets that were defined for the Manage Content feature.

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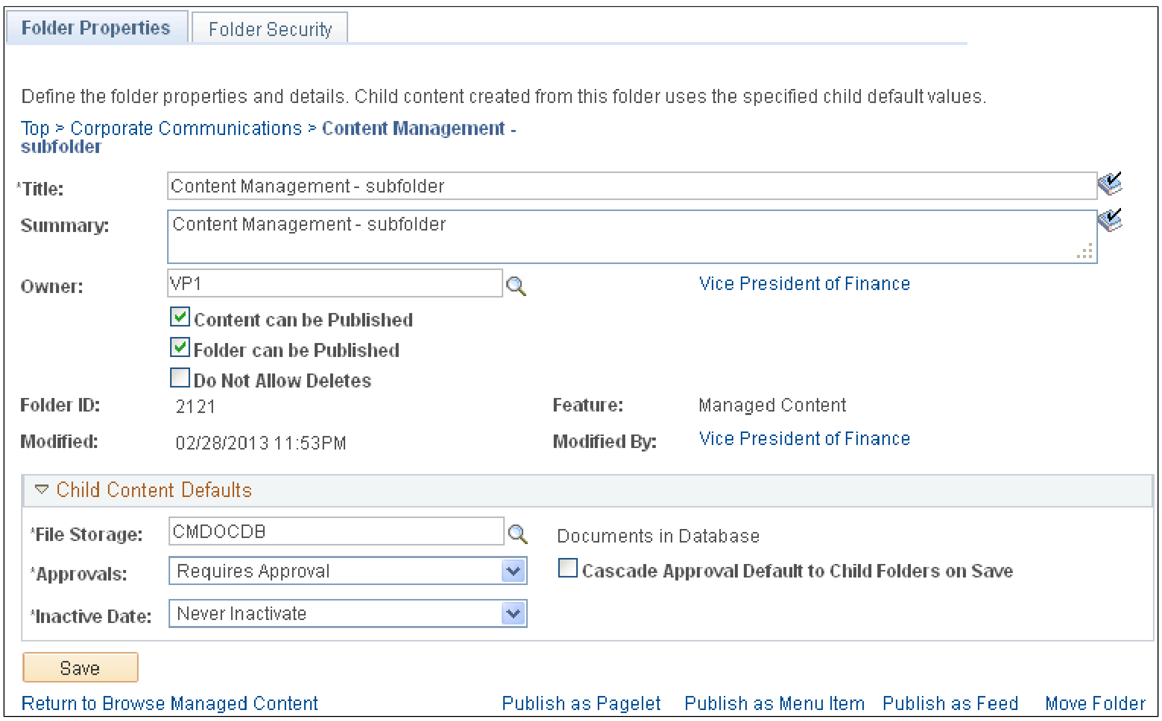
Field or Control	*Description*
OK	Click to accept changes to the privilege sets and return to the Folder Security page.

Folder Properties Page

Access the Folder Properties page (select **Content Management** > **Managed Content** > **Browse Folder;** click an entry in the **Title** column to select a top folder in which to add the subfolder; and click the **Add Folder** button).

This example illustrates the fields and controls on the Folder Properties page.



This page is used to set the properties for a new folder or to update property details for an existing folder.

Note: This Folder Properties page is used for top folders as well as for subfolders.

Users can add folders at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders.

The settings for the **Content can be Published, Folder can be Published,** and **Do Not Allow Deletes** options as well as for the options in the Child Content Defaults section have been inherited from the parent folder. The members and privileges defined for the parent folder have also been inherited and you cannot modify those privileges.

See Folder Properties Page.

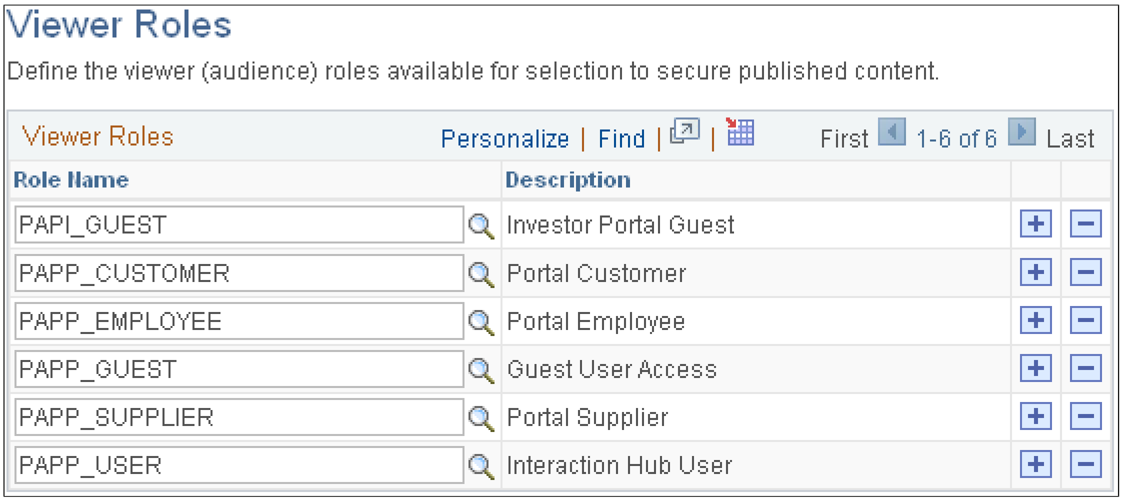
Viewer Roles Page

Use the Viewer Roles page (EO_PE_ROLE_TBL) to define the viewer (audience) roles to use to secure published content.

Navigation:

Content Management > **Administration** > **Viewer Roles**

This example illustrates the fields and controls on the Viewer Roles page. You can find definitions for the fields and controls later on this page.



Use this page to specify the roles that you want to make available to content publishers. Specifying viewer roles creates a short list from all of the PeopleTools security roles defined in the system. Only the roles that are specified on this page are available to publishers when they select roles to make up the authorized viewing audience for published content.

Field or Control	***Description***
Role Name	Use the search button to select a role name from PeopleTools security roles. Only the roles that are selected are available to users when they select roles that comprise the viewing audience of published content for news articles and promotions.
Description	Displays the description for each role.

See *PeopleTools: Security Administration*, "Setting Up Roles."

File Storage Page

Use the File Storage page (EPPCM_DEFAULT_URL) to define the storage location for file attachments in the Content Management system.

Navigation:

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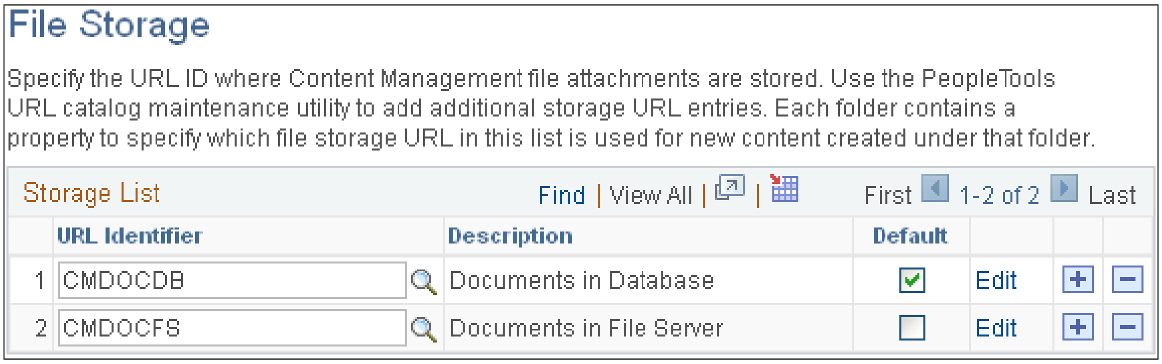
Content Management > **Administration** > **File Storage**

This example illustrates the fields and controls on the File Storage page. You can find definitions for the fields and controls later on this page.



Use this page to specify the locations where document file attachments can be stored for the content management features. When users add a new Managed Content folder or News Publication section, they can specify any location that is listed in this table as the storage location for all document files that are in that folder.

Field or Control	***Description***
URL Identifier	Use the search button to select the desired URL identifier from a list of available URLs. The system uses this ID when referring to document locations. The URL list is populated from the URL Maintenance page.
Description	Displays the description for each URL identifier.
Default	Select to define the location that you want to use as the default whenever a new folder or new publication section is created.
Edit	Click to access the URL Maintenance page to set up the URL address for this storage location.

Note: This page defines locations for document files only. Image files are stored in a specific location on the web server.

See Setting Up an FTP Service for Image Attachments.

Files can be stored on FTP servers or in the Interaction hub database as BLOBs. Two locations are predefined, one for each type. However, the FTP server definition is not complete; it is just a placeholder. You must edit the actual FTP URL address for your server, or delete it and add multiple new URL ID choices, as needed, with the actual server and directory addresses. You can specify as many file server locations as necessary. Use the PeopleTools URL maintenance utility to define these URL identifiers:

- *CMDOCFS - File server location:* An FTP service must be running for the PeopleTools file attachment functions to work properly.

- *CMDOCDB - Database Location* (BLOB): The record PS_EPPCM_DOCINDB is delivered with the PeopleSoft Interaction hub database for this purpose.

  You can also create additional database records to store attachments by using the same structure that is defined in PS_EPPCM_DOCINDB. Assign them to the desired tablespace.

Note: You should discuss these options with the database and system administrators and consider the advantages and disadvantages of each. Physical storage requirements, backup procedures, virus scanning, and access rights should all be considered. You can implement Content Management by using one or both options.

Security for File Attachments

Security within content management is enforced through the member and privilege set concept. Document content is accessible by members of all folder locations where the content resides.

See the "Securing Your PeopleSoft System in a Web Environment" red paper on the My Oracle Support website.

Using Document File Storage Locations

A folder administrator selects document file storage locations when he or she creates new Managed Content folders, News Publication sections, or Categorized Content taxonomy folders.

See Understanding Managed Content, Understanding Categorized Content, Understanding News Publications.

Each time that a new version of a document file is attached, the Content Management feature stores the document location's URL identifier of the current Managed Content folder. Upon later retrieval, the system dynamically creates a fully qualified URL address by appending the information that is stored in the ATTACHSYSFILENAME field to the underlying URL address that is associated with the URL identifier.

The following table lists the fields that the system uses to store this data:

EPPCM_DOC Record Field Names	***Usage***
URL_ID	The URL identifier description from the PeopleTools URL table. Underlying the identifier is the full URL address of the server and directory location where the file is stored. For example, CMDOCFS is the URL identifier for the defined URL address: *ftp://userID:password@fileserver/directory.*
ATTACHSYSFILENAME	The unique file name that is assigned by the system each time a new version of the document is saved. It is composed of the content ID, a version ID, and the name of the file itself, for example, 10403ROI.pdf.
ATTACHUSERFILE	The original name of the uploaded file, for example, ROI.pdf.

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EPPCM_DOC Record Field Names	***Usage***
URL	This field is not used.

If the administrator exchanges the document location for a Managed Content folder, the folder content might be spread across multiple physical locations. Changing a file server location does not change the URL_ID references for previously created document file versions, and everything should still work correctly. However, if the underlying URL address for an identifier is changed, you can no longer access previously stored content unless it is physically moved to the new location.

Note: Content can be shared between multiple Managed Content folders. If the content is checked out and revised from multiple folders, the various versions of one content entry might be located in different physical locations if each Managed Content folder is assigned a different document location. The URL ID is based on the document location that is assigned to the current folder at the time of attachment.

Important! If you are in a DB2 OS/390 and z/OS environment, restrictions are placed on file attachment sizes. You are limited to chunk sizes of 3862 for a 4K tablespace or 32444 for a 32K tablespace.

See *PeopleTools: PeopleCode Developer's Guide*, “Working With File Attachments,” Developing Applications that Use File Attachment Functions, File Attachment Chunk Size.

URL Maintenance Page

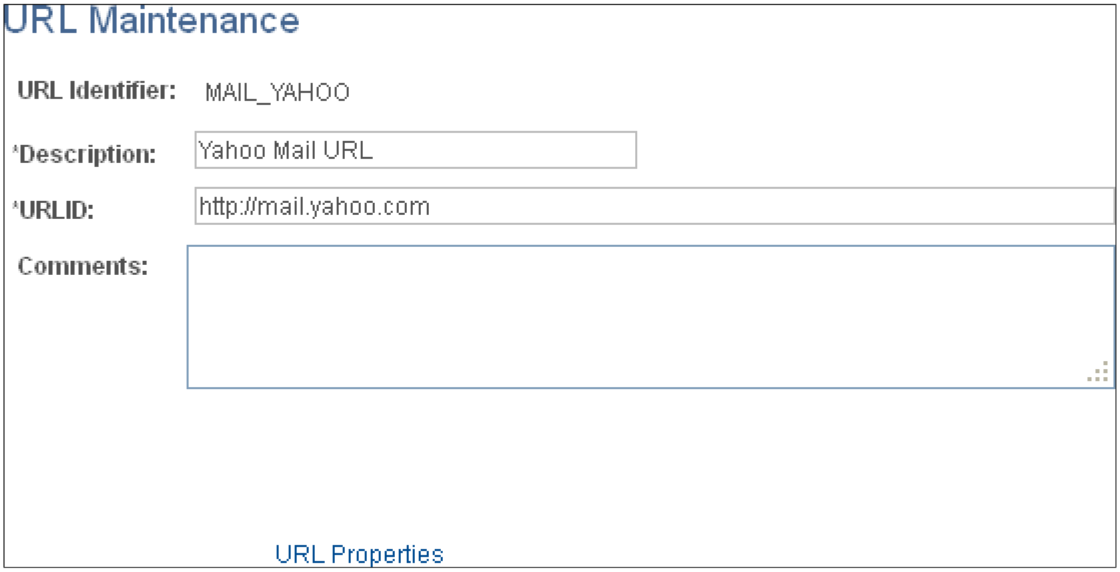
Use the URL Maintenance page (URL_TABLE) to set up the FTP URL addresses or record names of the document repositories.

Navigation:

Content Management > **Administration** > **File Storage**

Click the **Edit** link that is associated with the desired URL ID on the File Storage page.

This example illustrates the fields and controls on the URL Maintenance page. You can find definitions for the fields and controls later on this page.



The system administrator is responsible for setting up actual URL addresses for document storage. This must be completed before you use the Content Management Attachment Locations page.

Field or Control	***Description***
URL Identifier	Name that uniquely identifies the URL that is entered on the search page. This name appears later as the selection on the Content Management's Define File Storage page. See File Storage Page.
Description	Enter a meaningful description for this URL identifier. This value appears on the File Storage page.
URL	Enter the location of the document repository. The required formats are: • FTP File server: `ftp://fileserver/path`. **Note:** Enter user and encrypted password in the URL properties. • BLOB in database: `record://recordname`.
Comments	Add any additional comments about this URL identifier.

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Field or Control	Description
URL Properties	Click to access the URL Properties page, where you can specify or update URLs. URLs that are saved here can be referenced from page controls such as a button or link. The associated URL can be either an internet or intranet link. See *PeopleTools: Systems and Server Administration*, “Using PeopleTools Utilities,” Using Administration Utilities, URL Maintenance.

Setting Up an FTP Service for Image Attachments

Images are not attached to the storage location that is specified by the Managed Content folder. Images are always attached to the FTP server that is set up in the PeopleTools URL table with the EPPCM_IMAGE identifier. You need to verify that the identifier is updated with your specific environment information. To render image files as actual images, the FTP service must exist in a web server directory in the PeopleSoft domain.

To set up the FTP service in a web server directory in the PeopleSoft domain, you must complete the following tasks:

- Extend the web server directory to include the folder path *ps/images/portal_pa/.*
- Create an FTP service on the web server machine with an absolute path to the extended folder path of the web server directory.
- Set the FTP path in the EPPCM_IMAGE URL identifier definition to point to the created FTP service.
- Update the **Image Attachment URL Path** field on the Portal Solutions Installation Options page to contain the web server’s relative or absolute URL of the extended path that will contain the image files from the FTP server.

  See “Defining Installation Options” (Portal and Site Administration).

This setup is fully documented in the *PeopleSoft Interaction hub 9.1 Installation Guide,* which is available on My Oracle Support.

Note: If you are using DB2, size limitations exist for images to be saved to the database based on the database platform.

See the product documentation for *PeopleSoft Portal Solutions 9.1 Revision 2 Installation Guide*.

Administering Content Management Business Attribute Security

This section provides an overview of content management business attribute security and discusses how to enable content management business attribute security.

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Related Links

Content Data Attributes Page

"Understanding Business Attribute Usage" (Portal and Site Administration)

Understanding Content Management Business Attribute Security

Beginning with Oracle's PeopleSoft Interaction Hub release 9.1, Feature Pack 1, in addition to folder-level security, you can optionally use business attributes to control who has access to managed content items. These business attributes can include categories such as department, job code, location, and so on. Using these attributes enables you to target content to a specific subset of users, based on the business attributes assigned to that content and the specific attribute value associated with each user. For example, if a business attribute for department is established, when you create managed content, you can designate which department that content item is associated with, and then only portal users associated with that department would be permitted to access that item. This additional security impacts managed content in these areas:

- Content pagelets.
- Search results.
- Feeds.
- Discussion forums.
- Calendar events.
- Action items.

Note: Any folder security that exists for managed content is applied before any business attribute controls.

When business attribute security is active, an additional link, **Business Data Attributes**, appears on the lower part of the Maintain Content page, as shown in this example.

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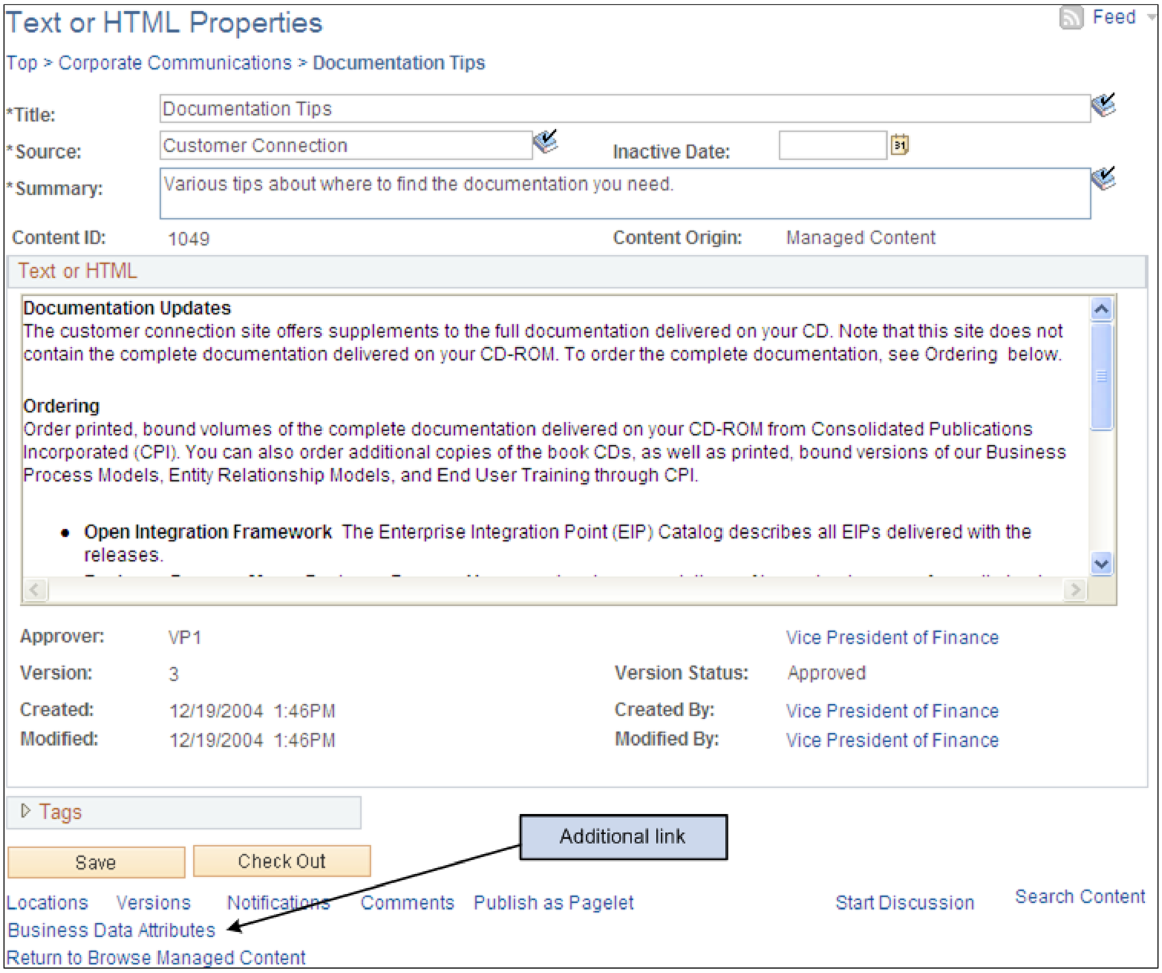
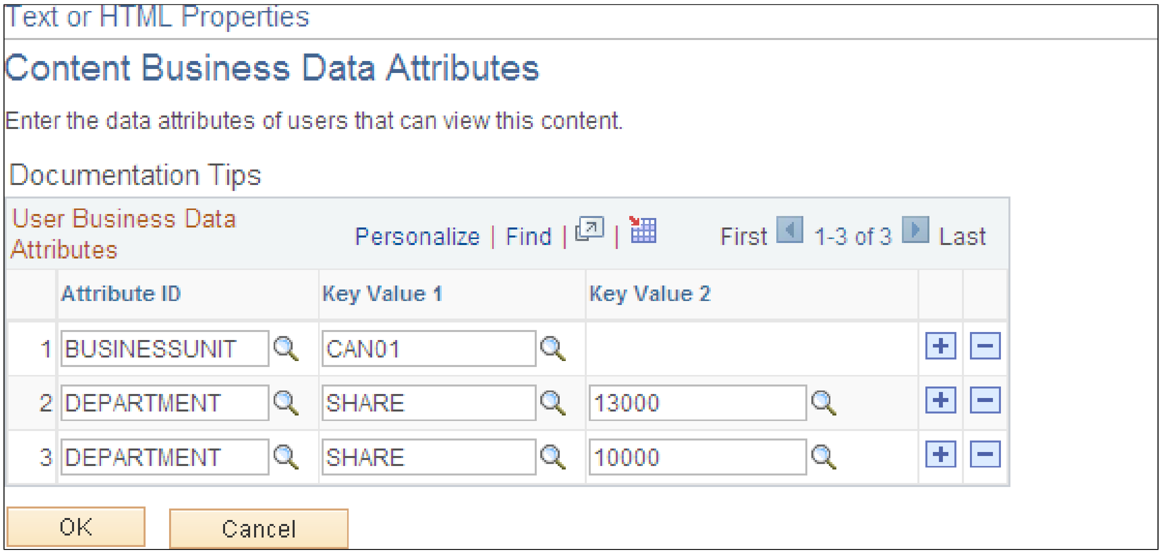
This example illustrates the additional link when business attribute security is active.



This link enables users to optionally select business attributes to associate with that piece of managed content. While the link implies you can use only attributes from human resource systems, attributes can be used from any source system, if properly configured. This example shows the window that appears when you click this link; in this case data attributes for business unit and department have been specified.

This example illustrates the fields and controls on the Content Business Data Attributes page.



You can assign multiple business attributes to content. Values using the same attribute are grouped using the OR operator. Values from different attributes are grouped using the AND operator. For example:

- Suppose Company is defined as an attribute that is used to manage access to content. If both Company A and Company B are assigned to a piece of content, then users from either Company A or Company B can access that content.
- Suppose both Business Unit and Department are defined as attributes to manage access to content. If business unit US001 and department 1000 are assigned to a piece of content, then only users assigned to business unit US001 and department 1000 can access that content.

Determining Which Business Attributes Apply to Content Management

Portal administrators configure the business attributes that are available for use with managed content. Work with your portal administrator to determine which attributes are available to use. The attributes you can use depend on the data available in the source system. Typical attributes from PeopleSoft HCM, for example, would be department, job code, and so on. New attributes can be configured as needed.

See “Maintaining Business Attribute Definitions” (Portal and Site Administration).

Enabling Content Management Business Attribute Security

The ability to use business attributes to secure access to managed content is a system-wide option that is set by portal administrators on the Installation Options-Features page. As delivered, the feature is enabled by default.

See “Features Page” (Portal and Site Administration).

Purging and Inactivating Content

This section discusses ways to purge and inactivate content and also to preview items selected from the Purge/Inactive page.

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Pages Used to Purge and Inactivate Content

Page Name	***Definition Name***	***Usage***
Purge/Inactivate Page	EPPCM_PRG_RUN	Purge content or folders, inactivate content, unpublish content, or delete versions from the Content Management system.
Purge/Inactivate - Preview Selection Page	EPPCM_PRG_VIEW	Preview items to be purged or inactivated.
Process Scheduler Request	PRCSRQSTDLG	Specify process variables.

Understanding Purging and Inactivating Content

You use the Purge/Inactivate page to set parameters for the Purge/Inactivate process, an Application Engine program. You can set up the Purge/Inactivate process to perform one of several actions depending on the selected feature within the content management system:

- *Delete Past Versions* deletes the noncurrent versions of a piece of content.

  Only the last approved version and any successive versions of the content are retained.

- *Purge Items* deletes content, folders, or both from the system.

  This action excludes folders that do not allow deletes and content in folders that do not allow deletes.

- *Set Inactive Date* updates the inactive date for the selected content.
- *Unpublish Content* changes the content's status from published to pending (or blank).

Only items that meet all of the selection criteria are processed.

Note: Use care in selecting and processing items from this page. Content or folders that are purged from the system cannot be retrieved.

Purge/Inactivate Page

Use the Purge/Inactivate page (EPPCM_PRG_RUN) to purge content or folders, inactivate content, unpublish content, or delete versions from the Content Management system.

Navigation:

Content Management > **Administration** > **Purge/Inactivate**

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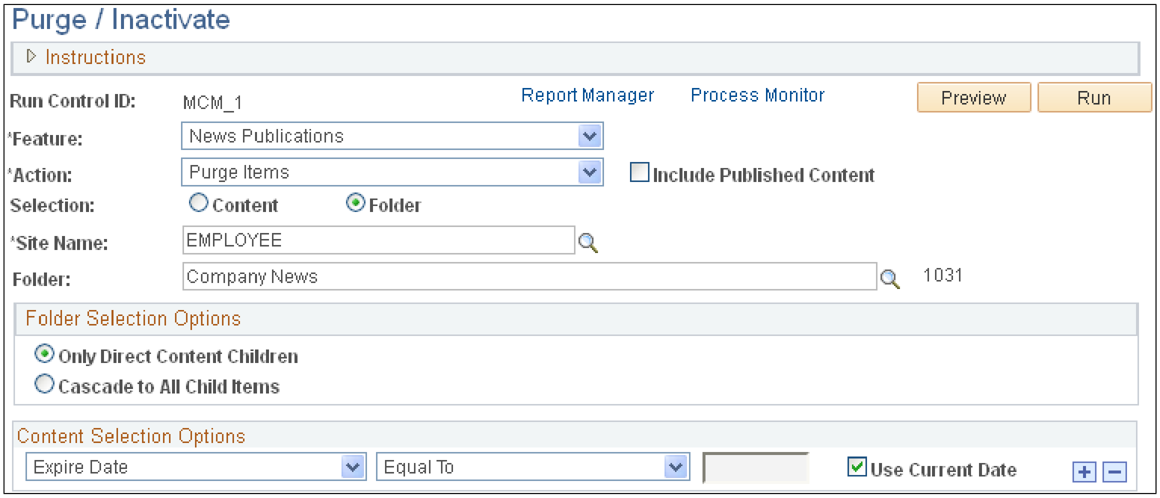
This example illustrates the fields and controls on the Purge/Inactivate page. You can find definitions for the fields and controls later on this page.



Options available to use on this page are based on the feature definition. For example, with Managed Content, if you select to purge content, the system purges only unpublished content. If you select to delete past versions, the system deletes versions prior to the last approved one.

Warning! Use care in selecting and processing items from this page. Content or folders that are purged from the system cannot be retrieved.

Field or Control	***Description***
Run Control ID	Displays the run control ID for the purge/inactive process.
Report Manager	Click to access the Report Manager module to view report results.
Process Monitor	Click to access the Process Monitor to view the status of job requests.
Preview	Click to view the pieces of content, folders, published menu items, and pagelet definitions that have been selected and what action will be performed on them on the Purge/Inactive - Preview Selection page. See Purge/Inactivate - Preview Selection Page.
Run	Click to access the Process Request page, where you can start the Application Engine process to purge or inactivate content or folders. See *PeopleTools: System and Server Administration*, “Submitting and Scheduling Process Requests.”

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Field or Control	***Description***
Feature	Select a feature from the drop-down list box to perform. The available features are: • *Categorized Content* • *Collaborative Workspaces* • *Managed Content* • *News Publications*
Action	These are the available actions: • *Delete Past Versions* deletes unused versions. Only the last approved version and any successive versions are retained. This option is available only for features that enable content versions and excludes the following items: content without an approved version, content without any versions prior to the last approved version, and content that did not originate in the selected feature. Folders are not included in this action. • *Set Inactive Date* updates the selected content to the date specified in the *Inactive Date* field. A blank **Inactive Date** field clears the inactive date of the selected content. The Set Inactive Date action excludes content that did not originate in the selected feature. • *Purge Items* deletes the content, folders, or both from the system. The Purge Items action excludes: • Folders that do not allow deletes. • Content in folders that do not allow deletes, including: Any published content (and the parent folder path) when the **Include Published Content** option is not selected or is not available for the feature. Folders listed in a feature definition as a one-top folder or as a share folder. All folders when the **Folder Cascade** option is set to *Only Content.* • *Unpublish Content* changes the publish status of the content location from *published* to *pending* (or blank). The Unpublish Content action is available only for features that publish within the Content Management system.

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Field or Control	***Description***
Include Published Content	This field appears if the **Action** field is set to *Purge Items.* Select this option to include published content in the action.
Inactive Date	This field appears if the **Action** field is set to *Inactive Date.* Select a date to use as the date that the content is considered inactive. Leaving this field blank creates a blank inactive date for the content.
Selection	Select whether the specified action should be performed on **Content** or on a **Folder.** When you select the **Folder** option, this selection becomes your starting folder.
Site Name	This field appears if the **Folder** option is selected. Select the name of the site if you select to purge folders.
Folder	This field appears if the **Folder** option is selected. Select the folder name and ID if you are purging folders.
Folder Selection Options	Select the **Only Direct Content Children** option if the content is published in more than one location. This action is performed only on the children content directly under the folder. Select the **Cascade to All Child Items** option to perform action on child folder and child content.
Folder Cascade Options	This section appears if the **Cascade to All Child Items** option is selected. The available options are: • *Only Content* In the folder that you have selected, only the content is acted upon and not the folders. • *Folders and Content* Enables you to select the folders and the content. • *Purge Selected Folder* Select to purge the folder.

Content Selection Options

The Content Selection Options section includes these options:

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- *Content ID* enables you to select a comparison operator and a content ID.
- *Created by User ID* enables you to select a comparison operator and a user ID.
- *Expire Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Inactive Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Last Updated Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Last Updated by User ID* enables you to select a comparison operator and a user ID.

Purge/Inactivate - Preview Selection Page

Use the Purge/Inactivate - Preview Selection page (EPPCM_PRG_VIEW) to preview items to be purged or inactivated.

Navigation:

Content Management > **Administration** > **Purge/Inactivate**

On the Purge/Inactivate page, click the **Preview** button.

This example illustrates the fields and controls on the Purge/Inactivate - Preview Selection page: Content Location tab.

The Purge/Inactivate - Preview Selection page: Content Location tab enables you to preview the list of items that will be affected by the Purge/Inactivate process. If you select a folder to purge, and the folder is published as a pagelet or a menu item, the folder and all its content is purged.

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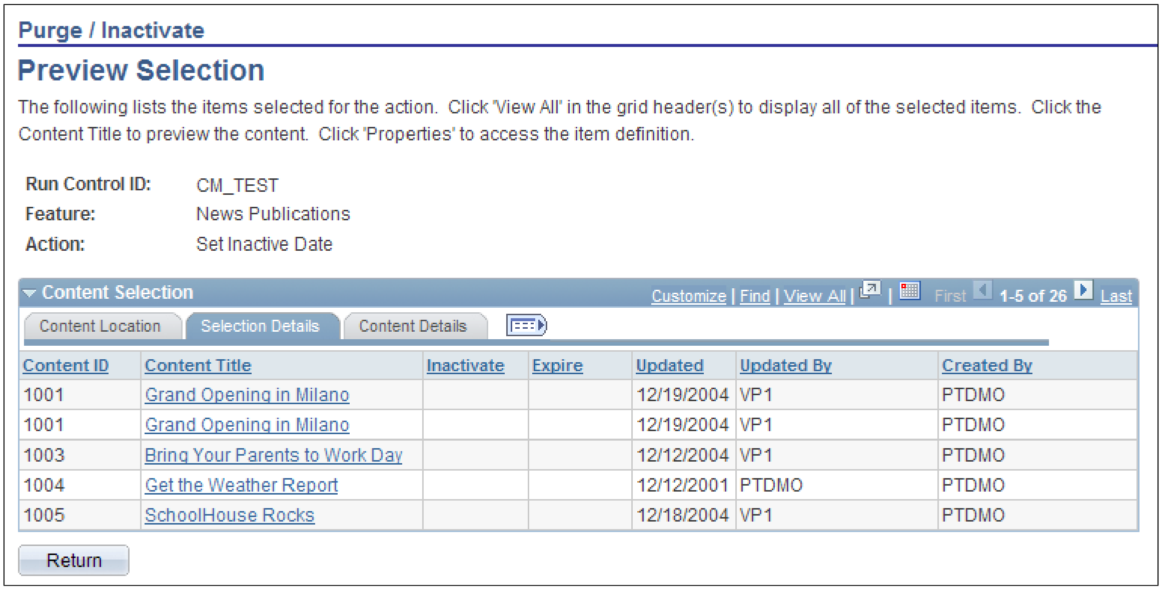
Selection Details Tab

Access the Purge/Inactivate - Preview Selection page: Selection Details tab (select **Content Management** > **Administration** > **Purge/Inactivate**; click the **Preview** button, and select the Selection Details tab).

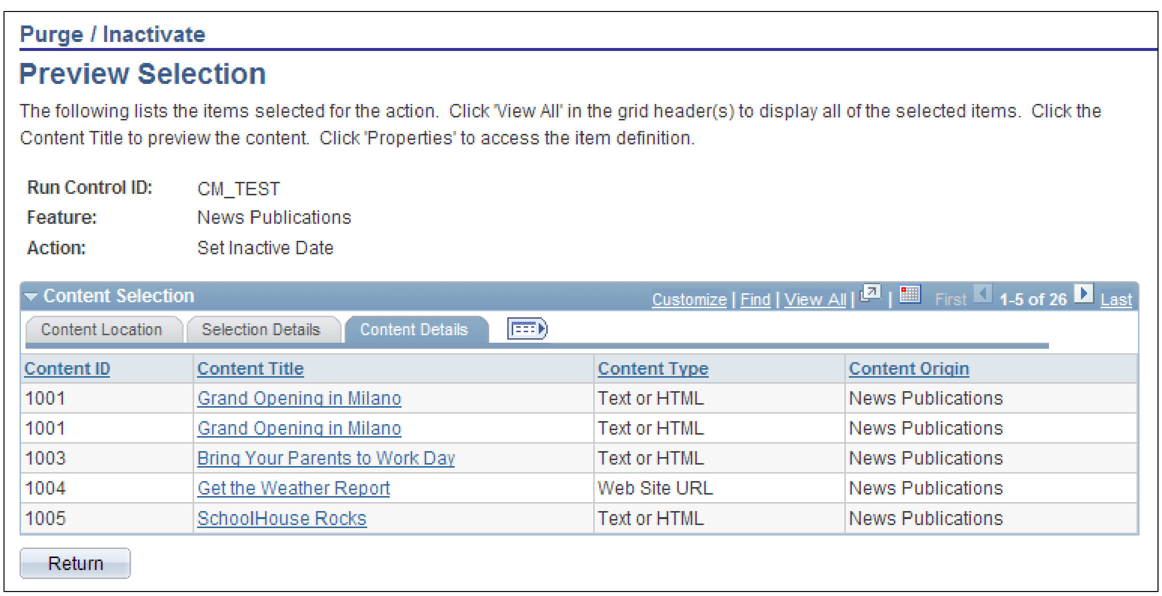
This example illustrates the fields and controls on the Purge/Inactivate - Preview Selection page: Selection Details tab.



Content Details Tab

Access the Purge/Inactivate - Preview Selection page: Content Details tab (select **Content Management** > **Administration** > **Purge/Inactivate**; click the **Preview** button, and select the Content Details subtab).

This example illustrates the fields and controls on the Purge/Inactivate - Preview Selection page: Content Details tab.



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When you select the **Versions** option on the Content Versions page, the Content Details tab shows the different content versions being acted upon.

Content Versions Page

Use the Content Versions page (EPPCM_CONT_VER) to review, delete, or check out different versions for a specific content item.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click the **Properties** link on the Browse Managed Content or My Managed Content page.

Click the **Versions** link on the Content Properties page.

The Content Versions page lists each version of the content and gives you the status of the action that will occur to each version of the content. The system retains the Max Approved version, which is also the last updated date, and any version thereafter. The system deletes any version before the Max Approved version.

See Managing Versions.

Defining Features

This section discusses setting feature definitions, setting component options and defining content types.

Pages Used to Define Features

Page Name	***Definition Name***	***Usage***
Feature Definitions Page	EPPCM_CATG_TYPE	Configure content management features.
Component Types Page	EPPCM_COMP_TYPE	Control the page display and link destinations between content management components.
Content Types Page	EPPCM_CONT_TYPE	Control the content types that are available when you add content from components.

Feature Definitions Page

Use the Feature Definitions page (EPPCM_CATG_TYPE) to configure content management features.

Navigation:

Content Management > **Administration** > **Feature Definitions**

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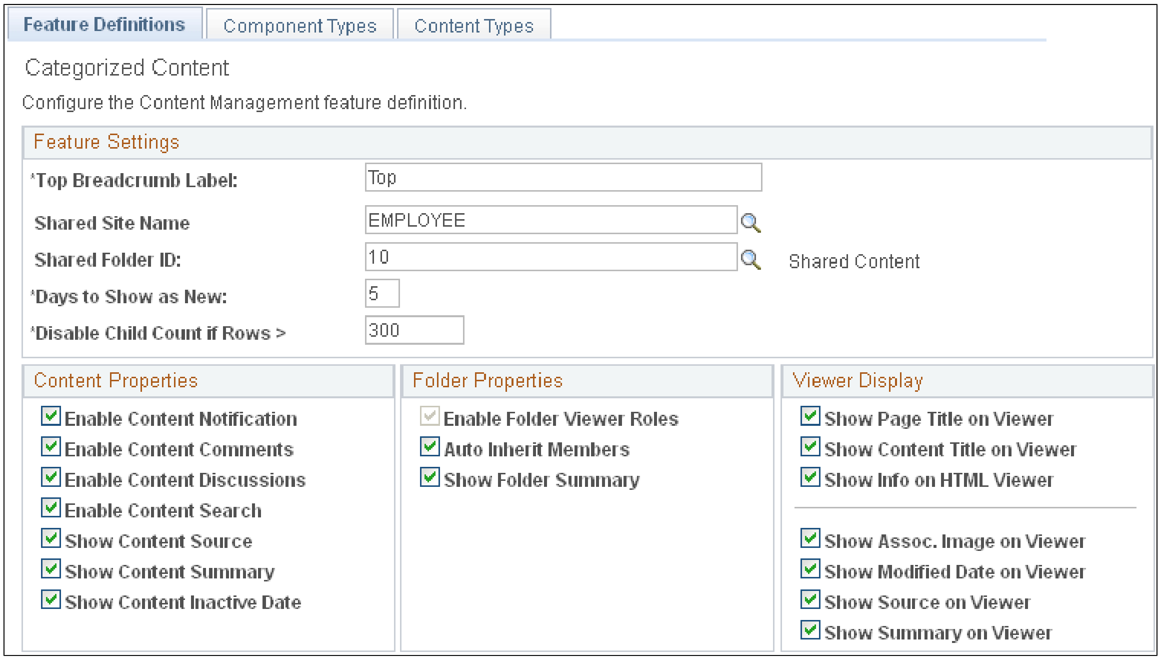
This example illustrates the fields and controls on the Feature Definitions page. You can find definitions for the fields and controls later on this page.



Note: The options that appear on this page depend on the feature that you selected on the search page.

Feature Settings

Field or Control	***Description***
Top Breadcrumb Label	Lists the breadcrumb label to use to access the list of accessible top folders.
Top Folder ID	The ID of the top folder type.
Shared Site Name	Select a site name from the prompt. This is used as the default value to store shared content.
Shared Folder ID	Used as the default value (the selected folder cannot be deleted). This is prompted from the Managed Content Folder, where content can be published.
Days to Show as New	Specify how many days the star icon will appear indicating that the content item has been recently added for the hierarchy or news display.

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Field or Control	*Description*
Disable Child Count if Rows >	Enter a limit for hierarchy page row processing. Limits count display and location path on user pages.

Content Properties

Options selected in the **Content Properties** group box enable these functions in the respective Content Management features. These options include whether a field is available for display or editing; or whether a subfeature such as notifications are enabled within a Content Management feature.

Note: If an option is not available for selection, then that option is not enabled at the system level for that Content Management feature.

Field or Control	*Description*
Enable Content Notification	Select to show the **Notify** link on content properties to access interested parties and ad hoc notifications.
Enable Content Comments	Select to show the **Comments** link on content properties.
Enable Content Discussions	Select to enable creation or viewing of discussions based on the current content item.
Enable Content Search	Select to show the **Search** link on content properties and in the hierarchy.
Show Content Source	Controls the display of the content source on content properties. This option can be edited on all features with enabled Content Management.
Show Content Summary	Controls the display of content summary on content properties. This option can be edited on all features with enabled Content Management. **Note:** Content summary is required with News Publication pagelets, for use in top stories. Therefore, this option cannot be edited for News Publication pagelets.

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Field or Control	*Description*
Show Content Inactive Date	Controls the display of the inactive date on content properties. This option can be edited on all features with enabled Content Management.

Folder Properties

Options selected in the Folder Properties group box enable these functions in the respective Content Management features.

Field or Control	*Description*
Enable Folder Viewer Roles	Select to enable adding folder viewer roles in Categorized Content. This option sets viewer security in the Hierarchy Viewer pages (from published folders) to use the folder viewer roles instead of the viewer privilege. The Categorized Content requires viewer roles for the Browse by Category feature. **Note:** When publishing content with security roles, the system publishes based on your defined viewer roles rather than member privileges if this option is selected.
Auto Inherit Members	When a child folder is created, the system automatically inserts parent members and privileges.
Show Folder Summary	Controls the display of the summary on folder properties and hierarchy management. This option can be edited on all features with enabled Content Management.

Viewer Display

Content created or stored in PeopleSoft Content Management can be viewed from a variety of feature areas in the PeopleSoft Interaction hub. For example, you can view content when selecting an article in the News Publication feature, when clicking a search results content link, or when selecting preview in any of the Content Management features.

The content is rendered in a viewer page. The viewer pages can be configured to show or hide the source, modified date, or an associated image based upon the feature type settings. Because HTML content often comes with its own images and summary, an additional flag also exists to show or hide content information for HTML type content. This flag setting overrides the settings for the source, modified dates, summary, and images when the content is HTML. This setting also enables the administrator to show the summary, source, image, or modified date on file or URL content, but hide it on HTML content.

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Field or Control	*Description*
Show Page Title on Viewer	Select to display the page title on render content (viewer or preview modes).
Show Content Title on Viewer	Select to display the content title on render content (viewer or preview modes).
Show Info on HTML Viewer	Select to display the source, modified dates, image, and summary on HTML content on render content (viewer or preview modes). This setting overrides other settings for the viewer when it is HTML-type content.
Show Assoc. Image on Viewer (show associate image on viewer mode)	Select to display associated images on render content (viewer or preview modes).
Show Modified Date on Viewer	Select to display the modified date on render content (viewer or preview modes). Also affects the hierarchy viewer grid from published Content Management folders.
Show Source on Viewer	Select to display the source on render content (viewer or preview modes). Also affects the hierarchy viewer grid from published Content Management folders.
Show Summary on Viewer	Select to display the summary on render content (viewer or preview modes). Also affects the hierarchy viewer grid from published Content Management folders.

Component Types Page

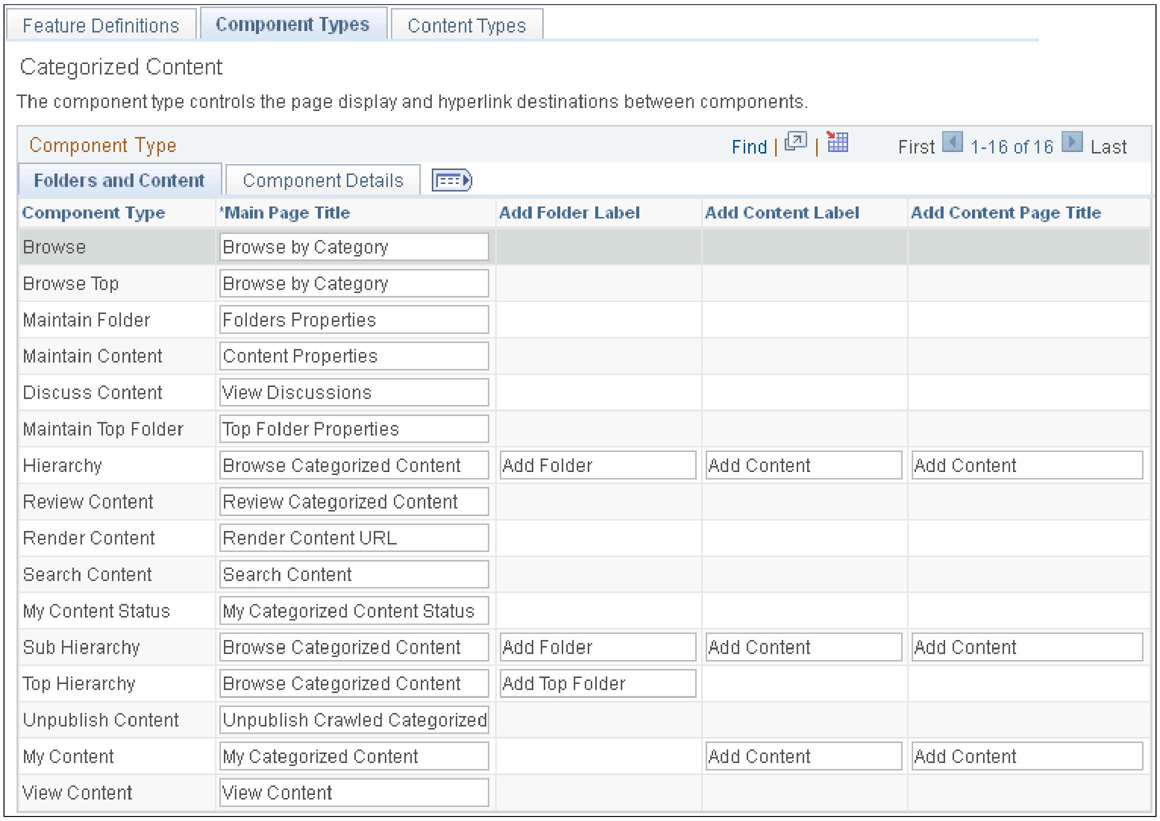
Use the Component Types page (EPPCM_COMP_TYPE) to control the page display and link destinations between content management components.

Navigation:

Content Management > **Administration** > **Feature Definitions**

Select the Component Types tab.

This example illustrates the fields and controls on the Component Types page: Folders and Content tab.



Component Type	*Main Page Title	Add Folder Label	Add Content Label	Add Content Page Title
Browse	Browse by Category			
Browse Top	Browse by Category			
Maintain Folder	Folders Properties			
Maintain Content	Content Properties			
Discuss Content	View Discussions			
Maintain Top Folder	Top Folder Properties			
Hierarchy	Browse Categorized Content	Add Folder	Add Content	Add Content
Review Content	Review Categorized Content			
Render Content	Render Content URL			
Search Content	Search Content			
My Content Status	My Categorized Content Status			
Sub Hierarchy	Browse Categorized Content	Add Folder	Add Content	Add Content
Top Hierarchy	Browse Categorized Content	Add Top Folder		
Unpublish Content	Unpublish Crawled Categorized			
My Content	My Categorized Content		Add Content	Add Content
View Content	View Content			

The Component Types page: Folders and Content tab controls the page title and the button labels on the components.

Viewing Component Details

Access the Component Types page: Component Details tab (select **Content Management** > **Administration** > **Feature Definitions;** select the Component Types tab; then select the Component Details subtab).

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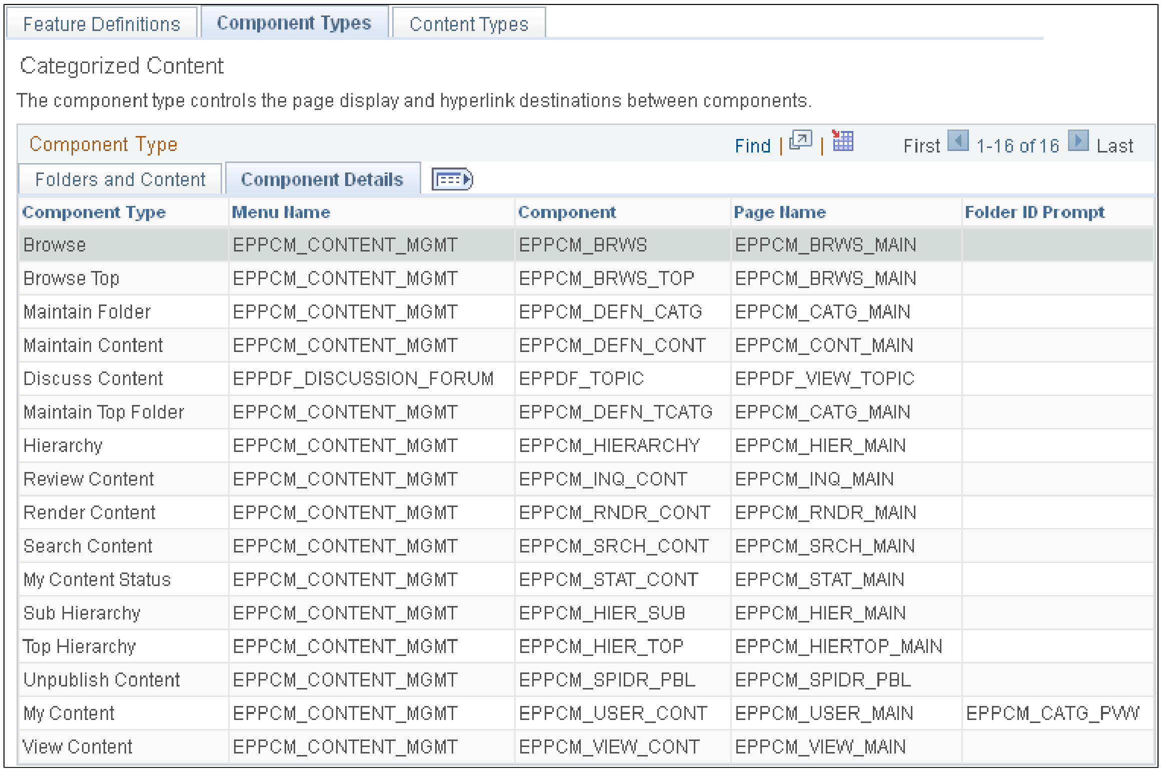
This example illustrates the fields and controls on the Component Types page: Component Details tab.



Component Type	Menu Name	Component	Page Name	Folder ID Prompt
Browse	EPPCM_CONTENT_MGMT	EPPCM_BRWS	EPPCM_BRWS_MAIN	
Browse Top	EPPCM_CONTENT_MGMT	EPPCM_BRWS_TOP	EPPCM_BRWS_MAIN	
Maintain Folder	EPPCM_CONTENT_MGMT	EPPCM_DEFN_CATG	EPPCM_CATG_MAIN	
Maintain Content	EPPCM_CONTENT_MGMT	EPPCM_DEFN_CONT	EPPCM_CONT_MAIN	
Discuss Content	EPPDF_DISCUSSION_FORUM	EPPDF_TOPIC	EPPDF_VIEW_TOPIC	
Maintain Top Folder	EPPCM_CONTENT_MGMT	EPPCM_DEFN_TCATG	EPPCM_CATG_MAIN	
Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIERARCHY	EPPCM_HIER_MAIN	
Review Content	EPPCM_CONTENT_MGMT	EPPCM_INQ_CONT	EPPCM_INQ_MAIN	
Render Content	EPPCM_CONTENT_MGMT	EPPCM_RNDR_CONT	EPPCM_RNDR_MAIN	
Search Content	EPPCM_CONTENT_MGMT	EPPCM_SRCH_CONT	EPPCM_SRCH_MAIN	
My Content Status	EPPCM_CONTENT_MGMT	EPPCM_STAT_CONT	EPPCM_STAT_MAIN	
Sub Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIER_SUB	EPPCM_HIER_MAIN	
Top Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIER_TOP	EPPCM_HIERTOP_MAIN	
Unpublish Content	EPPCM_CONTENT_MGMT	EPPCM_SPIDR_PBL	EPPCM_SPIDR_PBL	
My Content	EPPCM_CONTENT_MGMT	EPPCM_USER_CONT	EPPCM_USER_MAIN	EPPCM_CATG_PVW
View Content	EPPCM_CONTENT_MGMT	EPPCM_VIEW_CONT	EPPCM_VIEW_MAIN	

The Component Types page: Component Details tab controls the link destinations between components.

Content Types Page

Use the Content Types page (EPPCM_CONT_TYPE) to control the content types that are available when you add content from components.

Navigation:

Content Management > **Administration** > **Feature Definitions**

Select the Content Types tab.

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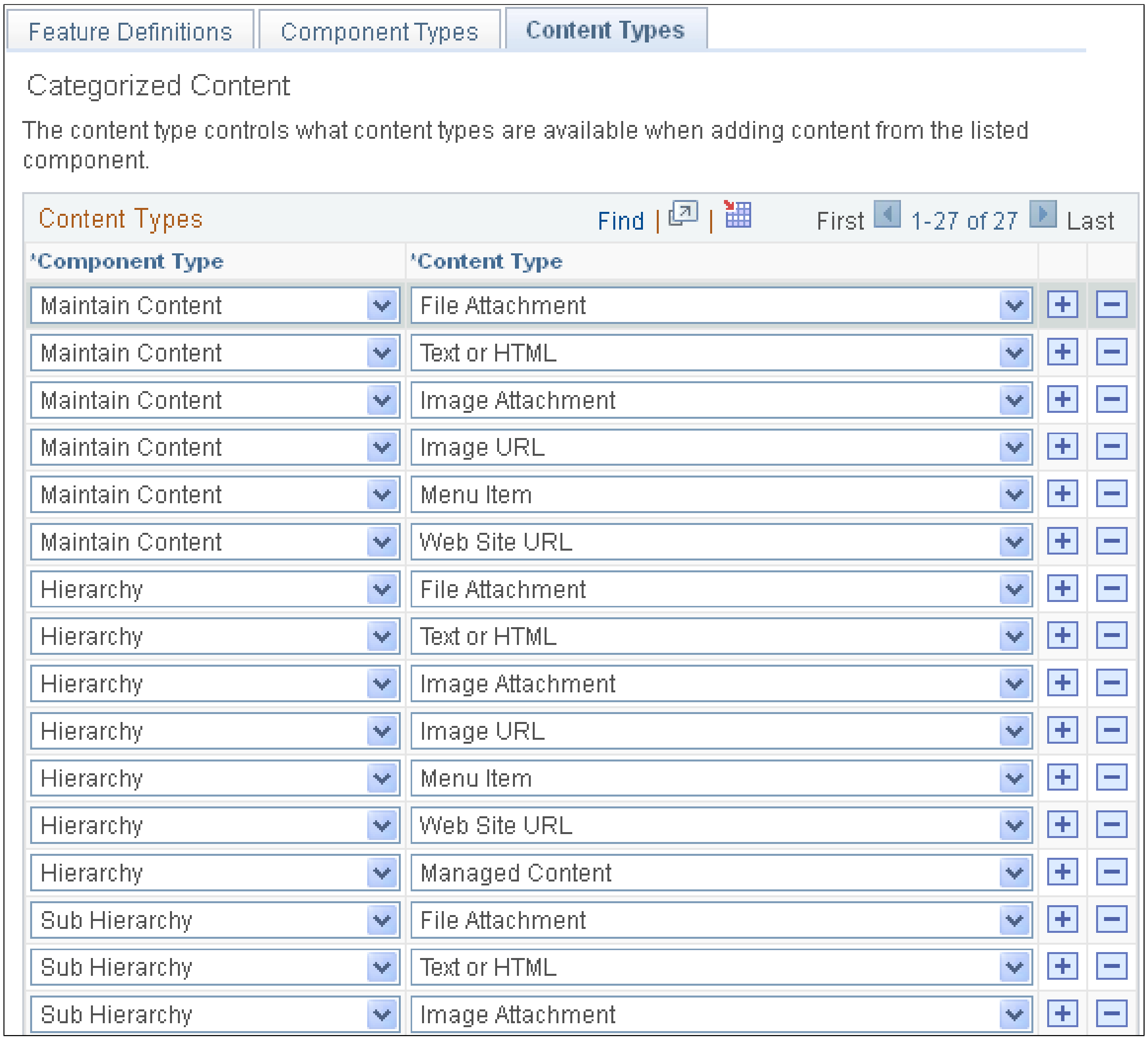
This example illustrates the fields and controls on the Content Types page.


Feature Definitions | Component Types | Content Types

Categorized Content

The content type controls what content types are available when adding content from the listed component.

Content Types   Find | | First 1-27 of 27 Last

*Component Type	*Content Type
Maintain Content	File Attachment
Maintain Content	Text or HTML
Maintain Content	Image Attachment
Maintain Content	Image URL
Maintain Content	Menu Item
Maintain Content	Web Site URL
Hierarchy	File Attachment
Hierarchy	Text or HTML
Hierarchy	Image Attachment
Hierarchy	Image URL
Hierarchy	Menu Item
Hierarchy	Web Site URL
Hierarchy	Managed Content
Sub Hierarchy	File Attachment
Sub Hierarchy	Text or HTML
Sub Hierarchy	Image Attachment

The Content Types page controls what content types are available when you add content from the listed component type.

Migrating Content

This section discusses setting up content migration, migrating content, previewing content migration, approving and reviewing content migration results.

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Pages Used to Migrate Content

Page Name	Definition Name	Navigation	Usage
Migrate Content Page	EPPCM_MIG_RUN	**Content Management** > **Administration** > **Migrate Content**	Migrate content data being developed in a staging database before it is required on the production database.
Content Migration - Preview Selection Page	EPPCM_MIG_PVIEW	**Content Management** > **Administration** > **Migrate Content** Click the **Preview** button on the Migrate Content page.	Preview your selections before the content is migrated and determine whether the content can be migrated. Also define actions for each content ID when migrating.
Content Migration - Log Viewer Page	EPPCM_MLOG_VIEWER	**Content Management** > **Administration** > **View Content Migration Log**	View all changes that are associated with the content migration.
My Content Migrations Status Page	EPPCM_MIG_STATMAIN	My Content, My Content Migrations	View migration requests requiring attention.

Understanding Content Migration

Content migration is an easy end-to-end solution that you can use to migrate content data being developed in a staging database before it is required on the production database. A content migration cycle consists of:

- Configuring and setting approver.
- Previewing results and sending notification to approver.
- Previewing and approving the data by approver.

  The preview and approval processes can be repeated many times per migration cycle if multiple approval phases are necessary.
- Running migration.

After the content migration is run, the migration cycle is complete regardless of whether it succeeds or fails. And then, a new migration ID is generated for the next migration cycle.

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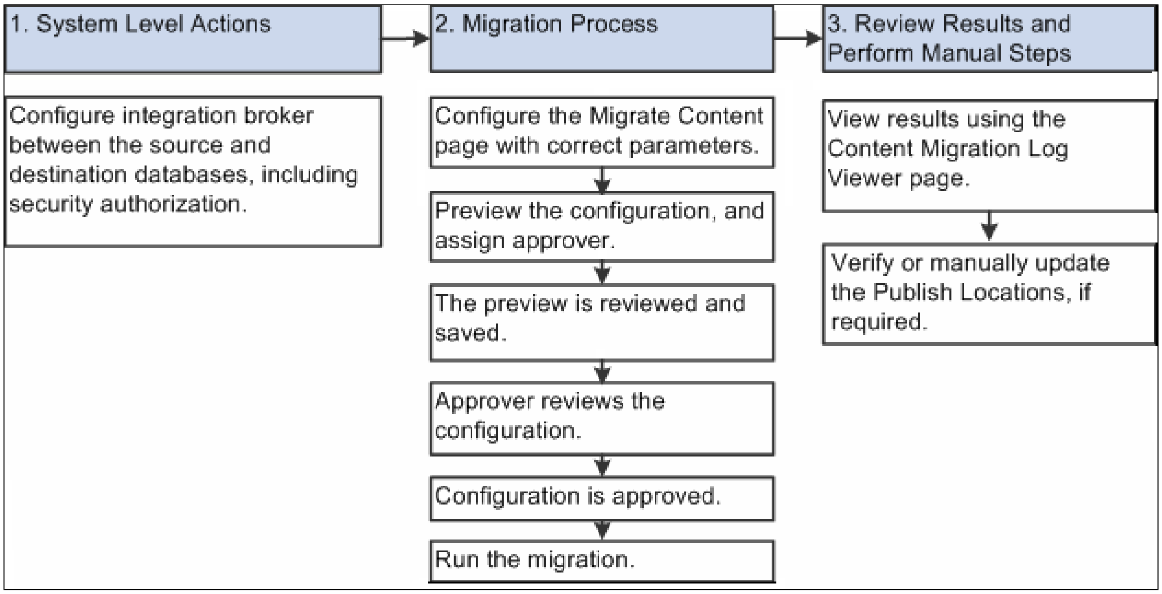
This example illustrates a high-level overview of requirements to run content migration.



In a migration process:

- Each migration cycle—from migration definition creation to data validation and actual execution—is identifiable by a migration ID, and complete logs for each migration cycle are available in both source and target databases.
- The security authorization for the process execution can be set as appropriate in Integration Broker gateway, Integration Broker messages security, Application Engine process security, Content Migration page, and Log Viewer page.

  See *PeopleTools: PeopleSoft Integration Broker*, *PeopleTools: Application Engine*.

  See Migrate Content Page.
- Previewing of the expected results is required before a migration can occur.

  See Content Migration - Preview Selection Page.
- Source folders with *Require Approval* setting need migration approval.

  Source folders with *Optional Approval* or *Auto-Approved Content* setting do not need migration approval.

  See Folder Properties Page.
- Content security authorization is not migrated to the target database, and content owner and administrator are responsible for setting as appropriate.

  Security is inherited from the target folder set for the migration.

Configuring the Source and Target Systems

Before you perform content migration, ensure that:

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- A target folder exists.
- Both target and source database are at the same PeopleSoft Interaction hub version.

  Note: You must set up Integration Broker for the source the target databases before you run the migration.

  See Verifying Service Operation and Adding Routing for REQUEST Message in the Source Database.

Oracle recommends that:

- Before you run the migration to a production database, follow necessary database backup and recovery procedures in the event of data corruption due to migration process failure.

  Security roles, permissions, and users should be synced between the two databases.
- You run only one migration at a time to prevent conflicts that arise from concurrent migration attempts.

Content migration should be performed by users who have the Content Administrator permissions. The Content Administrator permission settings are delivered by default. Take preventive measures such as previewing the expected results using the Content Migration - Preview Selection page and requiring an approver to review the migration configuration before allowing an actual migration to occur.

Data that is migrated takes on the privileges as assigned by the target database. Because privileges are assigned to folders and not content within Content Management, privileges are inherited from the target folder ID. Viewer roles are not migrated over from the source database and instead use the viewer roles as defined in the target database.

Also note that:

- The document storage of the source folder is retained upon migration.

  For example, if migrating from the source folder is defined with storage *CMDOCDB*, the content will be stored in the target folder as *CMDOCDB*.
- If migrating content for files on an ftp server, the attachment file storage of the target portal must point to the same location.

  If the attachment file storage of the target portal does not point to the same location, the source file should be located using its *attachsysfilename* and manually copied to the target location.

See Verifying Service Operation and Adding Routing for REQUEST Message in the Source Database.

Migrate Content Page

Use the Migrate Content page (EPPCM_MIG_RUN) to migrate content data being developed in a staging database before it is required on the production database.

Navigation:

Content Management > **Administration** > **Migrate Content**

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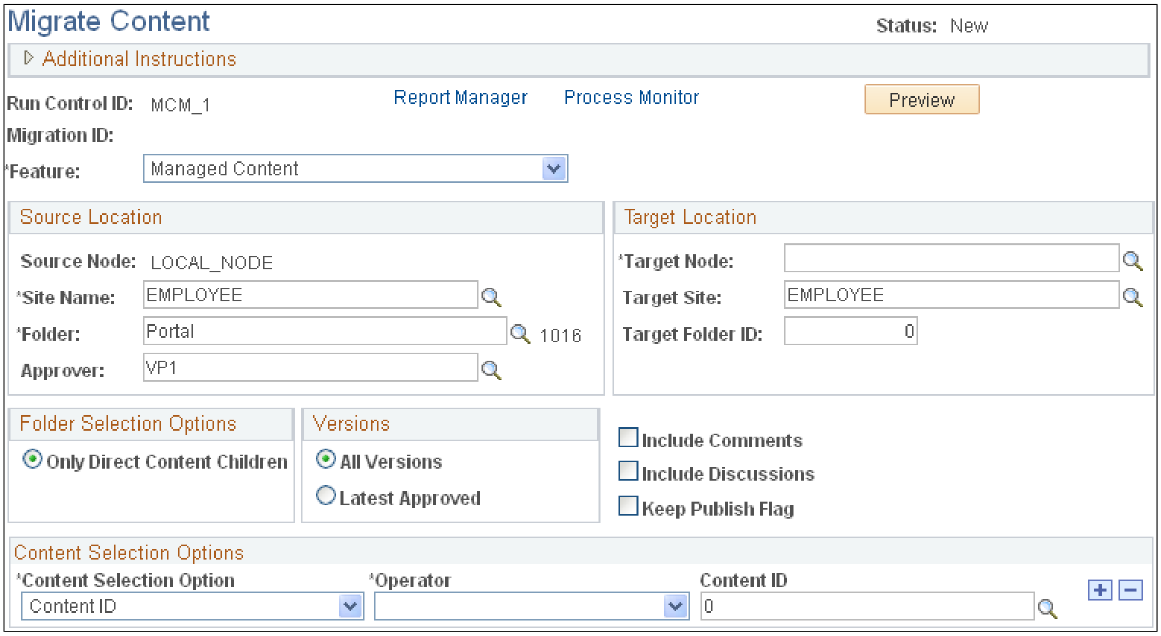
This example illustrates the fields and controls on the Migrate Content page. You can find definitions for the fields and controls later on this page.



Note: This page enables you to submit the Application Engine program that launches the migration using the Integration Broker.

Field or Control	***Description***
Run Control ID	Displays the run control ID of this application engine process.
Report Manager	Click to access the Report Manager module to view report results.
Process Monitor	Click to access the Process Monitor to view the status of job requests.

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Field or Control	***Description***
Preview	Click to run the preview Integration Broker message and display the expected results. When you click the **Preview** button, the target database analyzes the information and sends back a message containing the expected result. No content changes are made to the target database. The information generated during the preview process is saved in the source and the target database. Also, in the Content Migration - Preview Selection page: • The information of the source database and target database is displayed. • The migration status show whether the content already exists. After you modify the configuration as suggested, the migration can proceed. See Steps Used to Migrate Content. See Content Migration - Log Viewer Page.
Run	Click to access the Process Scheduler Request page, where you can start the Application Engine process to migrate content. The results of the migration are saved and viewable on the Content Migration - Log Viewer page. A copy of the migration results is saved on the source database. A message that includes the details of content migration configuration is sent to the destination database. See *PeopleTools: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests.”
Migration ID	The migration ID is a system-generated identifier to uniquely identify a migration cycle. After the migration is run, the migration cycle is complete regardless of whether it succeeds or fails. And then a new migration ID is generated for the next migration cycle.

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Field or Control	***Description***
Feature	Available options are: • *Managed Content* Any type of managed content—HTML, Text, URL, image, or file attachment—in all portals is available using this option. • *Collaborative Workspaces* (CW) For CW documents, a workspace is required and the same workspace must exist in the target database. You can only migrate between workspaces that have names alike. When this option is selected, the workspace search is available and you can select a workspace from a list of all workspaces in the system. **Note:** All content types within managed content and collaborative workspace documents are valid for migration. For CW, documents imported from Managed Content cannot be migrated. If required, user should migrate the original content from Managed Content, and then import into the workspace.
Include Comments	Select to also migrate comments associated with the content.
Include Discussions	Select to also migrate discussions associated with the content.
Keep Publish Flag	Select to keep the content that is published when migrated to target database. When this option is selected, a separate project that will be imported into the target database to satisfy the publish flags. For example, if you want to migrate content that is published using the Pagelet Wizard, you need to create a project containing the content references (CREF) and objects of the pagelet pointing to this content to be imported on the target database, and select the **Keep Publish Flag** option for the migration. When this option is deselected, you must manually re-create the publish locations. For example, if you want to migrate content that is published using the Pagelet Wizard, and you want to manually run the steps to re-create the pagelet after the content has been migrated over, you need to deselect the **Keep Publish Flag** option for the migration.

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Source Location

Field or Control	***Description***
Source Node	Displays the source database information if that information is available.
Site Name	The portal or site from which the managed content that is being copied. If the *Collaborative Workspaces* option is selected in the **Feature** field, this site name is the name of the source workspace.
Folder	The source folder of the content for migration. Data is updated based on folder selection as well as content criteria. You must specify the source folder of the content.
Approver	Optionally, select an approver who must review changes that are made to the Migrate Content page before migration can proceed. The lists of possible approvers are defined at a global level from the PeopleSoft Interaction hub Options page based on a role. The role can be user-defined, but the default role is Content Administrator. Approval requirement is determined from the source folder approval definition. If approver is set in the Migrate Content page, the **Run** button is not active. An email notification is sent to the approver requesting that the approver access the Migrate Content page. The **Approve** and **Reject** buttons are available for approvers on this page with a link to the preview results. If the content migration is approved, the **Run** button is active and an email is sent to the user who created the content migration that approval has been sent. If the content migration is rejected, an email is sent to the user that the changes have not been accepted. See Managing Content Migration Approvals. See Understanding Setup of the Content Management System.

Target Location

Field or Control	*Description*
Target Node	Select the target database information.
Target Site	Select the name of the portal that the content will be copied to for managed content. If the *Collaborative Workspaces* option is selected in the **Feature** field, this is the target workspace of the content.
Target Folder ID	Select the destination folder to which content will be migrated. This destination folder must exist. If the *Collaborative Workspaces* option is selected in the **Feature** field, the default value is *0* (for top folder).

Folder Selection Options

Field or Control	*Description*
Only Direct Content Children	Indicates that only content that is directly in the folder will be migrated.

These are examples of migrating data to a target database with no conflicts:

- Migrating direct children only: suppose that content ID 45, 60, and 89 are residing in the source folder. After the migration, all content ID (45, 60, and 89) will be migrated to the target folder ID.
- Migrating direct children only: Suppose that content ID 45, 60, and 89 are residing in the source folder, with a criterion migrate only data with content ID greater than 50. After the migration, content 60 and 89 will be migrated to the target folder ID.

This is an example of migrating data to a target database with conflict: Suppose that content ID 145 exists in the source database and this content ID 145 also exists in the target database. With a default action of *Skip,* the data is not migrated. With an action of *Create new ID,* the data is migrated but with a new content ID as assigned by the target system. With an action of *Create new version,* the data is migrated to the same content ID but is added as the latest version of the content.

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Versions

Field or Control	***Description***
Versions	Select *All Versions* to migrate all versions, or select *Latest Approved* to migrate only the latest approved version of the content.

Content Selection Options

This section enables you to specify the criteria you can use to select content.

Field or Control	***Description***
Content Selection Option	Available options are: • *Content ID*: At least one row of criteria is required and multiple rows of criteria are combined by AND when the system generates the SQL query. • *Folder ID*: The criteria is optional and all content within the folder will be migrated by default. • *Created by User ID*: The User ID search is active. • *Last Updated Date*: The User ID search is active. • *Last Updated by User ID*: The Date search is active.
Operator	Available options are: • *Equal To* • *Greater Than* • *Greater Than or Equal To* • *Less Than* • *Less Than or Equal To* • *Not Equal to*

Steps Used to Migrate Content

This section discusses how to:

- Migrate content that already exists in the target database.
- Migrate content that does not exist in the target database.

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- Migrate content with discussions.
- Migrate content without discussions.
- Inquire migrations.

Migrating Content that Already Exists in the Target Database

To migrate content that already exists in the target database:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or select an existing one.
3. Confirm that at least two of the contents selected already exist in the target database.
4. Of the two existing contents in the target database, verify the default action as *Skip if Exists* for one content and set action to *Create New ID* for the other content.
5. Save your settings.
6. If approval is required, get the run control approved.
7. Click the **Run** button to submit the migration and verify the process runs to *Success.*
8. In the target database, access the target folder and note that:
   - The content with action *Create new ID* has been added with the Migration ID of the target database.
   - The content with action *Skip* has not been added.
9. In the target database, select **Content Management** > **Administration** > **View Content Migration Log.**
10. Select the Migration ID and verify the Results log that shows only the added content.
11. In the source database, select **Content Management** > **Administration** > **View Content Migration Log.**
12. Select the Migration ID and verify the Results log that is the same as the log of the target database.

Migrating Content that Does Not Exist in the Target Database

To migrate content that does not exist in the target database:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or select an existing one.
3. Confirm that at least two of the contents selected do not exist in the target database.
4. Of the two existing contents in the target database, verify the default action as *Create New ID* for one content and set action to *Skip if Exists* for the other content.
5. Save your settings.

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6. If approval is required, get the run control approved.
7. Click the **Run** button to submit the migration and verify the process runs to *Success*.
8. In the target database, access the target folder and note that:
   - The content with action *Create New ID* has been added with the next Content ID of the target database.
   - The content with action *Skip* has been added with the Content ID of the source database.
9. In the target database, select **Content Management** > **Administration** > **View Content Migration Log.**
10. Select the Migration ID and verify the Results log that shows the added contents.
11. In the source database, select **Content Management** > **Administration** > **View Content Migration Log.**
12. Select the Migration ID and verify the Results log that is the same as the log of the target database.

Migrating Content with Discussions

To migrate content with discussions:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or modify an existing one.
3. Select a content with discussions.
4. Select the **Include Discussion** option.
5. Run the migration.
6. Verify in the target database that migrated content has discussions.

Migrating Content Without Discussions

To migrate content without discussions:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or modify an existing one.
3. Select a content with discussions.
4. Clear the **Include Discussion** option.
5. Run the migration.
6. Verify in target database that migrated content does not has discussions.

Inquiring Migrations

To inquire migrations:

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1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Select an existing run control.
3. Note that:
   - All input fields are available for the processes that have a status of *Previewed, Approved,* or *Rejected.*
   - All input fields are not available, except the **Preview** button, for the processes that have a status of *Awaiting Approval* or *Success.*

Content Migration - Preview Selection Page

Use the Content Migration - Preview Selection page (EPPCM_MIG_PVIEW) to preview your selections before the content is migrated and determine whether the content can be migrated.

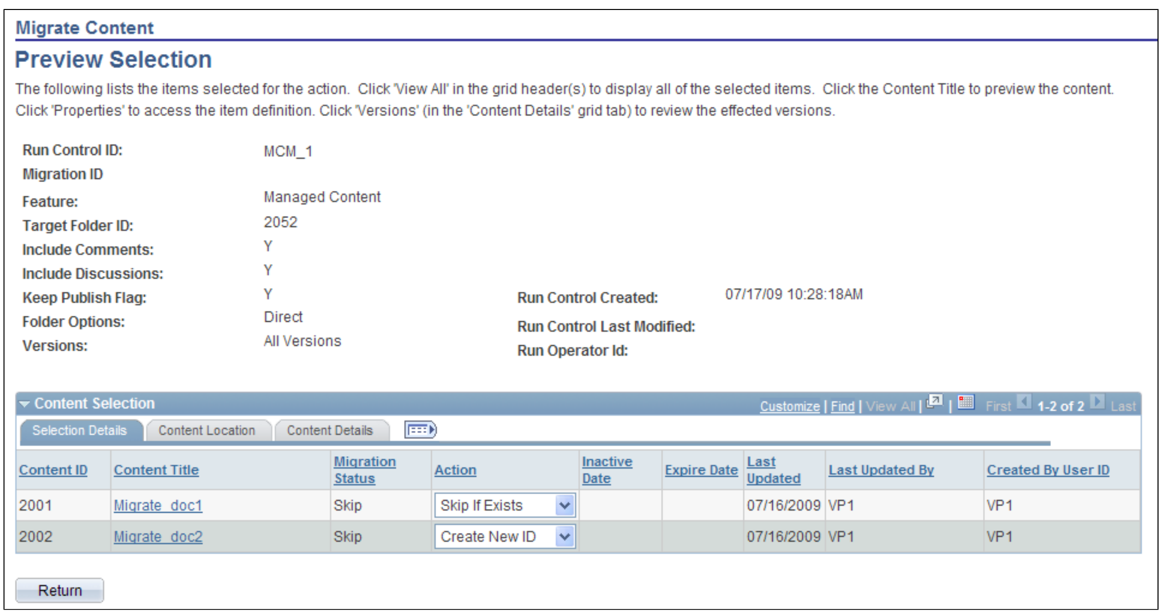
Also define actions for each content ID when migrating.

Navigation:

Content Management > **Administration** > **Migrate Content**

Click the **Preview** button on the Migrate Content page.

This example illustrates the fields and controls on the Content Migration - Preview Selection page, Selection Details tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Run Control ID	Displays the run control ID that is used for the migration process.

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Field or Control	*Description*
Migration ID	Displays the ID of the content migration attempt.
Feature	Indicates the features to which the content is migrating. Value is either *Managed Content* or *Collaborative Workspaces*.
Target Folder	Displays the destination folder to which content will be migrated.
Run Control Created	Displays the ID of the user who initiates the migration, and the time that the migration was initiated.
Run Control Last Modified	Displays the ID of the user who last modified the run control, and the time that the run control was last modified.
Approver	Displays the approver, if an approver exists.
Approval Date	Displays the approval status and the date when the migration was approved.
Migrate discussion and comments	Indicates whether discussions and comments will be migrated along with content.
Versions	Indicates the versions of the content that will be migrated.

Selection Details

Field or Control	*Description*
Content ID	Indicates the content ID that will be migrated.
Content Title	Click to access the content details page, where you can view and edit the content.
Migration Status	Displays the migration status of each piece of content, including: • *New:* The content ID does not exist in the target database. • *Skip:* The content ID exists in the target database. • *Error:* An error occurred when you were trying to migrate the data.

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Field or Control	***Description***
Actions	Each content ID has its own action when migrating. The default action is *Skip If Exists* if the Migration Status is *Skip.* The default action is *Create New ID* if the Migration status is *New.* These default actions appear on the Content Migration - Preview Selection page. Available actions are: • *Skip If Exists:* If a content ID already exists in the target database, skip migration of this content ID. • *Create New ID:* If a content ID already exists, use the new ID for the migrated content. If no content ID exists, use the same ID for the migrated content. The **Action** column shows the action that is intended to take place. The preview process can be run multiple times per migration cycle, but only the last preview to be run has its information retained in the database. Because the preview data does not exist in the target database, only the content ID, content title (without link to the content), migration status, and action are shown when you view the preview from the destination database.

This table lists and summarizes the actions when you selected the *All Versions* option on the Migrate Content page:

Action	***Content Exists in Target Database***	***Content Does Not Exist in Target Database***
Skip If Exists	Skip the migration of this content ID.	Create all versions with the source content ID.
Create New Version	N/A. This is not a valid action for the All Versions option.	N/A. This is not a valid action for the All Versions option.
Create New ID	Create all versions with a new content ID.	Create all versions with the source content ID. **Note:** The Content Migration function always uses the same content ID first.

This table lists the actions when you selected the *Latest Approved* option on the Migrate Content page:

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Action	***Content Exists in Target Database***	***Content Does Not exist in Target Database***
Skip If Exists	Skip the migration of this content ID.	Create the latest approved version with the source content ID and version 1.
Create New Version	Create the latest approved version with the source content ID and the next target version.	Create the latest approved version with the source content ID and version 1.
Create New ID	Create the latest approved version with a new content ID and version 1.	Create the latest approved version with the source content ID and version 1.

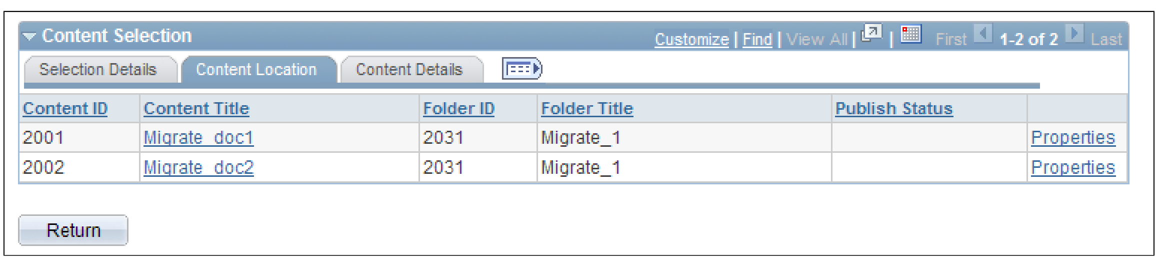
For example, you can migrate content 2002 and 2003 in the source database to the target database with the action set to *Create New ID.* In the target database, by default, the Last Content ID in the EO_PE_OPTIONS table is 2000. The Content Migration function first uses the same source content ID and adds content to target database as 2002 and 2003, because these IDs do not exist in the target database.

You can then submit a second migration process with the same content 2002 and 2003 with the action set to *Create New ID.* In this second migration, because content ID 2002 and 2003 already exist in the target database, the new content ID is auto increment from the Last Content ID *plus 1* in the EO_PE_OPTIONS table, so the function that generates the next ID verifies if the ID is being used. If the ID is being used, the Content Migration function assigns the next available ID. In this second migration, content 2002 is added to the target database as content 2001, and content 2003 is added to the target database as content 2004.

Content Location

This is an example of the Content Migration - Preview Selection page, Content Location tab:

This example illustrates the fields and controls on the Content Migration - Preview Selection page, Content Location tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Publish Status	Indicates whether the content is published, pending, approved, rejected, or draft.

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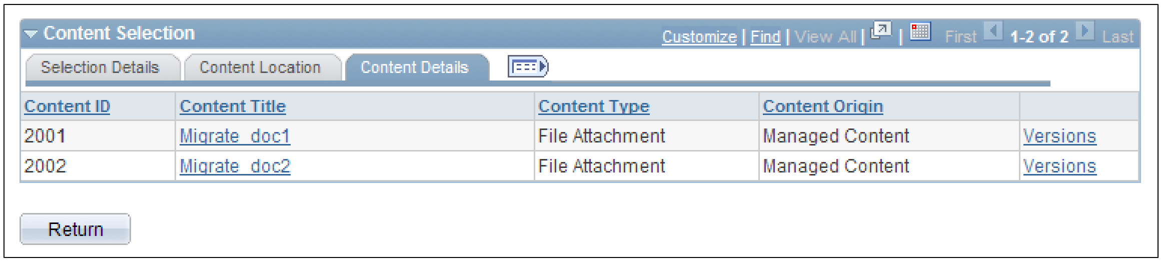
Field or Control	***Description***
Properties	Click to access the content properties page, where you can view and edit property details for this content.

Content Details

This example illustrates the fields and controls on the Content Migration - Preview Selection page, Content Details tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Versions	Click to access the File Attachment Properties - Content Versions page, where you can review, delete, or check out different versions of a specific content item.

Steps Used to Preview Content Migration

This section discusses how to:

- Preview a new content that exists in the target node.
- Preview a new content that does not exist in the target node.
- Preview an existing content that was updated.
- Preview a migration whose header was updated.
- Preview a migration whose content list was updated.
- Preview a migration that was successfully.

Previewing a New Content that Exists in the Target Node

To preview a new content that exists in the target node:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control.
3. Enter values for the required fields.

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For example, **Source Folder, Target Folder, Target Node,** and so on.

4. Set the **Content Selection** field to indicate the content already exists in the target database.
5. Click the **Preview** button.
6. Verify that the default values of the **Migration Status** and the **Action** fields are*Skip.*
7. Save your settings.

Note: If the Migration Status and the Action values are *Skip,* an error message appears requiring at least one Action value to be *Create.*

---

8. Modify and save your settings.
9. Select **Content Management** > **Administration** > **View Content Migration Log.**
10. Select the newly-added Migration ID.

    The **Preview** link is enabled and the **Results** link is disabled.
11. Click the **Preview** link.

    The **Content Migration Status** and **Actions** fields match the values on the run control.
12. Log into the target node and verify the **Preview Log** matches the log on the source node.

Previewing a New Content that Does Not Exist in the Target Node

To preview a new content that does not exist in the target node:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control.
3. Set the **Content Selection** to indicate the content does not exist in the target database.
4. Click the **Preview** button.

    Note that:

    - The **Migration Status** field is set to *New.*
    - The **Action** field is set to *Create New ID.*

5. Save your settings.
6. Select **Content Management** > **Administration** > **View Content Migration Log.**
7. Select the newly-added Migration ID.

    The **Preview** link is enabled and the **Results** link is disabled.
8. Click the **Preview** link.

    The **Content Migration Status** and **Actions** values match the values on the run control.

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9. Log into the target node and verify the Preview Log matches the log on the source node.

Previewing an Existing Content that was Updated

To preview an existing content that was updated:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Select an existing migration run control with that status of *Previewed.*
3. Click the **Preview** button.
4. Modify the **Action** option.
5. Save your settings.
6. Select **Content Management** > **Administration** > **View Content Migration Log.**
7. Select the Migration ID and click the **Preview** link.

   The Action value for the updated content matches the value on the run control.
8. Log into the target node and verify the Preview Log matches the log on the source node.

Previewing a Migration Whose Header was Updated

To preview a migration whose header was updated:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Select an existing migration run control with the status of *Previewed.*
3. Modify a field that does not affect the content selection.

   For example, **Include Comments, Include Discussions,** or **Keep Publish Flag.**
4. Save your settings.
5. Select **Content Management** > **Administration** > **View Content Migration Log.**
6. Select the Migration ID and click the **Preview** link.

   The new field value was updated to the log.
7. Log into the target node and verify the Preview Log matches the log on the source node.

Previewing a Migration Whose Content List was Updated

To preview a migration whose content list was updated:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Select an existing migration run control with the status of *Previewed.*
3. Select a new source folder so there is a new set of content selected.
4. Save your settings.

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5. Select **Content Management** > **Administration** > **View Content Migration Log.**
6. Select the Migration ID and click the **Preview** link.

   The content list was updated to the Preview Log.

   Content Migration - Preview Selection page, Content Location tab
7. Log into the target node and verify the Preview Log matches the log on the source node.

Previewing a Migration That Run Successfully

To preview a migration that run successfully:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or select an existing one.
3. Submit the run process.
4. Select an existing migration run control with the status of *Success.*

   All fields are disabled and the **Preview** button is active.
5. Click the **Preview** link.

   The Migration Status of the content is set from the Preview Log. For example, if the content has been successfully updated into the target node, the Content status value is the same as before the run.

Managing Content Migration Approvals

Approval and request for approval occurs on the source database. If the approver is set on the Migrate Content page, the **Run** button is not active and an email is sent to the approver to access the Migrate Content page. The approver either approves or rejects the migration. If the approver approves the migration, the **Run** button is active and an email is sent to the user who created the run control that approval has been sent. If the approver rejects the migration, an email is sent to the user that the changes have not been accepted; the user can make changes to the migration configuration and repeat the migration process until it is approved.

This section discusses how to:

- Verifying content migration with the source folder that does not require approval.
- Set the source folder to skip the content migration approval.
- Submit a migration for approval.
- Approve a migration.
- Reject a migration.

Verifying Content Migration with the Source Folder that Does Not Require Approval

To view content migration with the source folder that does not require approval:

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1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or modify an existing one.
3. Select a source folder that does not require approval.
4. Note that:
   - The **Approver** field is not visible.

     The **Approver** field in the Migration Content page is not visible when the Approval field in the Folder Properties page is set to *Auto-approved* or *Optional Approval.*
   - The **Migration Status** field is set to *Previewed.*
   - The **Run** button is visible and enabled.

Setting the Source Folder to Skip the Content Migration Approval

To set the source folder to skip the content migration approval:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Create a new run control or modify an existing one.
3. Select a source folder that requires approval (the **Approver** field is visible).
4. Clear the Approver field.
5. Preview the migration content and save your settings.

   The **Migration Status** field is set to *Previewed.* The **Submit for Approval** button is visible and enabled.

Submitting a Migration for Approval

To submit a migration for approval:

1. Select **Content Management** > **Administration** > **Migrate Content.**
2. Select a migration with the status of *Previewed* and a source folder that requires approval (a blank approver).

   A source folder needs approval if the Approvals field in the Folder Properties page is set to *Requires Approval.*
3. Click the **Submit for Approval** button.

   An error message appears requiring an approver's ID.
4. Click the **Approver** search icon.

   User IDs appear depending on the setting of the Approver role in the Installation Options page.
5. Select an approver.

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6. Save your settings.

   Note that:

   - The migration status changes to *Awaiting Approval.*
   - All fields are disabled except the **Preview** button.
   - An email notification is sent to the approver.

7. Select **Content Management** > **Administration** > **View Content Migration Log.**
8. Select the Migration ID.

   The migration status was updated in the Preview Log.

Approving a Migration

To approve a migration:

1. Login as an approver.
2. Select **Content Management** > **Administration** > **Migrate Content.**
3. Select a migration with the status of *Awaiting Approval.*

   The **Reject** and **Approve** buttons are visible and enabled.

4. Click the **Approve** button.

   Note that:

   - The **Migration Status** is set to *Approved.*
   - All fields are enabled.
   - The **Run** button is visible and enabled.
   - The **Approve** and **Reject** buttons are invisible.
   - An email notification is sent to the migration initiator.

5. Select **Content Management** > **Administration** > **View Content Migration Log.**
6. Select the Migration ID.

   The status was updated in the Preview Log.

Rejecting a Migration

To reject a migration:

1. Login as an approver.
2. Select **Content Management** > **Administration** > **Migrate Content.**

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3. Select a migration with the status of *Awaiting Approval.*

   The **Reject** and **Approve** buttons are visible and enabled.

4. Click the **Reject** button.

   A secondary page opens asking approver to enter an optional reason.

5. Optionally, enter a reason and click the **OK** button.

   Note that:

   - The **Migration Status** is set to *Rejected.*
   - All fields are enabled.
   - The **Approve** and **Reject** buttons are invisible.
   - The **Preview** button is visible and enabled.
   - An email notification is sent to the migration initiator.

6. Select **Content Management** > **Administration** > **View Content Migration Log.**

7. Select the Migration ID.

   The status was updated in the Preview Log.

Running Content Migration

Migration is carried out by an application engine job (EPPCM_MIG), which is a batch process.

Use the Process Scheduler Request page (PRCSRQSTDLG) to specify process variables.

Navigation:

Content Management > **Administration** > **Purge/Inactivate**

Click the Run button on the Purge/Inactivate page.

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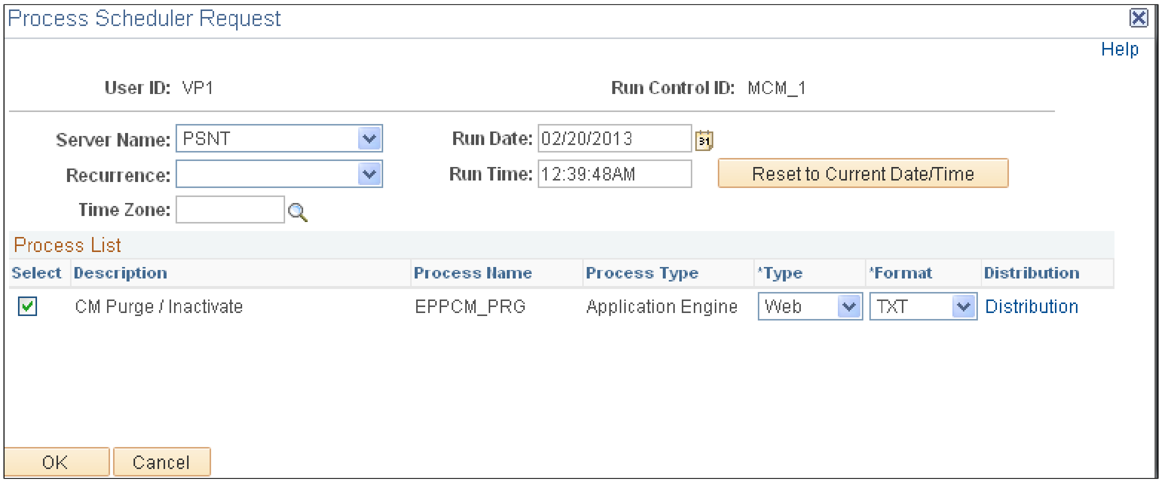
This is an example of the Process Scheduler Request page.



After you have run your process using the Process Scheduler Request page, use the Process Monitor page to monitor the status of your process request. You use Process Monitor to:

- Check the status of your submitted process requests.
- Cancel process requests that have been initiated or are currently processing.
- Hold process requests that are queued, and queue process requests that you have put on hold.

You can also use the Process List page to view the status of submitted process requests.

See *PeopleTools: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests," Scheduling Process Requests.

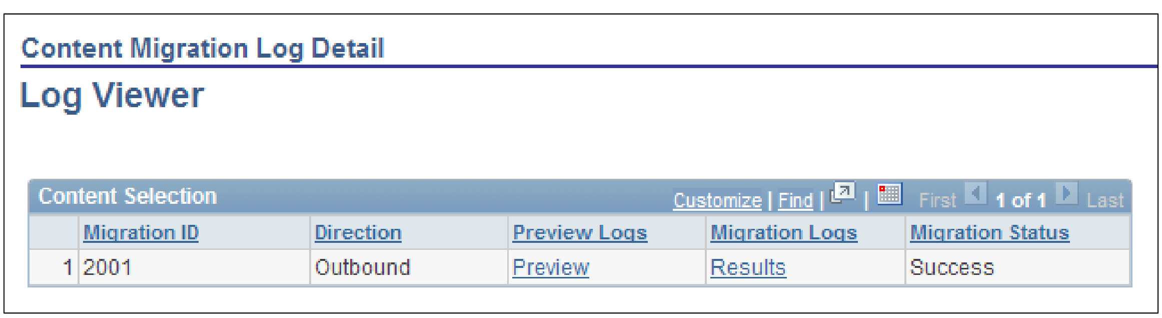
Content Migration - Log Viewer Page

Use the Content Migration - Log Viewer page (EPPCM_MLOG_VIEWER) to view all changes that are associated with the content migration.

Navigation:

Content Management > **Administration** > **View Content Migration Log**

This example illustrates the fields and controls on the Content Migration - Log Viewer page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Migration ID	Displays the identification of a migration attempt.
Migration Direction	Displays the value of *Source* or *Target,* depending on which database the log is viewed from. If the value is *Source,* the database from which you are viewing the log is the source database. If the value is *Target,* the database from which you are viewing the log is the target database of the migration.
Preview Logs	Click the **Preview** link to access the Content Migration - Preview Selection page with saved preview results based on the migration ID. See Content Migration - Preview Selection Page.
Migration Logs	Click the **Results** link to access the logged results based on the migration ID. See Content Migration - Log Viewer Page.
Migration Status	Displays the progress of the migration. Available options are: • *Migration definition created* • *Previewed* • *Awaiting approval* • *Approved* • *Running* • *Success* • *Success with warnings* • *Error* **Note:** A partial migration can occur before an error occurs.

Note: The logs are stored and synced on both the source and the target databases, so you can view those logs on either system.

Migration Log Results

Migration log results are stored in the source and the target database. Logging includes full details of running the content migration process, including:

- The user who created the run control.

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- The time the run control was created.
- The time the run control was last modified.
- The approver, if one exists.
- The approval date and time.
- The user who initiates the migration.
- The time the migration starts.
- The time the migration ends.
- The migration ID.
- The migration configuration parameters, including all information about the Migrate Content page.
- Content details, including data from the content tables EPPCM_CONTENT that will be migrated.
- The migration status of each content ID, including:
  - *New:* The content ID does not exist in the target database.
  - *Skip:* The content ID exists in the target database.

    Action of each content ID is either *Skip, already exists,* or *Create New ID.*
  - *Create new version:* The content ID exists in the target database, so a new version of the content will be created.
  - *Error:* An error occurred while you were trying to migrate the data.

    If an error occurred, a detailed error message is logged so that the content administrator can take proper actions.
- Source and target nodes.
- Source and target database names.

Note: The logging details above applies to both the Content Migration - Preview Selection page and the actual results of running a migration.

Errors During the Content Migration

The content migration process cannot proceed if you receive any of these error messages:

- Invalid target folder ID.

  The folder ID does not exist, or the folder cannot store the type of content selected for migration.
- Invalid content selection options.

  The criteria set does not have any content migrated.

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Errors for Migration to Fail on Content

The migration fails on content if you receive any of these error messages:

- SQL error (problem updating tables).

  To rectify, verify the database configuration.

  See *PeopleTools: System and Server Administration*

- Integration Broker errors.

  To rectify, review the Integration Broker logs and verify the Integration Broker configuration.

  See *PeopleTools: PeopleSoft Integration Broker*

- Application Engine errors.

  To rectify, review the Application Engine logs and verify the Application Engine configuration.

  See *PeopleTools: Application Engine*

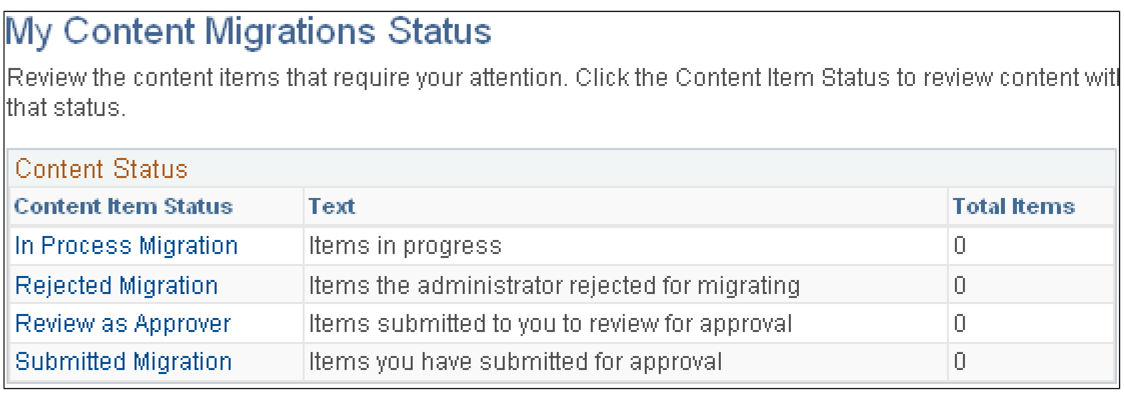
My Content Migrations Status Page

Use the My Content Migrations Status page (EPPCM_MIG_STATMAIN) to view migration requests requiring attention.

Navigation:

My Content, My Content Migrations

This example illustrates the fields and controls on the My Content Migrations Status page. You can find definitions for the fields and controls later on this page.



My Content Migrations Status

Review the content items that require your attention. Click the Content Item Status to review content with that status.

Content Status

Content Item Status	Text	Total Items
In Process Migration	Items in progress	0
Rejected Migration	Items the administrator rejected for migrating	0
Review as Approver	Items submitted to you to review for approval	0
Submitted Migration	Items you have submitted for approval	0

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Field or Control	***Description***
Content Status	Click a status link to access the My Content Migrations Status page where you can preview the content items for the selected status: • The *In Process Migration* status consists of new and previewed migrations that were created by the logged-in user. • The *Rejected Migration* status consists of migrations that are created by the logged-in user and are currently in the rejected state. • The *Review as Approver* status consists of migrations in *Awaiting Approval* status for which the logged-in user is assigned as approver. • The *Submitted Migration* status consists of migrations in *Awaiting Approval* status created by the logged-in user.

Verifying Permissions, Updating Publish Locations, and Reversing a Content Migration

After you run a content migration, Oracle recommends you to:

- Verify permissions of the migrated content.

  Note: The migration does not copy permissions to the target; the migrated content inherits the permissions from the target folder.

- Update the publish locations.

  To update locations by import, use a project to import updates to a database.

  To update locations manually, use the Locations page or the Pagelet Wizard.

  See Content Locations Page.

  See Publishing a Folder or Content Item from Pagelet Wizard.

If the content migration completed either successfully or in error, and that content migration must be undone, the Content Migration - Log Viewer page contains all the information required to manually undo, or delete, changes that were made during the migration. You cannot resume the migration process; the migration process must be restarted.

See Content Migration - Log Viewer Page.

Configuring Content Display in a WorkCenter

This section provides an overview of managed content display in a WorkCenter and discusses how to:

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- Enable managed content display in the WorkCenter page.
- Change the default content ratings poll in the related content frame.
- Change the default content ratings poll for specific pieces of content.

Related Links

Viewing Content Using the View Published Content WorkCenter Page

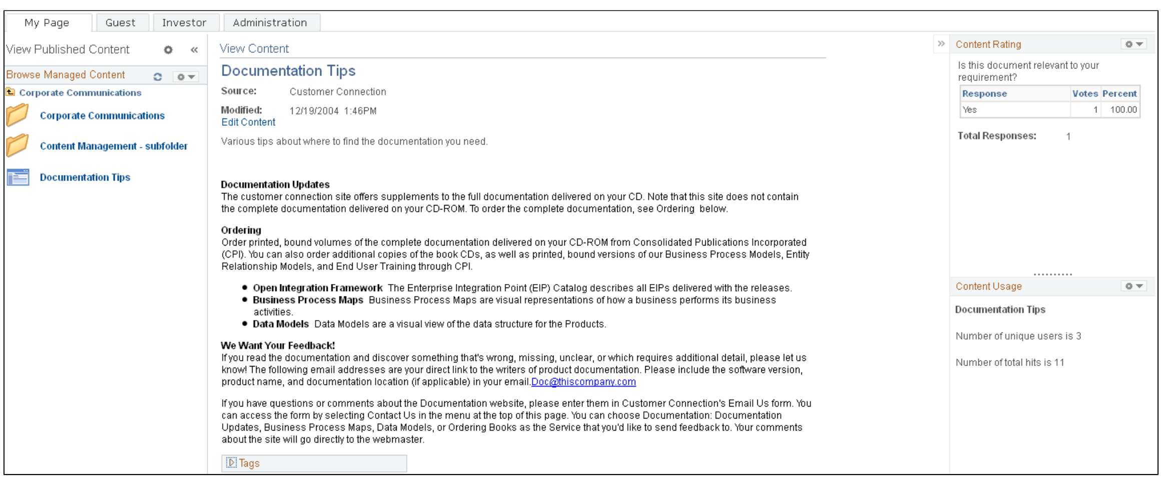
Understanding Managed Content Display in the WorkCenter Page

You can optionally configure PeopleSoft Interaction hub to display published managed content in the View Published Content WorkCenter page. This page enables portal users to see related content while viewing published pieces of managed content. This is a system-wide setting, that applies to all portal users. If this option is enabled, when portal users access published managed content by browsing content folders, viewing search results for managed content, or using a content pagelet on their home page, the content appears in the View Published Content WorkCenter page.

Note: This option is not available for Workspace content. This feature requires PeopleTools 8.52 or higher.

This example shows the View Published Content WorkCenter page.

This example illustrates the fields and controls on the Viewing managed content in the View Published Content WorkCenter page.



- The left frame contains a navigation pagelet.
- The center frame contains the managed content item.
- The right frame contains related content, and includes these paglets:
    - Content Rating

      Use this pagelet to respond to the poll questions for the content item
    - Content Usage

Use this pagelet to review the number of unique users that have accessed the content and the total number of times the content has been viewed.

These pagelets use related content services. Administrators can add additional related content service pagelets to this component using the PeopleTools Related Content framework.

See *PeopleTools: PeopleTools Portal Technologies*, "Developing and Configuring Related Content Services."

Installation Options Page

Use the Installation Options page (EO_PE_OPTIONS) to enable the display of content in the WorkCenter page.

Navigation:

Portal Administration, System Data, Installation Options

Field or Control	***Description***
Enable Content in WorkCenter	Select to use the View Published Content WorkCenter page to display published managed content items.
Auto-open attachment and URL	Select to open the attachments and websites automatically when viewing a content.

The Installation Options page is discussed in detail in *PeopleSoft Interaction Hub: Portal and Site Administration*

See “Installation Options Page” (Portal and Site Administration).

Changing the Default Content Ratings Poll in the Related Content Frame

You can change the default ratings poll to use for managed content items using the **Default Poll** field on the Installation Options page (**Portal Administration** > **System Data** > **Installation Options**).

See “Installation Options Page” (Portal and Site Administration).

Changing the Default Content Ratings Poll for Specific Pieces of Content

Use the Managed Content page (EO_PE_SR_SRV_CM) to change the default ratings poll to use for specific pieces of content.

Navigation:

Portal Administration > **Context** > **Content Ratings** > **Maintain Content Ratings** > **Managed Content**

See “Maintain Content Ratings – Managed Content Page” (Using Portal Features).

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Chapter 3

Accessing Content

Understanding the Folder Hierarchy

In Oracle's PeopleSoft Interaction hub, folders and subfolders are used to organize items in the Content Management system. Each content management feature (Managed Content, Categorized Content, and News Publications) has a folder and subfolder hierarchy that is separate from the other two features. Folders at the root of the hierarchy are known as *top folders.* Each top folder can contain zero or more subfolders; and each subfolder in turn can contain zero or more subfolders, and so on. Content can reside in any folder except at the top (or root) of the folder hierarchy.

In the Content Management system, users can use a number of functions and menu items to access content:

- *Browse Folders* (or *Browse Publications).*

  Enables users to traverse down and up through the folder hierarchy to access folders and content.

- *Search Folders* (or *Search Sections).*

  Enables users to search for folders by folder title, folder ID, parent ID, or by last item added.

- *Search Content.*

  Enables users to use the search index to search for content using keywords.

- *Maintain Content.*

  Enables users to search for content by content title, content ID, content type, parent ID, date added, and inactive date.

Outside of the Content Management system, you can also browse published categorized content from the Browse by Category page.

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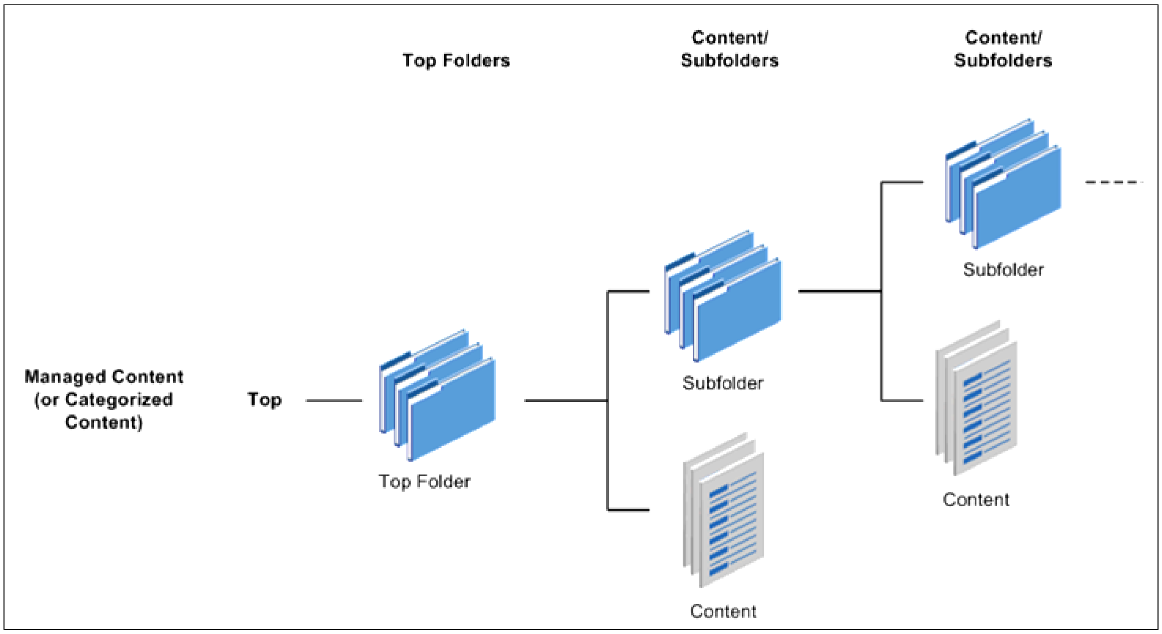
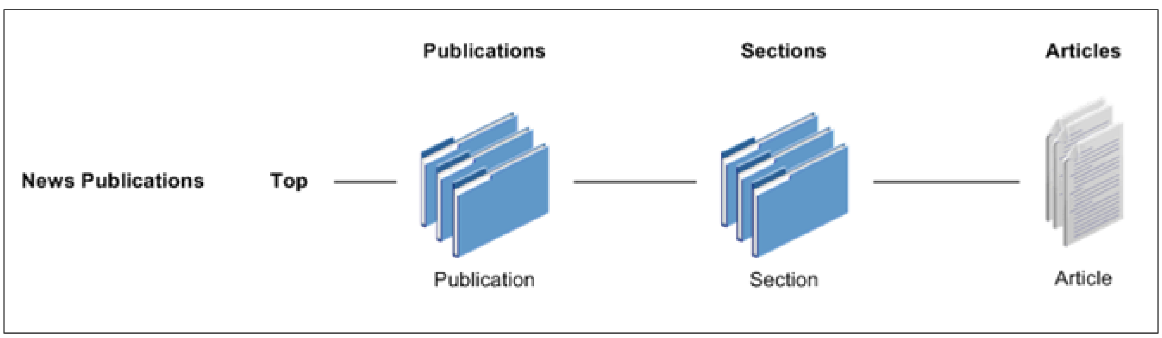
This example illustrates the Managed Content (or Categorized Content) hierarchical relationships.



In the News Publications feature, the terminology and hierarchy are slightly different, but the concepts and access mechanisms are the same. In the News Publications feature, top folders are known as *publications.* In the News Publications feature, only one level of subfolders is allowed, and these subfolders are known as *sections.* Each piece of content within a news publication is called an *article,* and articles can only reside within sections, not in publications.

The example illustrates the News Publication hierarchical relationships.



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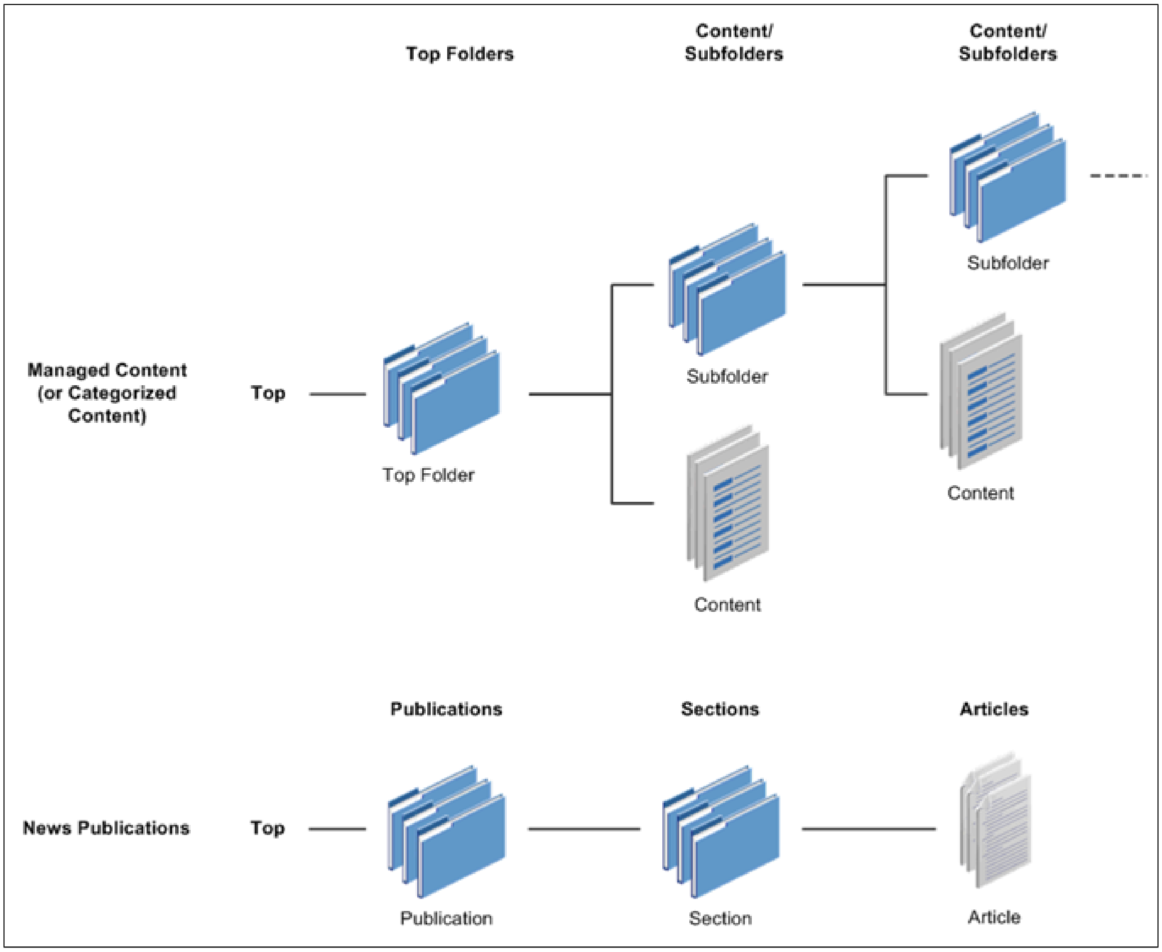
This example illustrates that each Content Management feature (Managed Content, Categorized Content, and News Publications) has a folder and subfolder hierarchy that is separate from the other two features.



Related Links

Browsing All Folders

Browsing Folder Hierarchies

This section discusses using top level browse pages and browsing sub-level Managed Content.

Note: Defining folder properties and setting up their privilege security is not discussed in this chapter because too many variations exist between features.

Pages Used to Browse Folder Hierarchies

Page Name	***Definition Name***	***Navigation***	***Usage***
Browse Content	EPPCM_HIERTOP_MAIN	• **Content Management** > **Managed Content** > **Browse Folders** • **Content Management** > **Categorized Content** > **Browse Folders** • **Content Management** > **News Publications** > **Browse Publications**	Add a top-level folder if you are a top administrator for this feature or, starting at the top level folders, drill down through folder hierarchies for content that is accessible by that feature. See My Managed Content – Checked Out Page.
Browse Managed Content Browse Categorized Content Browse Publication Sections	EPPCM_HIER_MAIN	• **Content Management** > **Managed Content** > **Browse Folders** Click a folder title link on the Browse Managed Content page. • **Content Management** > **Categorized Content** > **Browse Folders** Click a folder title link on the Browse Categorized Content page. • **Content Management** > **News Publications** > **Browse Publications** Click a section title link on the Browse News Publications page.	For Managed Content and Categorized Content, drill down through the folders containing managed content or categorized content. For News Publications, access the Browse Section Articles page.
Browse Section Articles Page	EPPCM_HIERNWS_MAIN	**Content Management** > **News Publications** > **Browse Publications** Click a section that has no children on the Browse Publication Sections page.	Displays basic information about the articles within a single section of a news publication and provides access to article details. You can add, edit, delete, or view articles depending upon article status and member privileges for the section.

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Related Links

Understanding Managed Content
Understanding Categorized Content
Understanding News Publications

Folder Hierarchy Rules

Folder hierarchies and content within Content Management undergo frequent changes. Content is constantly being created, updated, published, relocated, and deleted. Content Management reflects these changes as they occur.

The Browse Folder or Browse Publications menu items are used to start browsing at the top of each content management hierarchy. From there, depending on the feature being browsed, the Browse Managed Content, Browse Categorized Content, Browse News Publication, or Browse Publication Sections page is used to continue browsing through the content hierarchy.

The following rules apply to all Content Management features:

- A portal name of the child folder must match the portal name of the parent folder.
- A feature type of the child folder must match the feature type of the parent folder.
- A folder can have only one parent.
- A folder with itself as the parent is a *Top Folder*.
- Content can have multiple parent folders.
- Content has a single origin feature type.
- Managed Content folders can contain only Managed Content type content.
- All non-Managed Content folders can contain only their own feature type content or Managed Content type content.
- Content originating from a feature type that is different from the one it is being accessed from can only be viewed unless it has been shared to the Managed Content type.

Browse Managed Content Page

Use the Browse Content page (EPPCM_HIERTOP_MAIN) to add a top-level folder if you are a top administrator for this feature or, starting at the top level folders, drill down through folder hierarchies for content that is accessible by that feature.

Navigation:

- **Content Management** > **Managed Content** > **Browse Folders**
- **Content Management** > **Categorized Content** > **Browse Folders**
- **Content Management** > **News Publications** > **Browse Publications**

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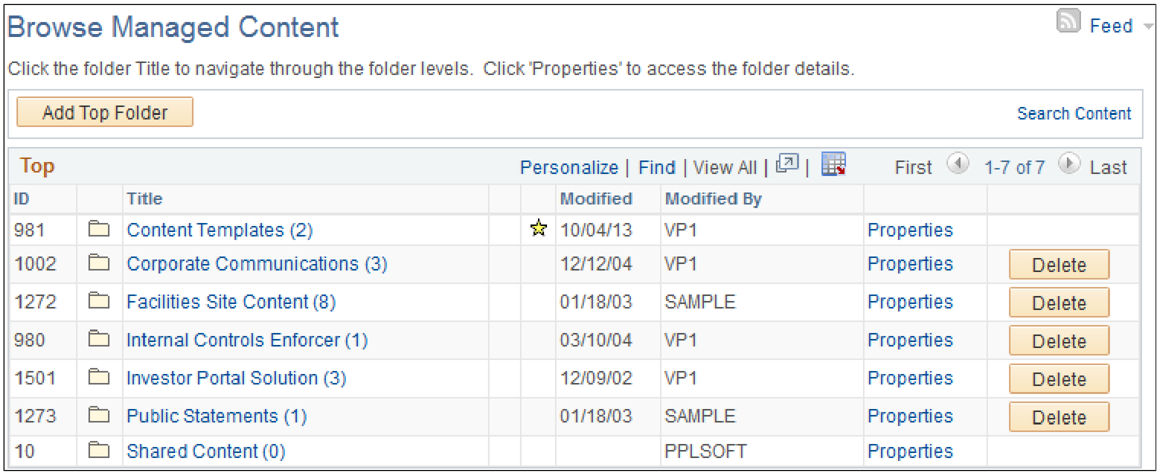
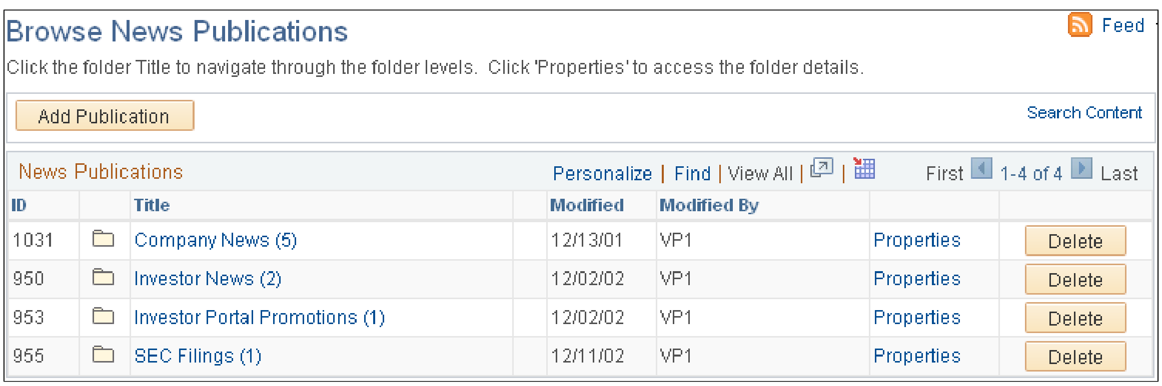
This example illustrates the fields and controls on the Example of a top-level Browse Managed Content page.



Note: The **Content Templates** folder holds the templates that are available in the RTE. For more information about creating the Content Template folder, see "Creating Content Template Folder".

Alternatively, access the Browse News Publications page (select **Content Management** > **News Publications** > **Browse Publications).**

This example illustrates the fields and controls on the Browse News Publications page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Feed	Click to open the feed for this item, if available. See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).
Add Top Folder	Click to create new folder hierarchies or publications.

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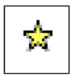
Field or Control	***Description***
Search Content	Click to access the Maintain Content page to access and maintain the properties for the content that you have privileges to view. See Using Other Methods for Accessing Folders and Content.
Title	Click to drill down through the folder hierarchy. The bracketed number indicates the number of folders and documents that are located at the next level. This number does not distinguish between folders and documents.
	Indicates folder that contains recently added contents.
Modified	Displays the date when the content folder was last modified.
Modified By	Displays the user ID who last modified the content folder.
Properties	Click to go to the Folder Properties page to view or edit property details and security for this folder hierarchy.
Delete	Click to delete the associated folder. **Note:** Deleting a folder is allowed only if the folder does not contain any published content. Deleting the folder will cascade the deletion to all of the folder's sub-folders and child content. The *Shared Content* folder is a system folder and cannot be deleted.

Creating Template in the Content Template Folder

The **Content Template** folder holds the templates that are available in the RTE.

1. **Content Management,** > **Managed Content** > **Browse Folders**
2. Click **Content Templates** folder.
3. Click **Add Content**.
4. From the **Content Type** list, select **Text or HTML** and then click **OK**.

Browse Managed Content Page

Use the Browse Managed Content page (EPPCM_HIER_MAIN) to for Managed Content and Categorized Content, drill down through the folders containing managed content or categorized content.

For News Publications, access the Browse Section Articles page.

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Navigation:

- **Content Management** > **Managed Content** > **Browse Folders**

  Click a folder title link on the Browse Managed Content page.

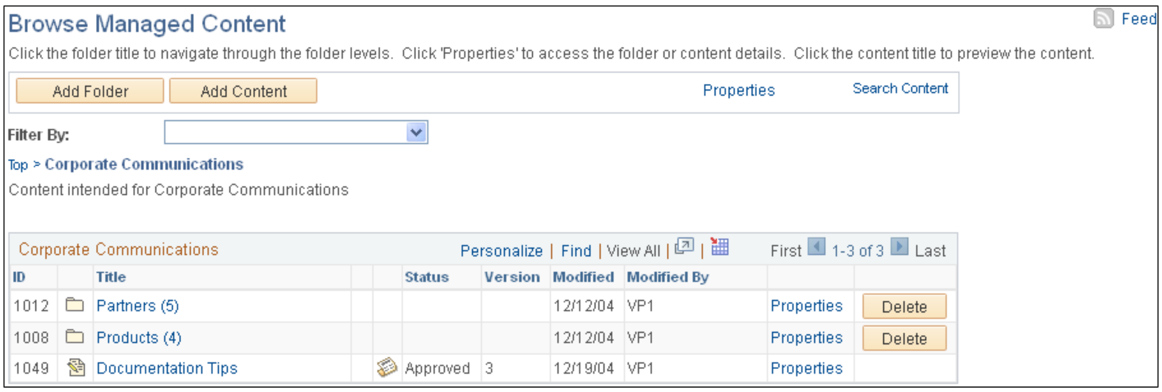
- **Content Management** > **Categorized Content** > **Browse Folders**

  Click a folder title link on the Browse Categorized Content page.

- **Content Management** > **News Publications** > **Browse Publications**

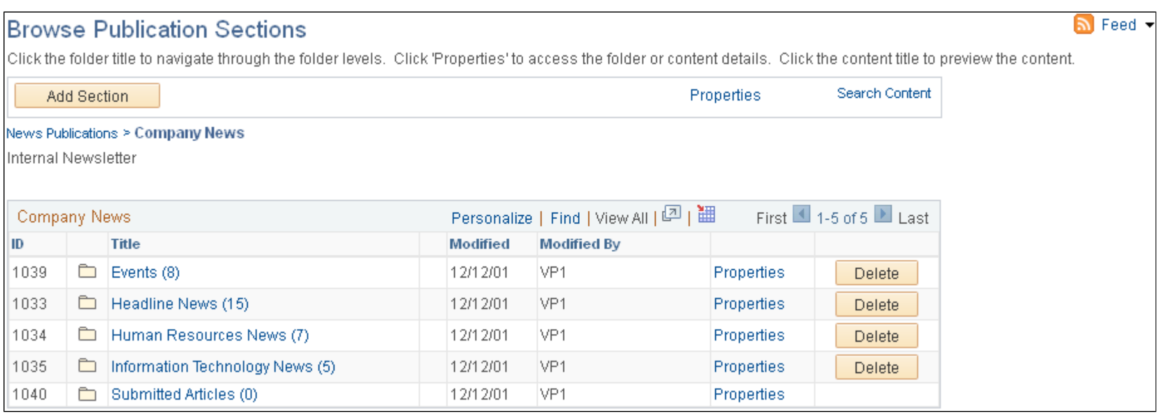
  Click a section title link on the Browse News Publications page.

This example illustrates the fields and controls on the Example of a sublevel Browse Managed Content page.



Alternatively, access the sublevel Browse News Publications page (select **Content Management** > **News Publications** > **Browse Publications** and click a folder title link).

This example illustrates the fields and controls on the Example of the Browse Publication Sections page. You can find definitions for the fields and controls later on this page.



Sublevel Browse Managed Content and Browse Categorized Content pages display basic information about the folders and the content within a folder. Within a top folder or a subfolder, you can add a subfolder, add content, or navigate deeper into the folder hierarchy. Beneath the root folder (Top), locator links enable you to traverse back up the folder hierarchy. A description of the content appears below the locator links. This description can include HTML that is entered in the summary on the Folder Properties page.

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This page provides drill-down access to subfolders as well as a navigation path to return to the top level. Depending on member privileges for the folder, you can add, edit, delete, or view subfolders and content.

Note: Managed Content and Categorized Content hierarchies may contain many subfolder levels.

Depending on the feature, Content Management enables you to add different types of content, such as file attachments, web URLs, text, HTML, and image attachments. Based on the type of content that you select, you have a choice of format; for instance, the format for a file attachment can be Microsoft Word or Adobe Acrobat. The image to the left of the title identifies the format that is used for each content item.

Field or Control	***Description***
Feed	Click to open the feed for this item, if available. See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).
Add Folder	Click to access the Folder Properties page to add a new subfolder.
Add Section	Click to access the Browse Managed Content - Add Content page, where you can specify the type of content you want to add to a folder in managed content.
Add Content	Click to access the Folder Properties page, where you can define the folder properties and details for child content. **Note:** Child content created from this folder uses the specified child default values.
Properties	Click to access the Folder Properties page to view or edit property details and security for this folder hierarchy.
Search Content	Click to access the Maintain Content page to access and maintain the properties for the content that you have privileges to view. See Using Other Methods for Accessing Folders and Content.

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Field or Control	***Description***
ID	Displays the content IDs that exist in the selected content folder.
Title	Click the content title link to view the content details.

Field or Control	*Description*
Modified	Displays the date when the content was last modified.
Modified By	Displays the user ID who last modified the content.
Properties	Click to access the content properties page to view or edit property details for this content.
Delete	Click to delete the associated content.

Searching for Folders and Content

This section discusses search methods for folders and content.

Understanding Search Functions and Menus

In the content management system, users can use a number of functions and menu items to search for folders and content:

- *Search Folders* (or *Search Sections)*

  Enables users to search for folders by folder title, folder ID, parent ID, or by last item added.

- *Search Content*

  Enables users to use the search index to search for content using keywords.

  You can search for items within content management in two ways:

  - Using the Search field in Global Search in the portal header.

    The Content search group allows you to search for published content within the entire content management. The Content Archived search group allows you to search within archived content.

    The facet feature on the search results page shows the published location of a content. If the content is published in multiple features, the search results display all the features that the content is published in.

  - Using the Search Content link on pages within Content Management.

    The Search Content Management page allows you to search within the current folder or across all folders and portals and it will display unpublished content as well.

- *Maintain Content*

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Enables users to search for content by content title, content ID, content type, parent ID, date added, and inactive date.

Pages Used to Search for Folders and Content

Page Name	***Definition Name***	***Usage***
Search Folders Page	EPPCM_HIERARCHY	Used to locate a folder in the content management system. This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.
Search Content Management Page	EPPSR_SEARCH	Used to search for content, including unpublished content, within the current folder or across all folders and portals.
Global Search	PTSF_GLOBAL_SEARCH	Used to search for published content within the entire content management system.

Search Folders Page

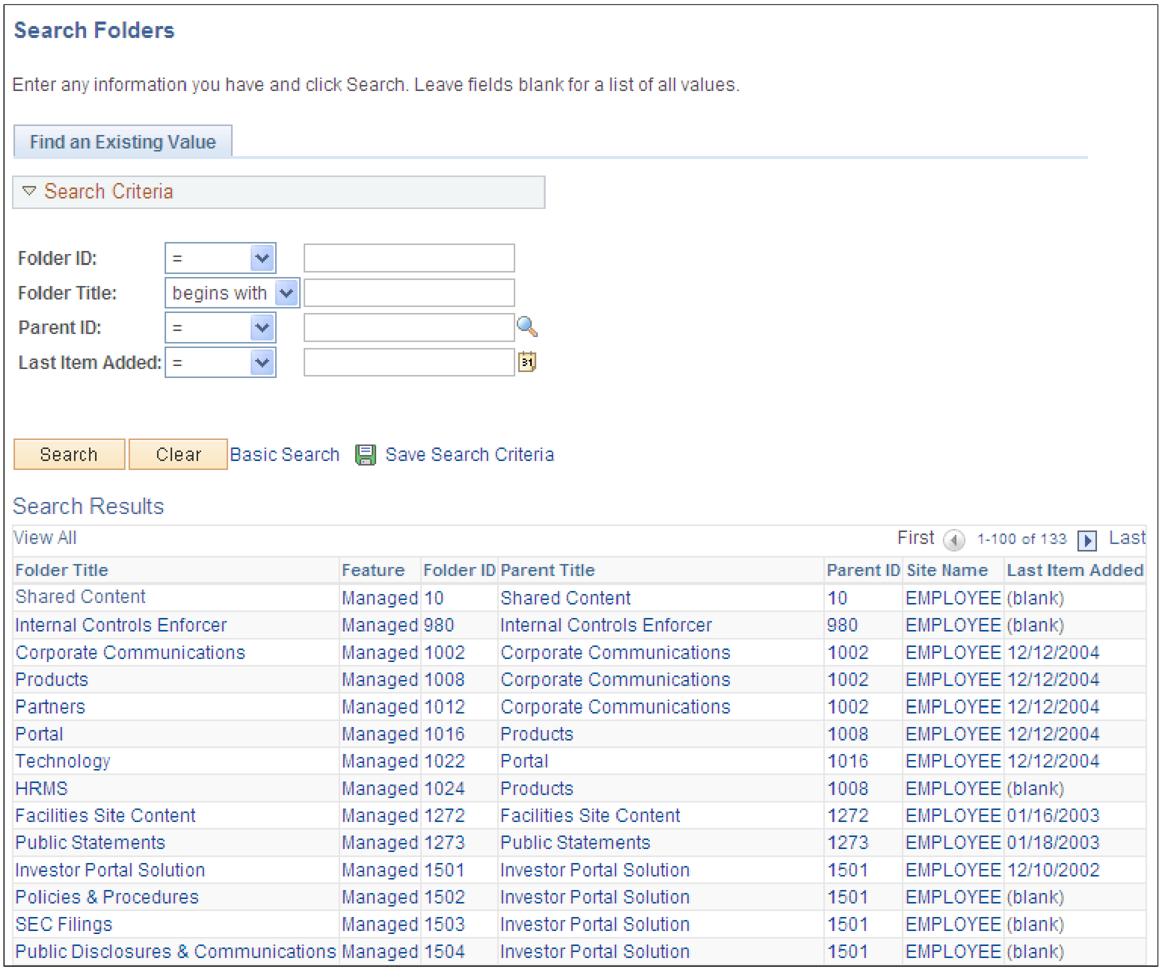
Use the Search Folders page (EPPCM_HIERARCHY) to locate a folder in the content management system.

This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.

Navigation:

Content Management, Managed Content, Search Folders

This example illustrates the fields and controls on the Search Folders page.



Use the Search Folders page to locate a folder in the content management system. This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.

Search Content Management Page

Use the Search Content Management page (EPPSR_SEARCH) to search for content within the current folder or across all folders and portals.

Navigation:

Click the Search Content link on the Browse Managed Content page.

Click the Search Content link on the Browse Categorized Content page.

Click the Search Content link on the Browse News Publications page.

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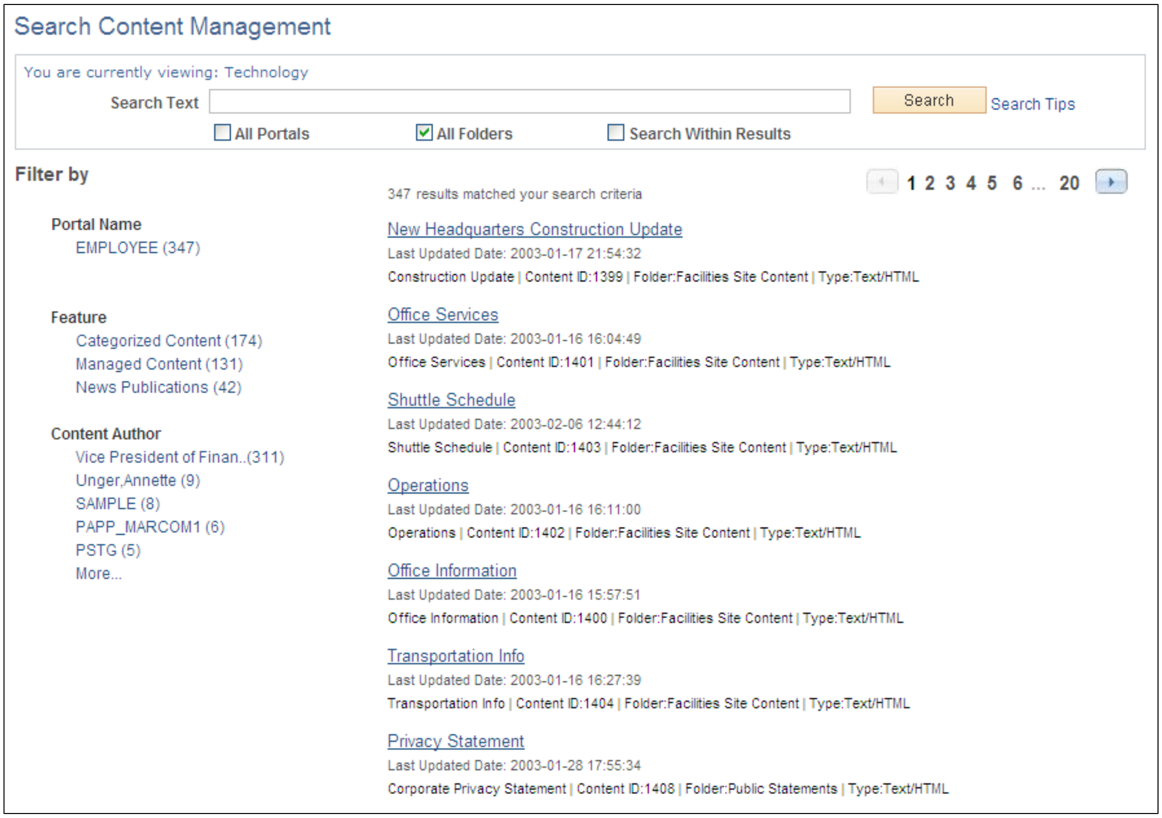
This example illustrates the fields and controls on the Search Content Management page. You can find definitions for the fields and controls later on this page.



Use the Search Content Management page to search for content within the current folder or across all folders and portals. By default, the initial search displays search results of the current folder.

Field or Control	***Description***
Search Text	Enter the search criteria. **Note:** Do not use blank or * (asterisk); these are not valid search criteria.
Search Tips	Click to display search syntax and examples on the Search Tips page.
All Portals	Select to search within all portals.
All Folders	Select to search within all folders.
Search Within Results	Select to search within the search results.
Search	Click to perform the search.

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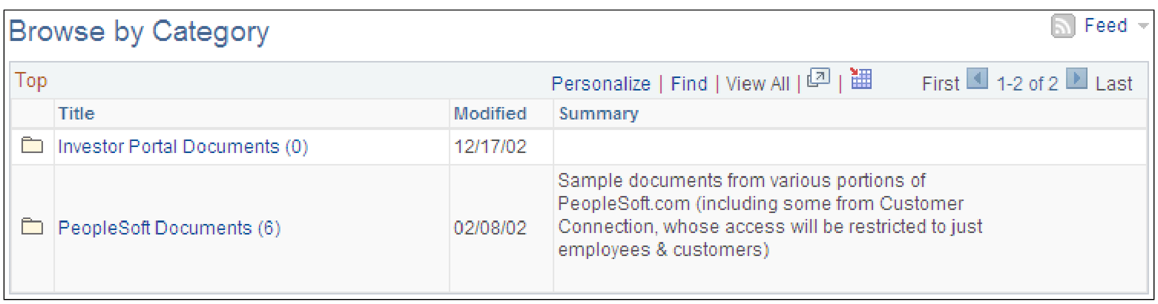
Field or Control	*Description*
Filter by	This is the facet pane, which is the area to the left of the search results. Use the facets to filter the search results and drill down closer to the desired information. *Portal Name* — Select a portal to filter the search by the selected portal. *Feature* — Select a feature to filter the search by the selected feature. The feature facet relates to the origin of the content. The available features are Categorized Content, Managed Content, and News Publications. *Content Author* — Select an author to filter the search by the selected author.
Return to <Folder>	If the search originated from a particular folder, click to return to that folder.

Browsing Published Categorized Content

This section discusses how to browse by category.

Access the Browse by Category page (EPPCM_BRWS_MAIN) (select **My Content** > **Browse by Category from the main menu; click a title link).**

This example illustrates the fields and controls on the Browse by Category page.



Use this page to browse and view published categorized content outside of the Content Management system. The system displays published content to users with viewer roles for the parent folder where the content is located. The system does not display unpublished categorized content.

Click the folder item title to drill down through the hierarchy. Use the navigation path to navigate to the parent folders. Click the title of the content item to view the content.

Viewing a Content Folder in a Pagelet

This section discusses how to view a content folder in a pagelet.

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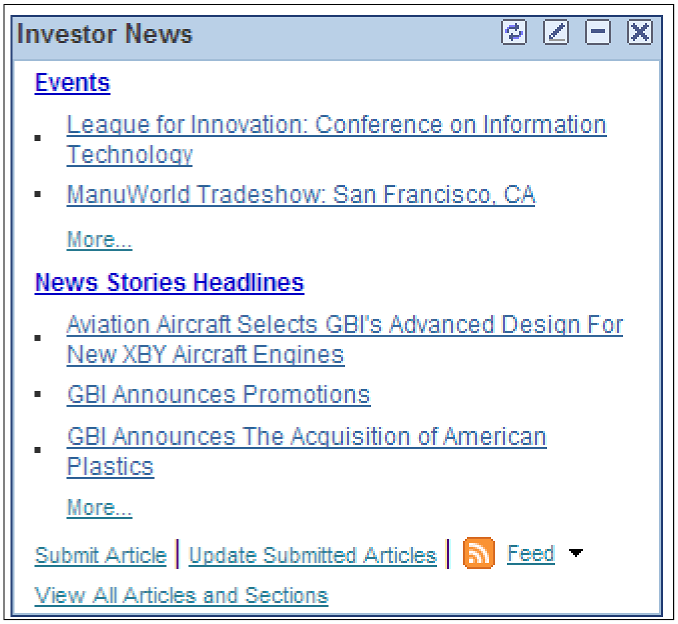
Access the Investor News pagelet (click the **Content** link from the menu bar on the homepage and then select any news publication option in the Personalize Content page).

This example illustrates the fields and controls on the Investor News pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
<News title links>	Click to access the News Publication Details page, where you can view the details of each news.
Submit Article	Click to access the Add News Articles page, where you can specify the type of content you want to add to a folder in managed content. See Submit News Articles - Add News Article Page.
Update Submitted Articles	Click to access the Submit News Articles page, where you can view basic information about the articles within a section and drill down to article details. Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles. See Submit News Articles - Add News Article Page.
Feed	Click to open the feed for this publication, if available. See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).

Field or Control	Description
View All Articles and Sections	Click to access the View All Articles and Sections page where you can view all active articles and sections of the selected news publication pagelet. See View All Articles and Sections Page.

Viewing Content Using the View Published Content WorkCenter Page

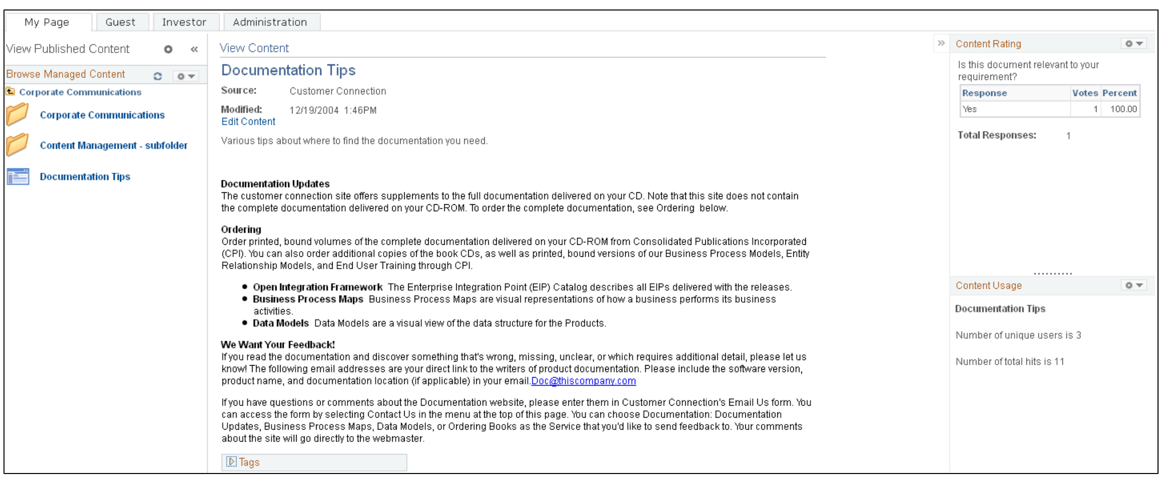
This section discusses how to use the View Published Content WorkCenter page.

If the **Enable Content in WorkCenter** check box is selected on the Installation Options page, when you access published content by browsing content folders, viewing search results, or using a content pagelet on your home page, the content appears in the View Published Content WorkCenter page. This applies to managed content and categorized content.

Note: WorkCenter pages require PeopleTools 8.52 or higher.

This example shows the View Published Content WorkCenter page.

This example illustrates the fields and controls on the View Published Content WorkCenter page. You can find definitions for the fields and controls later on this page.



See the product documentation for *PeopleSoft Interaction Hub: Using Portal Features* and *PeopleTools: Applications User's Guide*, "Using PeopleSoft Application Pages."

Browse Managed Content

Use this pagelet to navigate to other published content within the folder hierarchy of the managed content item.

Click the icons to traverse the folders. Click a document to view it in the main content area.

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Related Content

Use the **Content Rating** pagelet to respond to or review results of the poll questions for the content item.

Use the **Content Usage** pagelet to review the number of unique users that have accessed the content item and the total number of times the content item has been viewed.

Related Links

Configuring Content Display in a WorkCenter

Using Other Methods for Accessing Folders and Content

This section discusses how to access folders and content using methods other than the methods already discussed.

You can access folders and content within hierarchies through the standard portal search using the **Search Folders** and **Maintain Content** functions. These functions are common to the Content Management features. The user sees only content for which he or she has viewer rights, regardless of expiration dates, which enables a user to search through existing content.

These are the types of left navigation links used to access folders and content:

- *Search Folders:* Search for Content Management folders that you have privileges to view, and access the children that are associated with the selected folders.
- *Maintain Content:* Access and maintain the properties for the Content Management content that you have privileges to view.
- *Search All Folders:* Search for a folder in all features and sites that you have privileges to view.

  Access the children that are associated with the selected folder.
- *Maintain All Folders:* Search for a folder in all features and sites that you have privileges to view.

  Maintain the properties for the selected folders.
- *Maintain All Content:* Search for content in all features and sites that you have privileges to view.

  Maintain the properties for the content that is stored in the Content Management system.

Note: The same content item may be listed multiple times because a single content item can be shared across multiple hierarchies, features, and sites.

Related Links

Browsing All Folders

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Chapter 4

Setting Up and Working With Managed Content

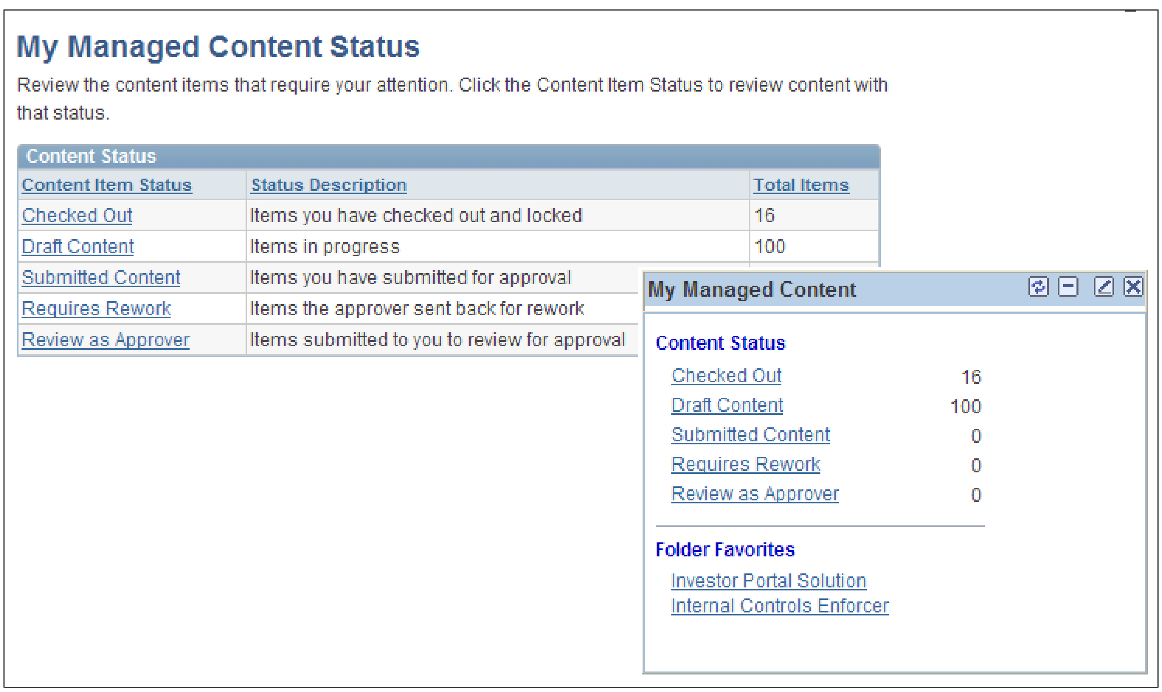
Understanding Managed Content

In Oracle's PeopleSoft Interaction hub, the Managed Content feature of the Content Management system enables you to manage the development of content. Managed content serves as a proving ground for new content that is to be used in the portal. The system assigns a status to each piece of content based on where the content is in the process flow and what action the user performs.

The Managed Content feature enables you to create content, manage it collaboratively in folders, check content in and out, create new versions of content, and make approved content available to other content management features, such as news publications, content categorization, collaborative workspaces, related information pagelets, and others.

This example shows the My Managed Content Status page (My Content, My Migrate Content) plus an inset of the My Managed Content pagelet listing the number of content items that require your attention by status:

This example illustrates the fields and controls on the My Managed Content Status page and an inset of the My Managed Content pagelet.



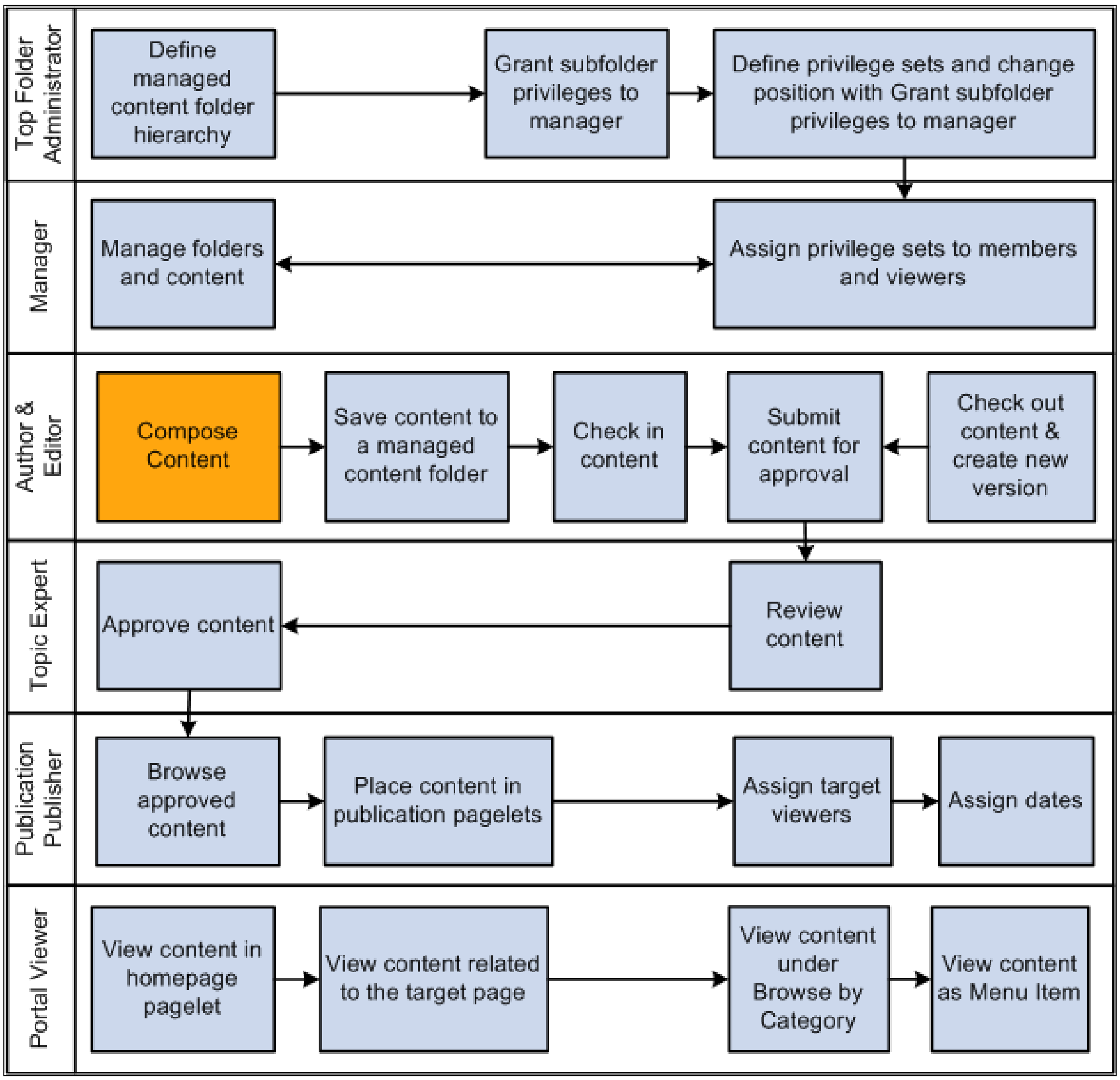
Process of Creating Managed Content

The Managed Content feature offers a proving ground for new content that is to be used in the portal.

This feature enables you to create content, manage it collaboratively in folders, check content in and out, create new versions of content, and make approved content available to other content management features, such as News Publications, Content Categorization, and more.

The system assigns a status to each piece of content based on where content is in the process flow and what action the user performs.

This flowchart illustrates the Content Management Managed Content process and the roles involved in each step.



Checking Content In and Out

When you add new content to a Managed Content folder, it is automatically locked and checked out to you. Checking in content releases the lock so that other authorized folder members can check out and edit the content. Each time the content is checked out, it creates a new version. The system assigns new versions a status of *Draft,* while old versions maintain their previous status. Members can access previous

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versions, but the current checked out version is locked and only accessible to the user who checked out the content.

Note: New versions are based on whichever old version was checked out. If four versions exist and you check out the latest version, version five will be based on version four. However, if you check out version two, version five will be based on that version. The current version is always indicated on the Content Properties page.
If content is being translated into one or more languages, perform the language translations on the content after the content is checked out. When all translations are completed, you can check content in.

See Translating Content Management HTML/Text Content.

Canceling Check Out

Content that is checked out is locked to a given user. Canceling the check out causes different behaviors depending on the status of the last version of the content that is checked out:

- If only one version exists, canceling the check out unlocks the content.
- If the checked out version is submitted for approval, canceling the check out unlocks the content and sets the version status back to *Draft.*
- If the checked out version is at draft status and more than one version exists, canceling the check out deletes the last version.

Submitting Content for Approval

After the content is completed, the author or reviewer submits it for approval. The system assigns the submitted content a status of *Pending Approval*and automatically checks it out to the approver. The current version becomes locked and accessible only to the approver.

The approver can either approve the content or return it to the submitter for rework.

When the content is approved, the system assigns the content a status of *Approved.* This content can be selected by a publication if it is in a folder that allows content to be published. Users can still check out and edit the content. This check-out creates a new version, leaving the approved version intact and usable by publishing features if it is in a publishable folder.

If content is returned for rework, the system assigns the status *Requires Rework* and unlocks it.

Managing Folders

This topic discusses ways to maintain folder properties for managed content, update folder security, assign member privileges and publish afolder as feed or menu item.

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Pages Used to Manage Folders

Page Name	***Definition Name***	***Usage***
Folder Properties Page	EPPCM_CATG_MAIN	Used to set the properties for a new folder or to update property details for an existing folder. Used for top folders as well as for subfolders.
Folder Security Page	EPPCM_CATG_MEM	Used to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.
Folder Security - Set Members Privileges Page	EPPCM_CATG_PRIV	Assign privilege sets to the selected members.
Top Folder Properties - Move Folder Page	EPPCM_CATG_TREEMOD	Used to change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature. This option is only available for Managed Content, Categorized Content, and Workspaces.
Folder Properties - Publish as Menu Item Page	EPPCM_CATG_CREF	Publish a folder in the Content Management system so that it is accessible as a link in the left navigation menu.
Top Folder Properties - Advanced Feed Options Page	EPPCM_FEED_ADVOPT	Set up advanced options to publish a folder in the content management system so that it is accessible as a feed. The **Publish as Feed** link is available on all folder properties pages if the folder can be published and you have permissions to publish the folder.

Folder Properties Page

Use the Folder Properties page (EPPCM_CATG_MAIN) to used to set the properties for a new folder or to update property details for an existing folder.

Navigation:

- **Content Management** > **Managed Content** > **Browse Folders**

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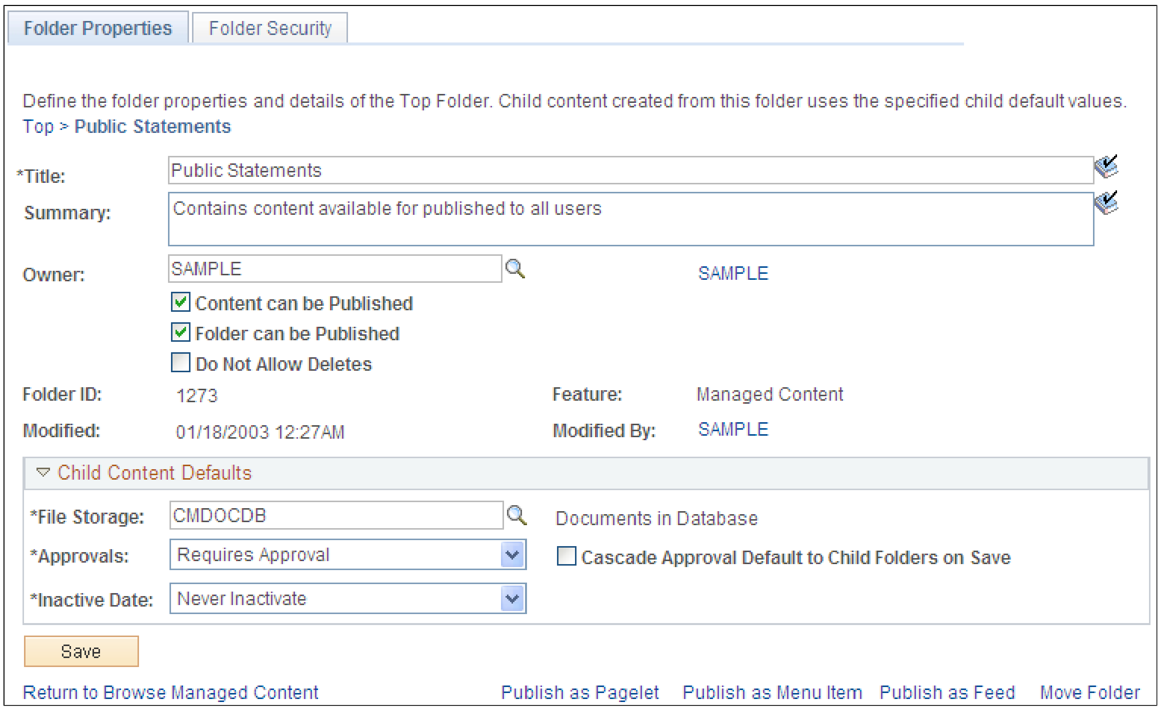
Click the **Properties** link on the Browse Managed Content page.

- Navigate through the hierarchy to the desired level. Click the **Add Folder** button on the Browse Managed Content page.
- Navigate through the hierarchy. Click the appropriate **Properties** link on the Browse Managed Content page.

This example illustrates the fields and controls on the Folder Properties page. You can find definitions for the fields and controls later on this page.



Users can add folders or update properties at any level for which they have authorization. Only top administrators can create or update top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders or update properties.

Field or Control	***Description***
Title	Enter the desired information into the **Title** field.
Summary	Add a brief description of the content. This field supports HTML entries.
Owner	Assign the owner of the folder. Click the name link of owner to access the Instant Message page, where you can send a instant message to the owner.

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Field or Control	*Description*
Content can be Published	Select this option to enable approved content to be imported and published in features outside of managed content. You must select this option for publishing features to import or reference managed content. **Note:** If you want approved content to remain private, you can create a development or work-in-progress folder that is nonpublishable. As content is completed and approved, you can then add a new publishable folder location for the content. The development folder should have only publishing and viewing members. See Content Locations Page.
Folder can be Published	Select this check box to allow for publishing of this folder as a pagelet or menu item. **Note:** Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the **Publish as Pagelet, Publish as Feed,** and **Publish as Menu Item** links.
Do Not Allow Deletes	Select this option to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.
Folder ID	Displays the ID of the folder.
Feature	Displays the features to which the folder belongs.
Modified	Displays the date when the folder was last modified.
Modified By	Displays the user ID who last modified the folder.
Return to Browse Managed Content	After you have completed creating a top folder in the managed content feature, click this link to return to the Browse Managed Content page. The folder that you created now appears as a top folder in the managed content feature.

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Field or Control	*Description*
Publish as Pagelet	Click this link to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet. **Note:** This link is available only when the **Folder can be Published** option is selected. See Folder Properties - Publish Pagelet Wizard Definition Page.
Publish as Menu Item	Click this link to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it is accessible as a link in the left navigation menu. **Note:** This link is available only when the **Folder can be Published** option is selected. See Folder Properties - Publish as Menu Item Page.
Publish as Feed	Click this link to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed. **Note:** This link is available only when the **Folder can be Published** option is selected. See Top Folder Properties - Advanced Feed Options Page.
Move Folder	Click this link to access the Top Folder Properties - Move Folder page, where you can change the location of this folder. See Top Folder Properties - Move Folder Page.

Child Content Defaults

Child content created from this folder uses the default values specified here.

Field or Control	*Description*
File Storage	Select the document storage location for the folder's child content. The value appears by default from entries set up for attachment locations. As delivered, two locations are set up: one for storage of attachments in a database table; and another as a file server placeholder. The file server choice will not function properly until you edit the URL entry with your server information. The database storage choice functions for the underlying database table that exists within the PeopleSoft Interaction hub. See File Storage Page.
Approvals	The **Approvals** field determines the approval mode for the folder: • *Requires Approval:* All content in the folder must be approved. • *Auto-Approved:* The system automatically marks content as approved. • *Optional Approval:* As content is being created, content authors have the option to require approval or to have the content automatically approved. **Note:** This setting cannot be changed after content has been created. If you need to change the approval setting, you must delete the content and add it back in with the new approval setting.
Cascade Approval Default to Child Folders on Save	Select to set the default approvals for all new content in child folders. The approval settings are transferred to all child folders when you save the page. This setting does not affect existing child content approval settings.

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Field or Control	*Description*
Inactivate Date	Select the default inactivation date for content created in this folder. Content with an archive date previous to the current date does not show in the content list in the Browse Content or My Content pages. However, the content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. Publishing features such as News Publication and Categorized Content use the expiration date to control when the content no longer appears. Available options are: • *Current Date.* • *Current Date + 1 Week.* • *Current Date + 30 Days.* • *Current Date + 90 Days.* • *Current Date + 365 Days.* • *Current Date + 999 Days.* • *Never Archive.*

Related Links

Browsing Folder Hierarchies

Folder Security Page

Access the Folder Security page (select **Content Management** > **Managed Content** > **Browse Folders;** click the **Add Top Folder** button; and select the Folder Security tab on the Folder Properties page).

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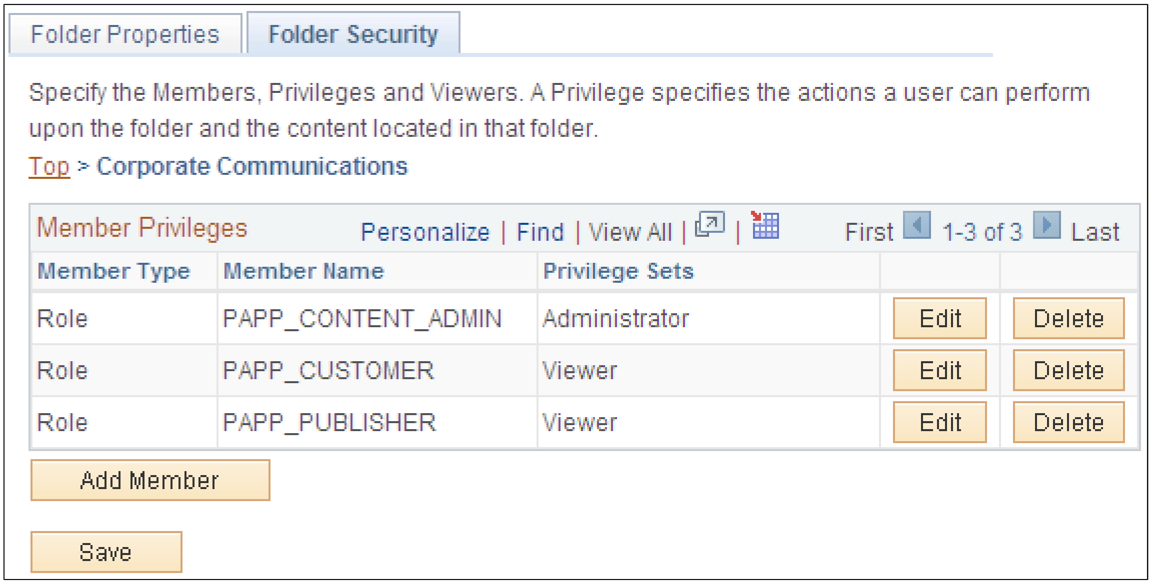
This example illustrates the fields and controls on the Folder Security page. You can find definitions for the fields and controls later on this page.



Use this page to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.

A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

Note: A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member in a folder. Privileges specify the actions a member can perform upon the folder and the content located in that folder.

Field or Control	***Description***
Member Type	Displays the membership type of *User* or *Role* for each member.
Member Name	Displays a membership name for each member.
Privilege Set	Displays the privilege set of each member.
Edit	Click to edit the privileges of this member.
Delete	Click to remove the member and prohibit them from accessing content from this folder.

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Field or Control	*Description*
Add Member	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform upon the folder and the content located in that folder.
Inherit Members	Click to inherit the members assigned to the parent folder. **Note:** This button will not available if this folder is a top folder.

Folder Security - Set Members Privileges Page

Use the Folder Security - Set Members Privileges page (EPPCM_CATG_PRIV) to assign privilege sets to the selected members.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click the **Properties** link on the Browse Managed Content page.

Select the Folder Security tab. Click the **Add Member** or the **Edit** button.

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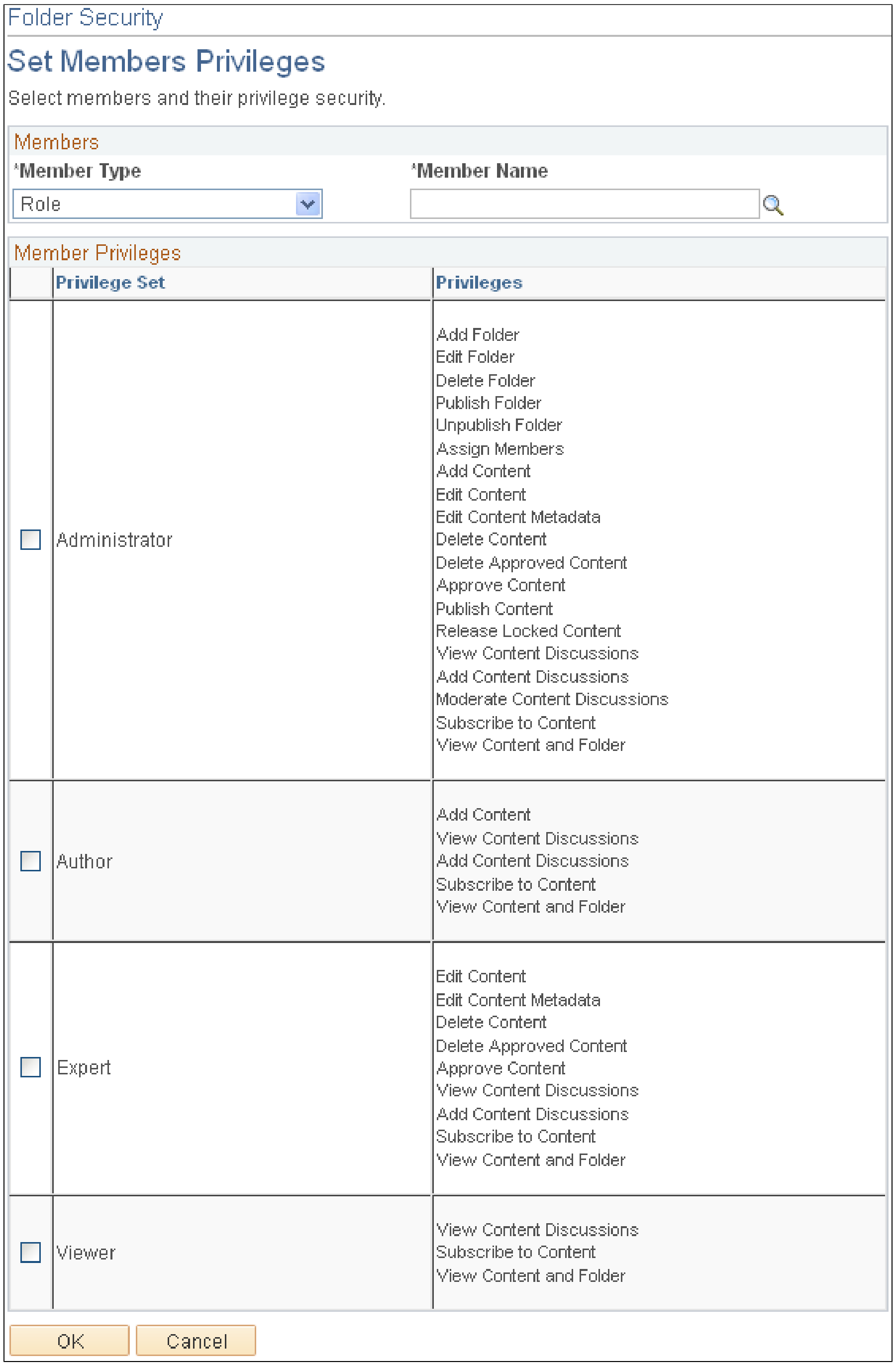
This example illustrates the fields and controls on the Folder Security - Set Members Privileges page.



Field or Control	***Description***
Member Type	Select a membership type of *User* or *Role,* and then select the member.
Member Name	Select or enter the desired information into the **Member Name** field.

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Field or Control	***Description***
Privilege Set	Assign privileges to this member by selecting privilege sets.
Privileges	Displays the privilege sets that were defined for the Manage Content feature.
OK	Click this button to accept changes on the privilege sets and return to the Folder Security page.

Note: The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Managed Content feature.

Related Links

Privilege Sets Page

Top Folder Properties - Move Folder Page

Use the Folder Properties - Move Folder page (EPPCM_CATG_TREEMOD) to used to change the location of a subfolder.

If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click the **Add Top Folder** button, and click the **Move Folder** link on the Folder Properties page.

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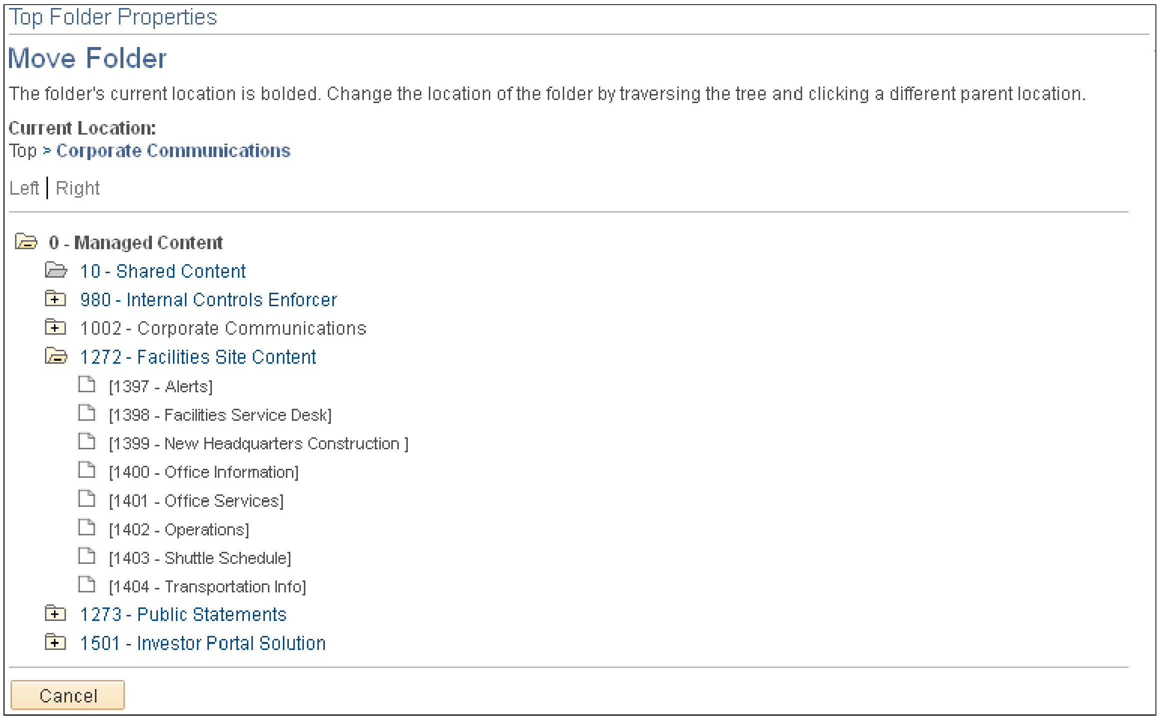
This example illustrates the fields and controls on the Top Folder Properties - Move Folder page.



Use this page to change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature, or vice versa.

The folder in bold type represents the current parent location. To move a folder to a top folder position, select the *0-Managed Content* location.

Navigate the tree by clicking the folder icons and selecting a folder from the available values. The available values depend on your privileges. You must have the proper privileges to relocate to a new location—for example, you must have the *Delete Folder* privilege in the current location and the *Add Folder* privilege in the new location.

After you make the move, notice the locator links that indicate that the folder is now in a new location.

Folder Properties - Publish as Menu Item Page

Use the Folder Properties - Publish as Menu Item page (EPPCM_CATG_CREF) to publish a folder in the Content Management system so that it is accessible as a link in the left navigation menu.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click the **Add Top Folder** button on the Browse Managed Content page.

Click the **Publish as Menu Item** link on the Folder Properties page.

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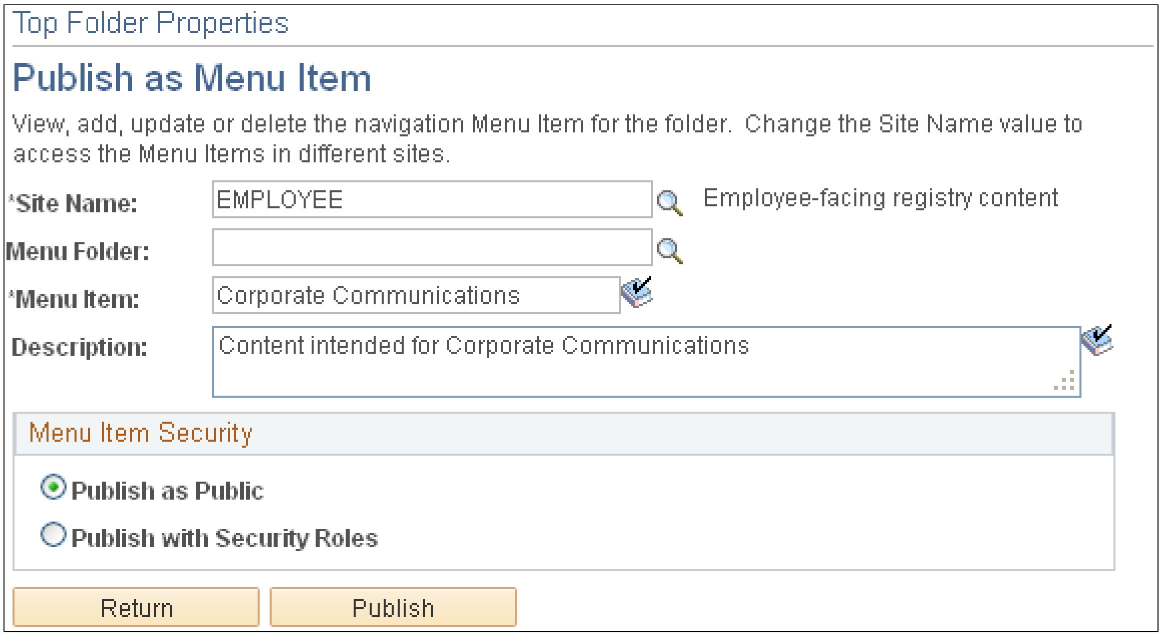
This example illustrates the fields and controls on the Folder Properties - Publish as Menu Item page.



Field or Control	*Description*
Site Name	Select the portal or site of the managed content that is being published.
Menu Folder	Select a folder to publish to. Only folders from the current site are available to select.
Menu Item	Enter the menu item title that will identify the menu item.
Description	Enter a meaningful description for this menu item.
Menu Item Security	Select the security options for viewing the menu item. Available options are: • *Publish as Public*, which enables all users to view the menu item. • *Publish with Security Roles*, which uses the roles defined on the Folder Security page when publishing the menu item. If you select this option, only defined roles are used to assign viewing privileges. If you add a user to the Folder Security page, that user will not have privileges to view the published menu item or published content unless that user also has one or more of the listed roles. **Note:** If no roles are defined on the Folder Security page, the system automatically selects to publish the menu item as *Public*.

Field or Control	***Description***
Publish	Click to save and publish this content item. Published content appears on the Browse by Category page to users who have the viewer roles for the parent folder where the content is located.

Top Folder Properties - Advanced Feed Options Page

Use the Folder Properties - Advanced Feed Options page (EPPCM_FEED_ADVOPT) to set up advanced options to publish a folder in the content management system so that it is accessible as a feed.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

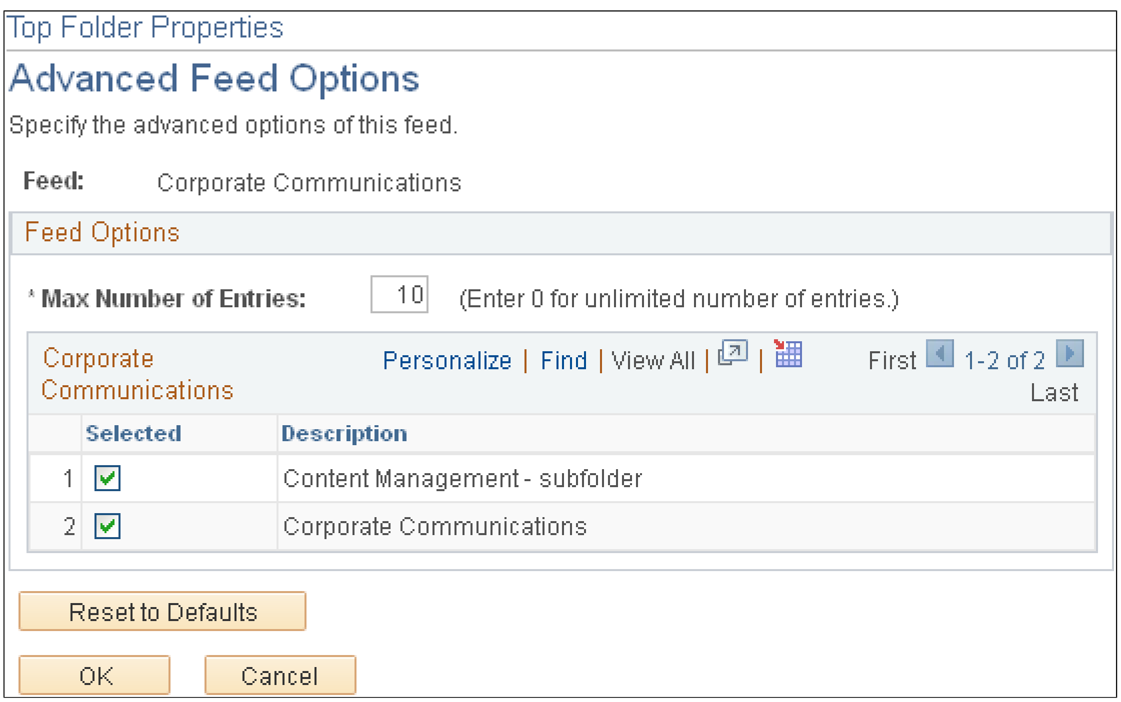
Click the **Add Top Folder** button, and click the **Publish as Feed** link.

Click the **Edit** or **Add Feed** button.

Click the **Advanced Option** link.

Note: You can also publish subfolder if its publishing property is set to *Folder can be Published.*

This example illustrates the fields and controls on the Top Folder Properties - Advanced Feed Options page.



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Field or Control	Description
Max Number of Entries	Specify the maximum number of feed entries that you want to display in the feed document.
Selected	Select appropriate folders to publish as feeds.
Reset to Defaults	Click to reset all parameters: **Max Number of Entries** is back to *10,* and sub-folder is *selected.*
OK	Click to return to the Folder Properties - Publish as Menu Item page, and then click the **Publish** button to save and publish this content item as feed.

Note: See the Using Portal Features PeopleBook for how to view a list of feeds, define feed definition, and publish feed to site.

See “Publishing PeopleSoft Interaction Hub Content as a Feed” (Using Portal Features).

Publishing a Folder or Content Item as a Pagelet

This section discusses how to:

- Publish a pagelet from a folder or content item.
- Publish a folder or content item from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Note: When a content item is published as a pagelet, the Edit Content link displayed in the published pagelet will redirect the user to edit the content in the portal or site where the content resides, and not to the portal or site where the pagelet is displayed.

Folder Properties - Publish Pagelet Wizard Definition Page

Access the Folder Properties - Publish Pagelet Wizard Definition page (select **Content Management** > **Managed Content** > **Publish as Pagelet** or **Content Management** > **Managed Content** > **Browse Folders;** click the **Properties** link; click the **Publish as Pagelet** link on the Folders Properties page).

Access the Text or HTML Properties - Publish Pagelet Wizard Definition page (select **Content Management** > **Managed Content** > **Browse Folders;** click the link for a folder to browse the folder hierarchy; click the **Properties** link; click the **Publish as Pagelet** link on the Text or HTML Properties page).

Access the File Attachment Properties - Publish Pagelet Wizard Definition page (select **Content Management** > **Managed Content** > **Browse Folders;** click the link for a folder to browse the folder

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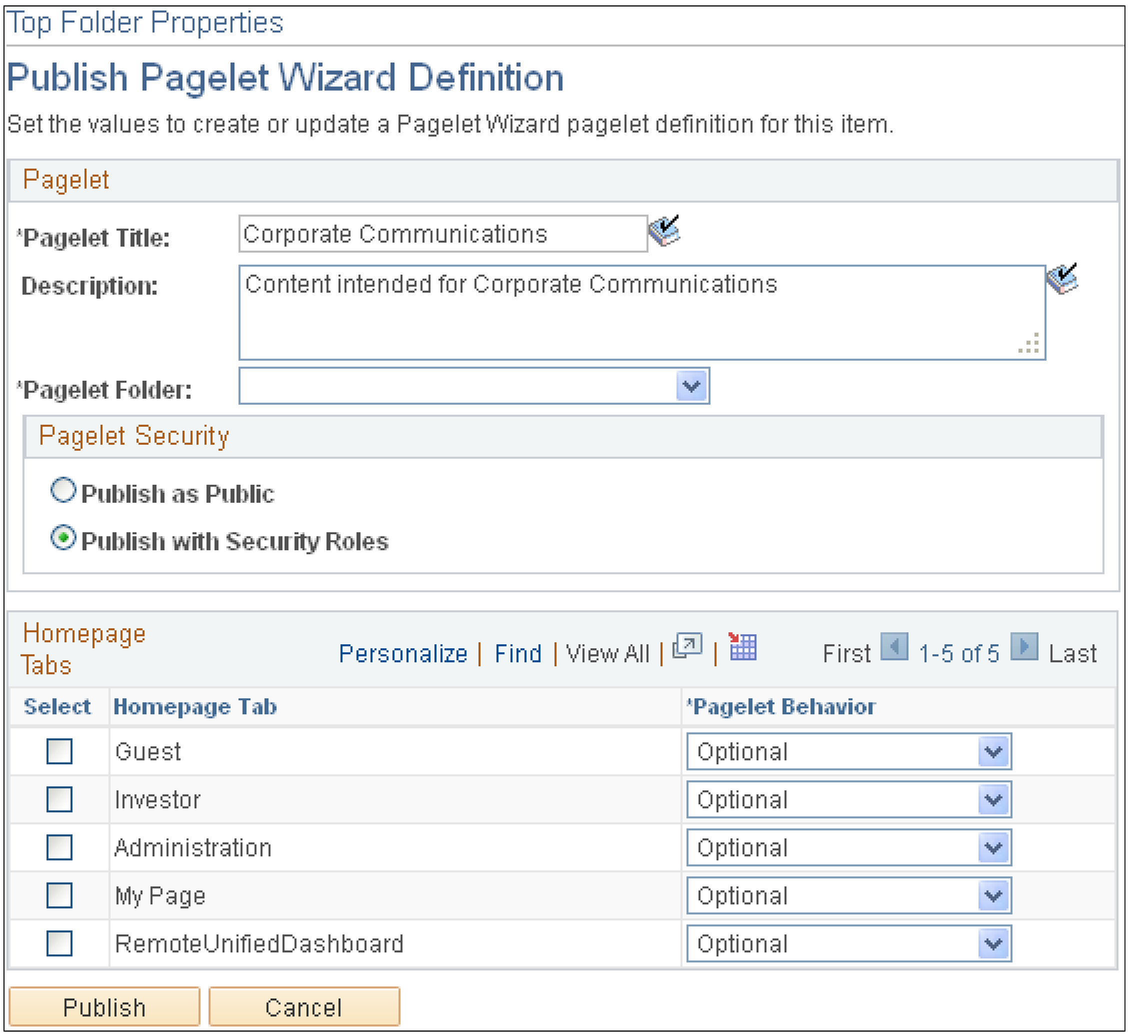
hierarchy; click the **Properties** link; click the **Publish as Pagelet** link on the File Attachment Properties page).

Access the Web Site URL Properties - Publish Pagelet Wizard Definition page (select **Content Management** > **Managed Content** > **Browse Folders;** click the link for a folder to browse the folder hierarchy; click the **Properties** link; click the **Publish as Pagelet** link on the Web Site URL Properties page).

The following example demonstrates publishing a folder as a pagelet.

This example illustrates the fields and controls on the Folders Properties - Publish Pagelet Wizard Definition page.



Note: The Folder Properties - Publish Pagelet Wizard Definition page is displayed when a folder has never been published as a pagelet. The Folders Properties - Publish as Pagelet page is displayed after a folder has been published as a pagelet.

Pagelet

The pagelet title and description from the Folder Properties page appear in the pagelet section. You may edit these two fields as necessary.

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Field or Control	***Description***
Pagelet Title	Enter the pagelet title that will identify the pagelet.
Description	Enter a meaningful description for this pagelet.
Pagelet Folder	Select a folder to publish to. Only folders from the current site are available to select.
Pagelet Security	Select the security options for viewing the pagelet. The available options are: • *Publish as Public*, which enables all users to view the pagelet. **Note:** When publishing a content item as a pagelet, this is the only available option and it is selected by default. • *Publish with Security Roles*, which uses the roles defined on the Folder Security page when publishing the pagelet. **Note:** If no roles are defined on the Folder Security page, the system automatically selects to publish the pagelet as *Public*.

Homepage Tabs

Use the Homepage Tabs section to define the homepage tab labels and behavior for the pagelet.

Field or Control	***Description***
Homepage Tab	Select the tabs that will display the pagelet.

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Field or Control	*Description*
Pagelet Behavior	Select the behavior options for the pagelet. The available options are: • *Optional* The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges. • *Optional-Default* The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges. • *Required-Fixed* The pagelet will appear on all user homepages if users have access to the pagelet. The placement of the pagelet cannot be changed, and the pagelet cannot be removed from the homepage. • *Required* The pagelet will appear on all user homepages if the user has access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.
Publish	Click to display the Publish as Pagelet page, where you can review or edit the pagelet definition.

Publishing a Folder or Content Item from Pagelet Wizard

Pagelets for a folder or content item can be created and published using Pagelet Wizard and then managed from the properties page for that folder or content item. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.

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- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note: If you access Pagelet Wizard from the **Go to Pagelet Wizard** link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

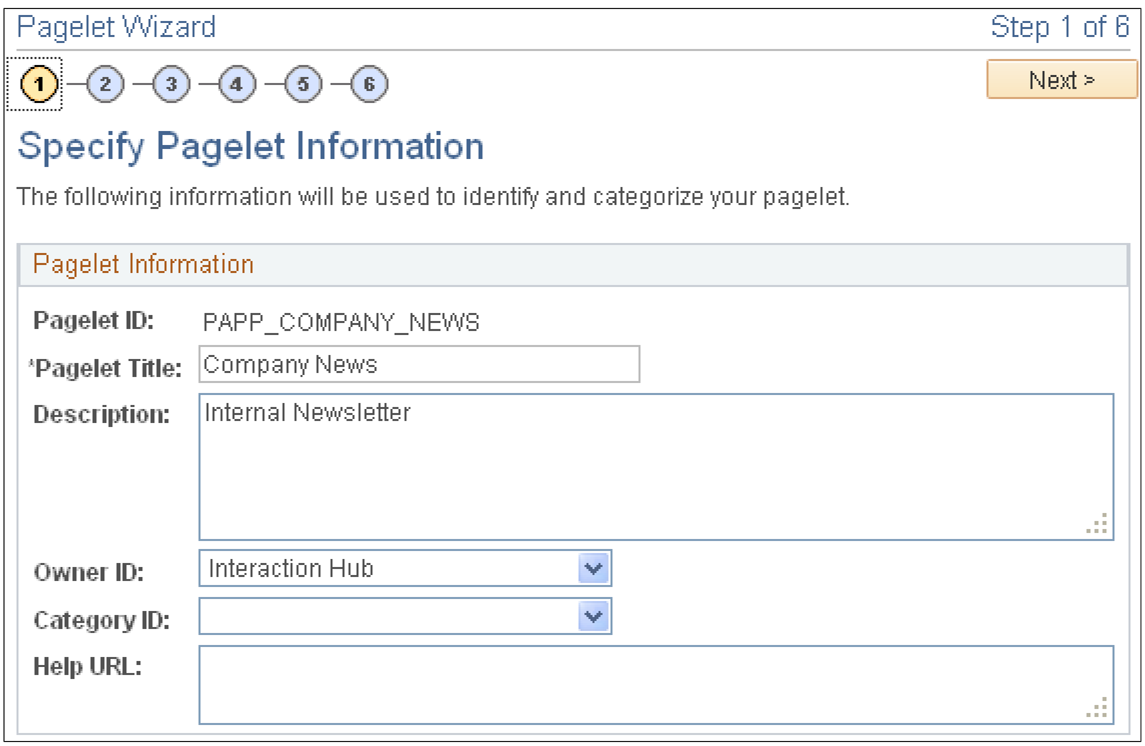
Where appropriate, this section provides details specific to using Pagelet Wizard to publish a folder or content item as a pagelet. The PeopleTools 8.53 PeopleBooks provide detailed information on using Pagelet Wizard.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets.”

Step 1: Pagelet Wizard - Specify Pagelet Information Page

Access the Pagelet Wizard - Specify Pagelet Information page (**Portal Administration** > **Pagelets** > **Pagelet Wizard** > **Pagelet Wizard**; or click the **Go to Pagelet Wizard** link on the folder or content item properties Publish Pagelet Wizard Definition page).

This example illustrates the fields and controls on the Pagelet Wizard - Specify Pagelet Information page.



Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 1: Entering Pagelet Identifying Information.

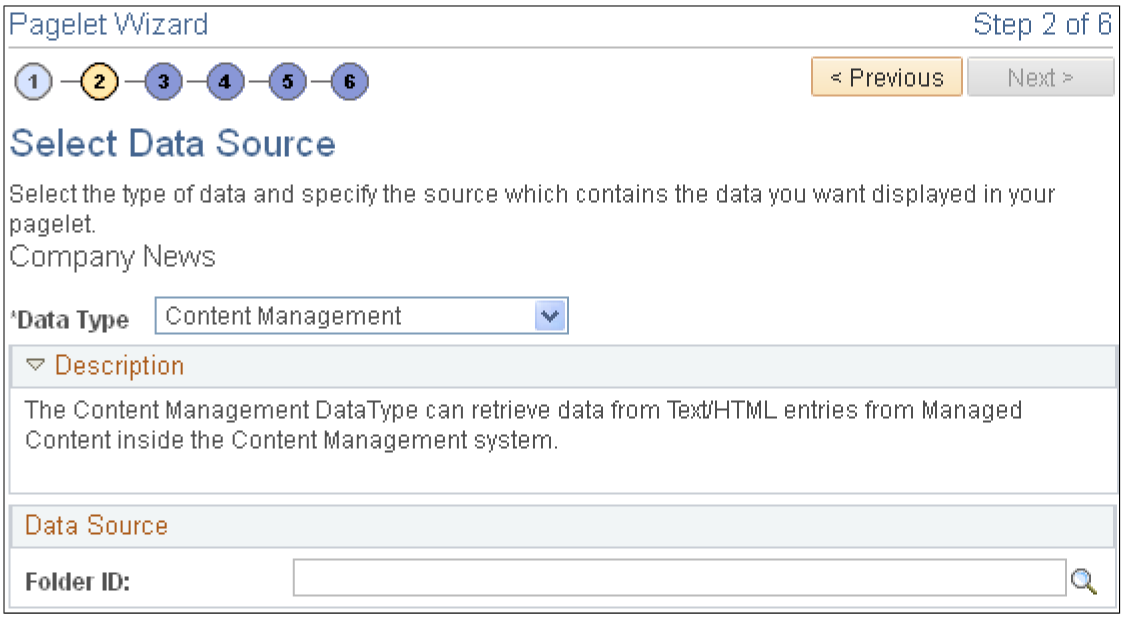
Step 2: Pagelet Wizard - Select Data Source Page

Access the Pagelet Wizard - Select Data Source page (click the **Next** button on the Pagelet Wizard - Specify Pagelet Information page.

Note: The fields that appear on this page depend on the Data Type value that you select.

This example shows Pagelet Wizard - Select Data Source page with *Content Management* data type selected for publishing a content item:

This example illustrates the fields and controls on the Pagelet Wizard - Select Data Source page (content item data type).



Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type and to select the specific content item.

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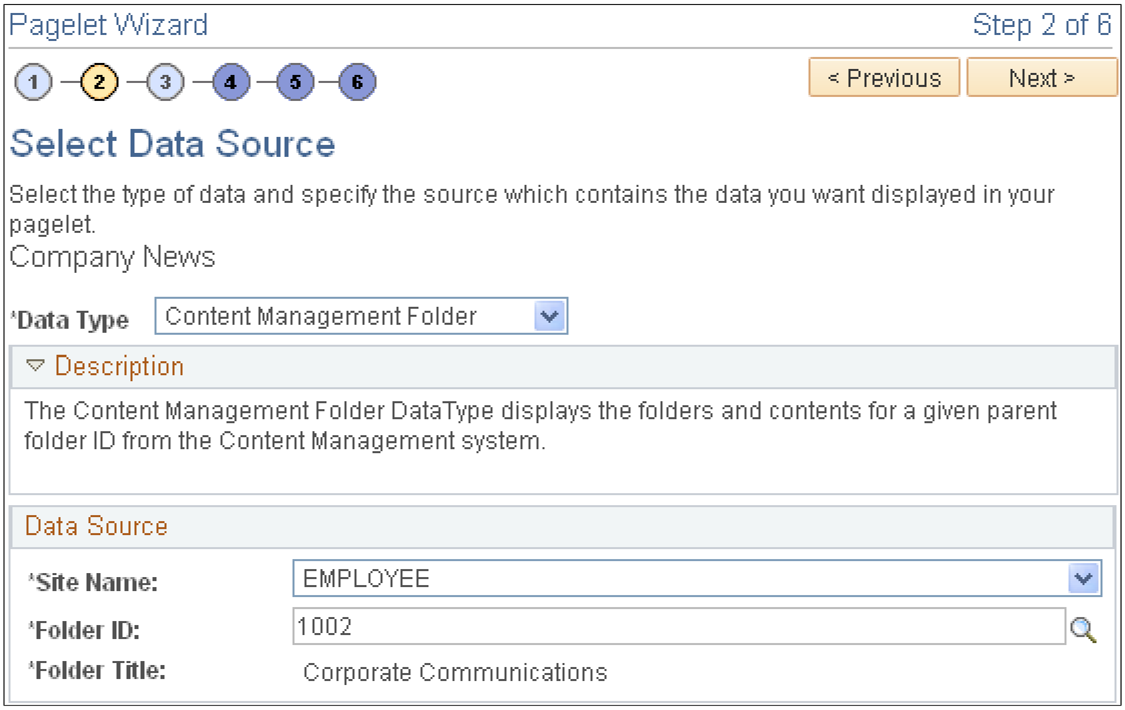
Field or Control	***Description***
Data Type	Use the *Content Management* data type (CMDATASOURCE) to make a Pagelet Wizard pagelet a publishing tool for a single piece of managed content or categorized content that is stored in content management system. If you select the *Content Management* option, these fields appear: **Folder ID, Content ID,** and **Content Path.** **Note:** Approved text or HTML content in the content management system can be used as base data for a Pagelet Wizard pagelet. When you select *Content Management* as the data source, the pagelet does not provide configurable data source parameters. Consequently, when creating a Content Management data source pagelet, you bypass step 3 and proceed to step 4, in which you select the pagelet display format. When the content itself is not well formatted XML, Content Management data source pagelets will not be compatible with the *Custom* display format. See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 2: Selecting a Pagelet Data Type.
Folder ID	Select the parent folder in which the content resides.
Content ID	Select the item of content (managed content or categorized content) that you want to use as the data source for the pagelet.
Content Path	Displays the content management site and folder path to the content.

This example shows Pagelet Wizard - Select Data Source page with *Content Management Folder* data type selected for publishing a folder:

This example illustrates the fields and controls on the Pagelet Wizard - Select Data Source page (content management folder data type). You can find definitions for the fields and controls later on this page.



Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type and to select the specific folder.

Field or Control	***Description***
Data Type	Use the *Content Management Folder* data type (CMFOLDERDATASOURCE) to create a Pagelet Wizard pagelet that displays the content management child items (content and folders) for a given managed content or categorized content folder. If you select the *Content Management Folder* option, these fields appear: **Site Name, Folder ID,** and **Folder Title.** See, *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 2: Selecting a Pagelet Data Type.
Site Name	Select the name of the site you want to use as the source of content for the pagelet.
Folder ID	Select the folder that you want to use as the source of content for the pagelet.
Folder Title	The system displays the name of the folder you've selected.

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See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 2: Selecting a Pagelet Data Type.

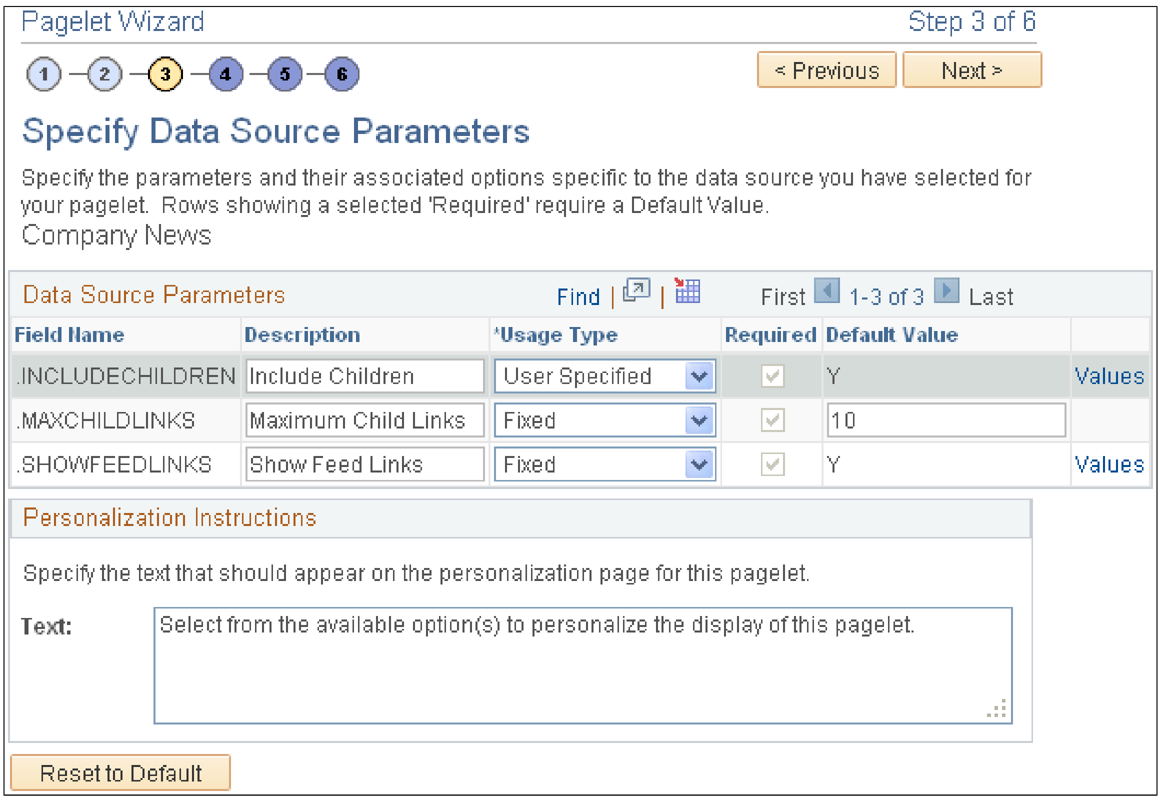
See Understanding Managed Content.

Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Content Management Folder* as the data type on the Pagelet Wizard - Select Data Source page, and click the **Next** button).

Note: The Specify Data Source Parameters page is bypassed and is not accessible when the *Content Management* data type is selected for publishing a content item.

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameters page (folder data source). You can find definitions for the fields and controls later on this page.



Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note: This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field or Control	***Description***
Field Name	Displays the name of the data source parameter. • *.INCLUDECHILDREN:* Determines whether the pagelet displays Navigation Collection child links. • *.MAXCHILDLINKS:* If the pagelet is defined to display child links, determines the maximum number of Navigation Collection child links to display. • *.SHOWFEEDLINKS:* Determines whether the pagelet displays feed links.
Description	Displays a description of the data source parameter.

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Field or Control	***Description***
Usage Type	Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are: • *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the **Configure** link on the published pagelet and select from those parameters for users. • *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field. If you change the usage type from or to *Context Sensitive* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet. • *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify. • *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter. For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the **User** field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet. • *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the **Customize** button appears on the pagelet title bar. End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available. See "Publishing Action Item Pagelet Using the Wizard" (Using Portal Features). If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

Field or Control	***Description***
Required	This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.
Default Value	You can enter a value that includes the % and * wildcards at the beginning or end of a value in the **Default Value** field. Note the following about default values: • If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value. If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field. If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.* • If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the **Look up Value** button to access a list of valid system variables. See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets, ” Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters. • If you select *Fixed* as the usage type, you must enter the fixed value.
Values	If you select *User Specified* or *Admin Specified* as the usage type, click the **Values** link to access the Pagelet Wizard - Specify Data Source Parameter Values page. See “Publishing Action Item Pagelet Using the Wizard” (Using Portal Features).

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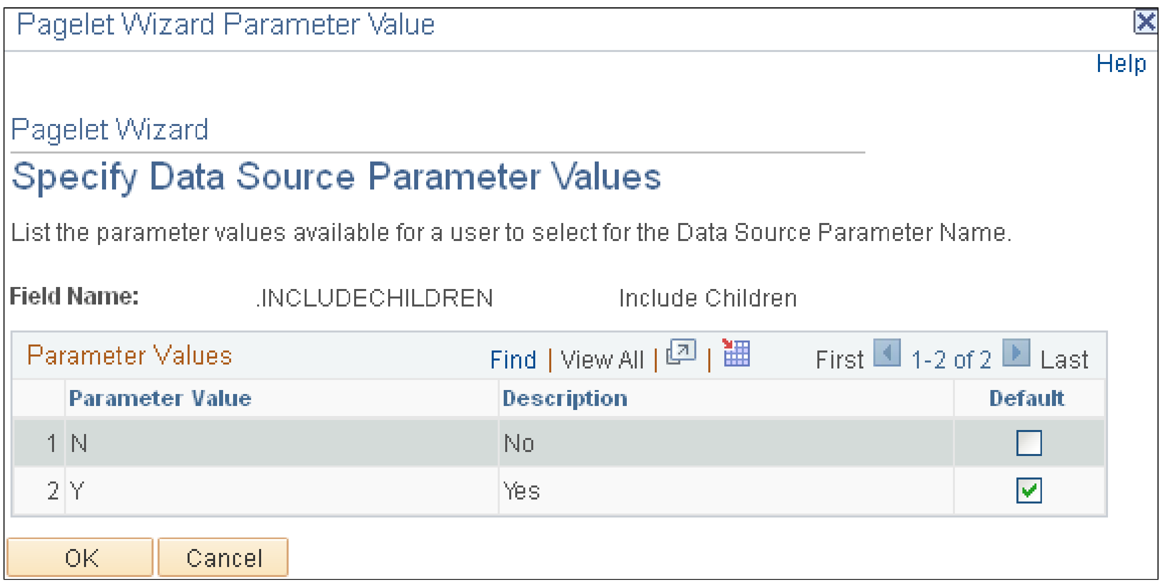
Field or Control	***Description***
Text	Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet. **Note:** Personalization instructions must be translatable.

Specifying Prompt Values for Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the **Values** link on the Pagelet Wizard - Specify Data Source Parameters page).

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameter Values page (folder data source). You can find definitions for the fields and controls later on this page.



Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Field or Control	***Description***
Parameter Value	Specify the parameter value.
Description	Provide an optional description of the parameter value.

Field or Control	Description
Default	Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

See *PeopleTools: PeopleTools Portal Technologies*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 3: Specifying Data Source Parameters.

Step 4: Selecting a Pagelet Display Format

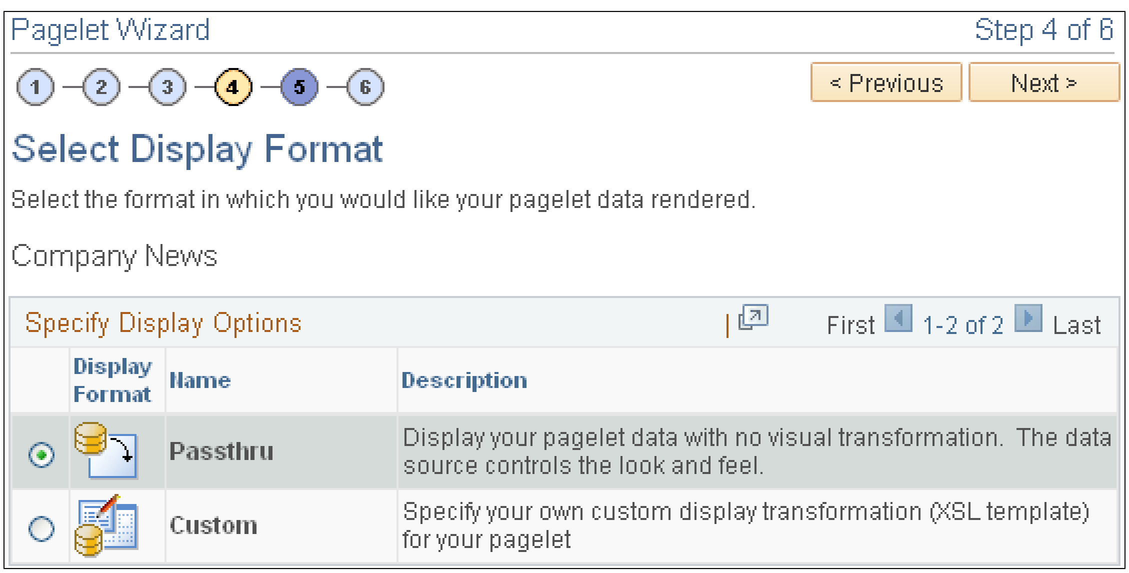
Access the Pagelet Wizard - Specify Display Format page by one of the following methods:

- Selecting *Content Management* and a content item as the data type and clicking the **Next** button on the Pagelet Wizard - Select Data Source page.
- Selecting *Content Management Folder* and a folder as the data type and clicking the **Next** button on the Pagelet Wizard - Specify Data Source Parameters page.

Note: The display formats that appear on this page depend on the data type that you selected on the Pagelet Wizard - Select Data Source page.

This example shows the Pagelet Wizard - Select Display Format page after selecting *Content Management* and a content item on the Pagelet Wizard - Select Data Source page:

This example illustrates the fields and controls on the Pagelet Wizard - Select Display Format page with a content item selected in the Pagelet Wizard - Select Data Source page. You can find definitions for the fields and controls later on this page.



Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

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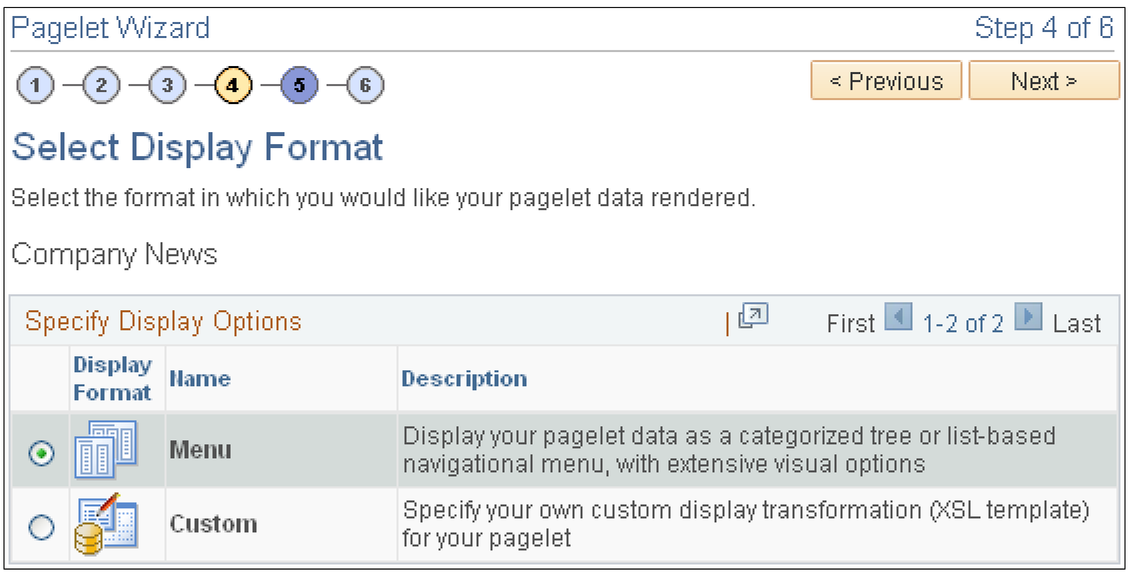
Field or Control	***Description***
Passthru	Display the pagelet with no visual transformation.
Custom	Content Management data source pagelets will not be compatible with the *Custom* display format, when the contents are not well formatted XML. If you select the **Custom** option, in that case an error message appears asking you to correct the problem before continuing.

This example shows the Pagelet Wizard - Select Display Format page with *Content Management Folder* data type selected in the Pagelet Wizard - Select Data Source page:

This example illustrates the fields and controls on the Pagelet Wizard - Select Display Format page with a folder selected in the Pagelet Wizard - Select Data Source page.



Field or Control	***Description***
Menu	Select to display the pagelet as a categorized tree or list-based navigation menu.
Custom	Select to specify a custom display transformation (XSL template) for your pagelet.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 4: Selecting a Pagelet Display Format.

Pagelet Wizard - Specify Display Options Page

Use the Pagelet Wizard - Specify Display Options (custom format) page (PTPPB_WIZ_DISP_CUS) to enter the custom formatting details for the pagelet as well as header and footer options.

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Preview the pagelet.

Navigation:

- Select *Custom* as the display format and click the **Next** button on the Pagelet Wizard - Select Display Format page.
- Click the **Transformation** button from any page in the wizard.

Note: The fields that appear on this page depend on the display format that you selected on the Pagelet Wizard - Select Display Format page.

This example shows Pagelet Wizard - Select Display Options page with *Passthru* display format selected for a content item on the Pagelet Wizard - Select Display Format page. Use this page to enter the pass through formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

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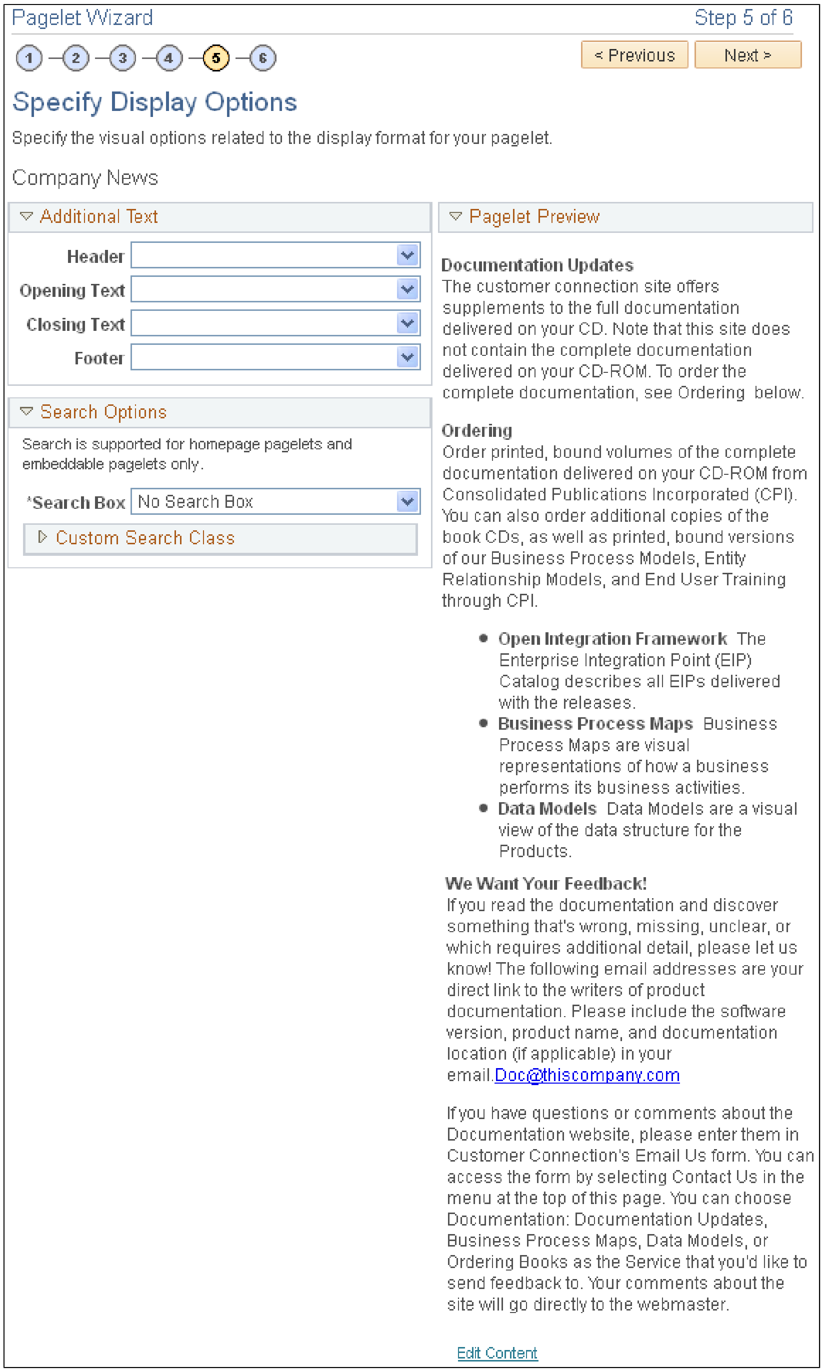
This example illustrates the fields and controls on the Pagelet Wizard - Select Display Options page with Passthru display format selected for a content item.



This example shows Pagelet Wizard - Select Display Options page with *Menu* display format selected for a folder on the Pagelet Wizard - Select Display Format page. Use this page to enter the menu formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

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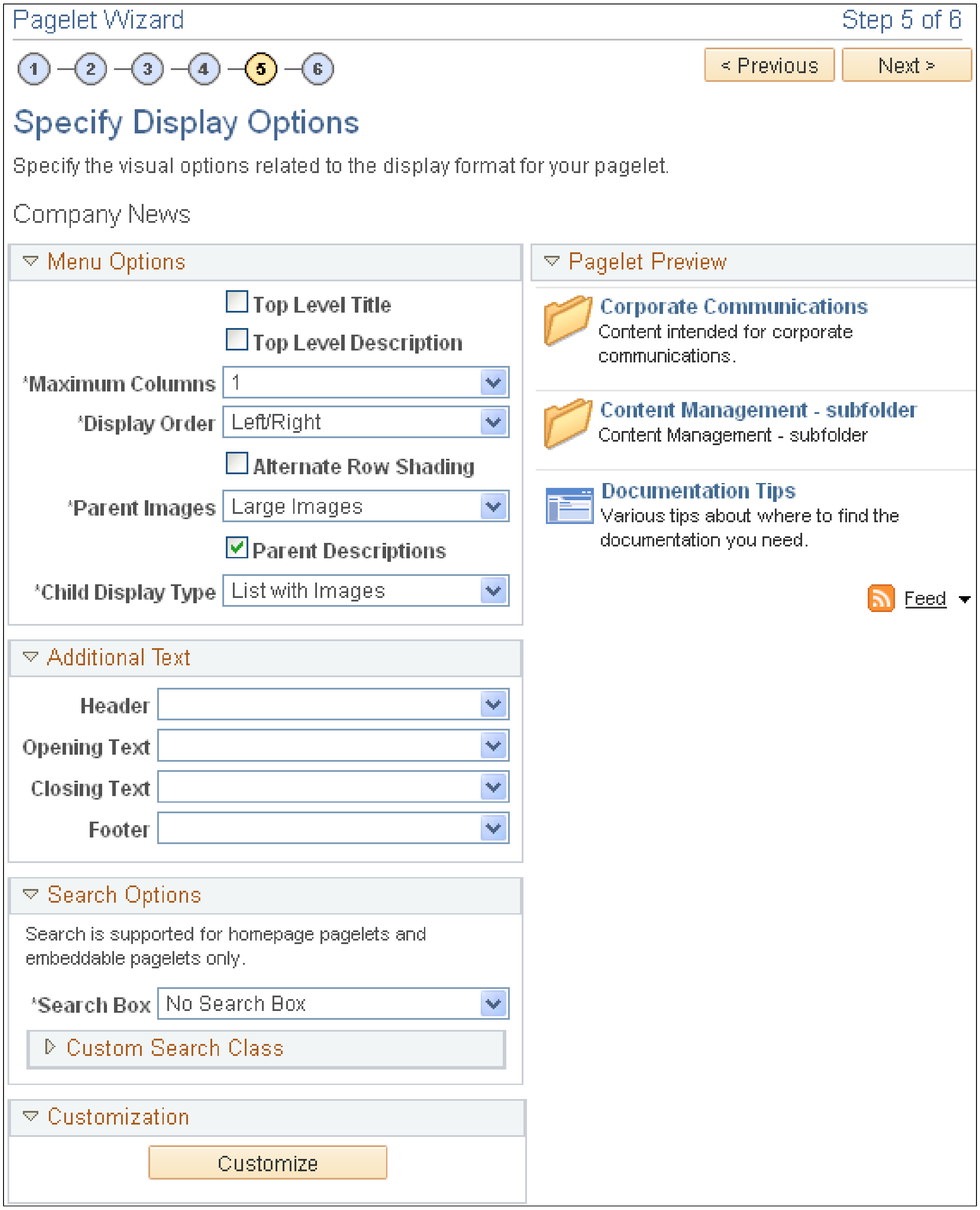
This example illustrates the fields and controls on the Pagelet Wizard - Specify Display Options page with Menu display format selected for a folder.



This example shows Pagelet Wizard - Select Display Options page with *Custom* display format selected in the Pagelet Wizard - Select Display Format page. Use this page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

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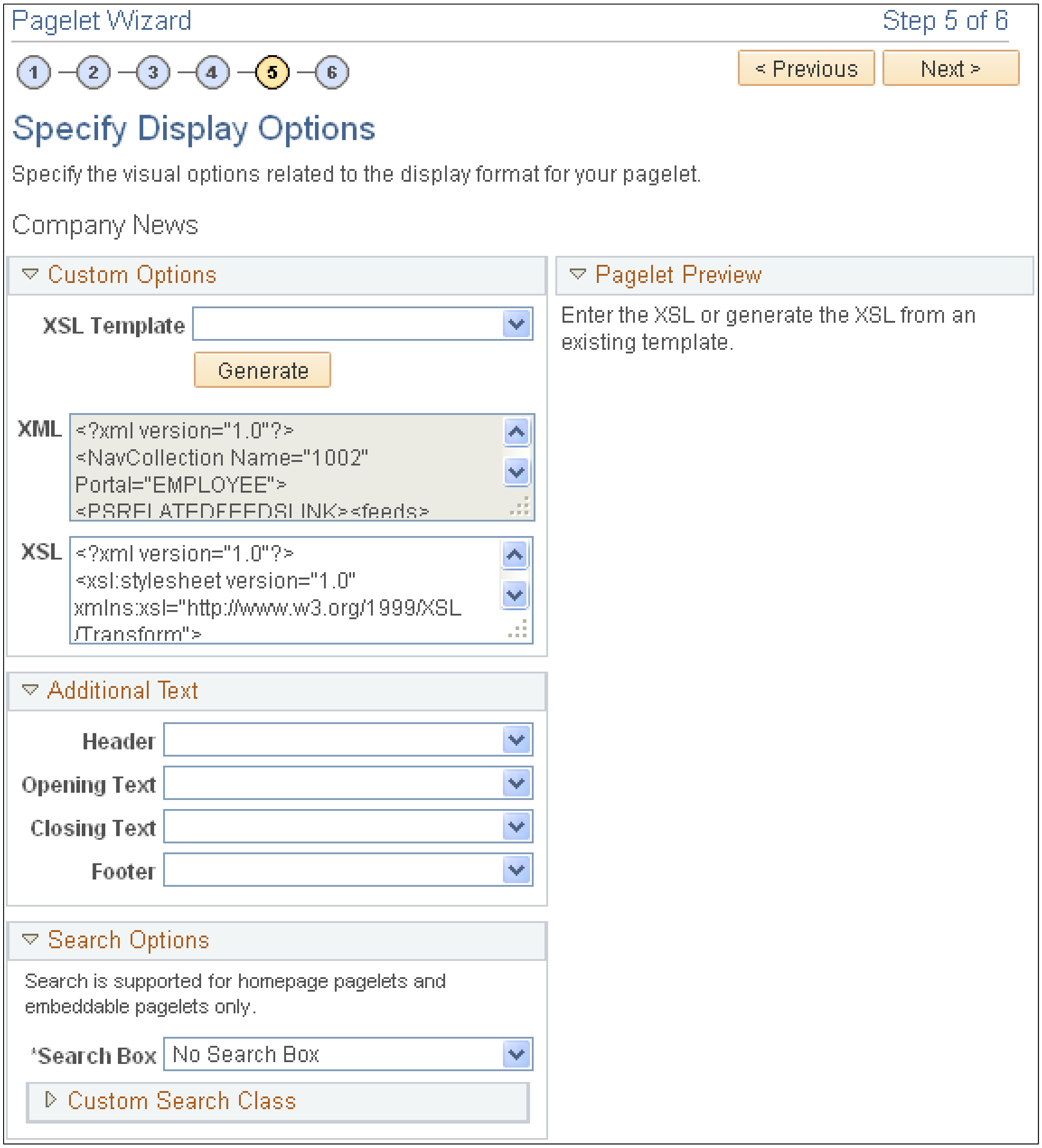
This example illustrates the fields and controls on the Pagelet Wizard - Select Display Options page with Custom display format selected.



Note: If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 5: Specifying Pagelet Display Options.

Pagelet Wizard - Specify Publishing Options Page

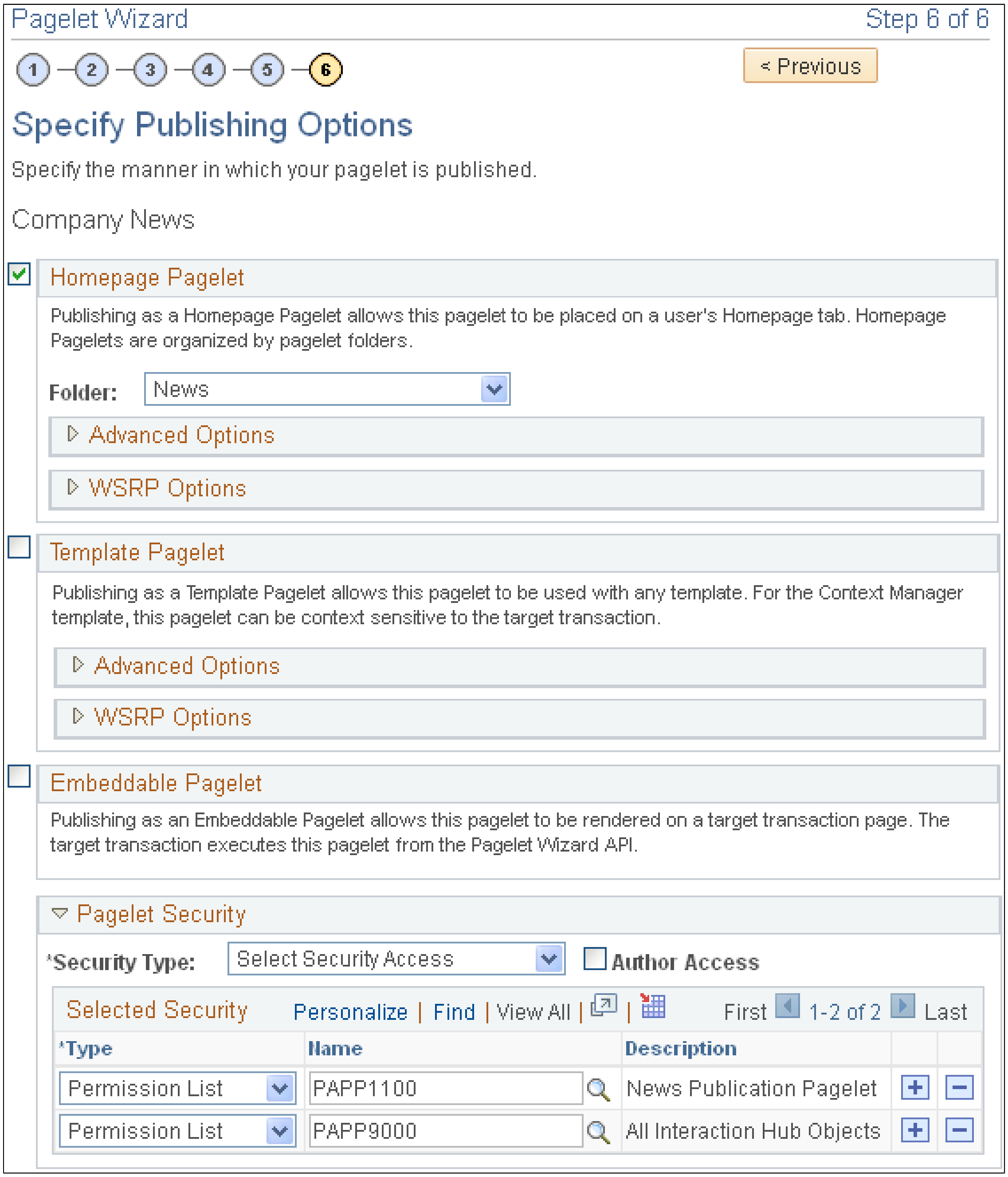
Use the Pagelet Wizard - Specify Publishing Options page (PTPPB_WIZ_PUBOPT) to specify the manner in which the pagelet is published.

Provide registration, caching, and security details, and register the pagelet.

Navigation:

- Click the **Next** button on the Pagelet Wizard - Specify Display Options page.
- Click the **Register Pagelet** button from any page in the wizard.

This example illustrates the fields and controls on the Pagelet Wizard - Specify Publishing Options page.



Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

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See *PeopleTools: PeopleTools Portal Technologies*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 6: Specifying Pagelet Publication Options.

Folder Properties - Publish as Pagelet Page

Access the Folder Properties - Publish as Pagelet page (click the **Publish** button on the Folder Properties - Publish Pagelet Wizard Definition page; or if this folder has already been published as a pagelet, click the **Publish as Pagelet** link on the Folder Properties page).

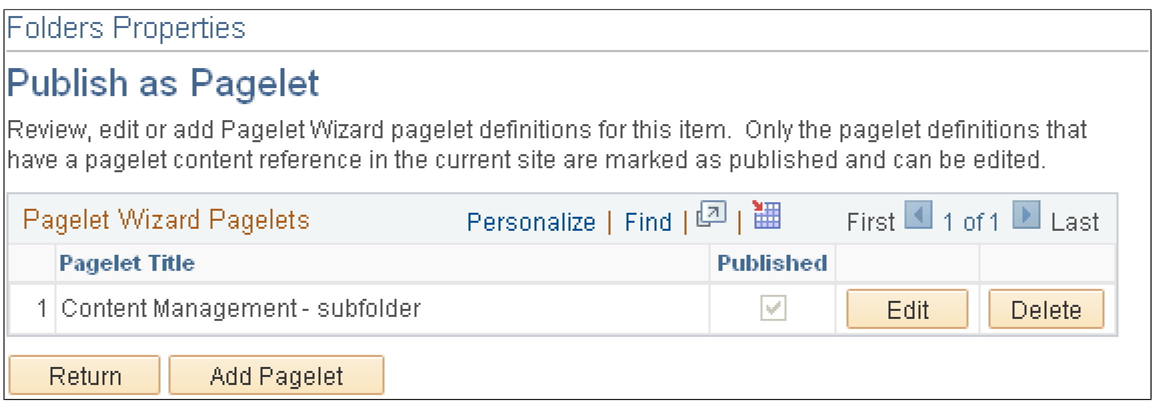
Access the Text or HTML Properties - Publish as Pagelet page (click the **Publish** button on the Text or HTML Properties - Publish Pagelet Wizard Definition page; or if this content item has already been published as a pagelet, click the **Publish as Pagelet** link on the Text or HTML Properties page).

Access the File Attachment Properties - Publish as Pagelet page (click the **Publish** button on the File Attachment Properties - Publish Pagelet Wizard Definition page; or if this content item has already been published as a pagelet, click the **Publish as Pagelet** link on the File Attachment Properties page).

Access the Web Site URL Properties - Publish as Pagelet page (click the **Publish** button on the Web Site URL Properties - Publish Pagelet Wizard Definition page; or if this content item has already been published as a pagelet, click the **Publish as Pagelet** link on the Web Site URL Properties page).

The following example demonstrates editing a published pagelet for a folder.

This example illustrates the fields and controls on the Folder Properties - Publish as Pagelet page. You can find definitions for the fields and controls later on this page.



Use the Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this folder or content item. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note: Pagelets for this folder or content item published directly from Pagelet Wizard also appear in this list.

Field or Control	***Description***
Published	Indicates the whether the pagelet is published.

Field or Control	***Description***
Edit	Click to access the Publish Pagelet Wizard Definition page, where you can edit pagelet definitions.
Delete	Deletes this pagelet definition and the published pagelet content references in all sites.
Add Pagelet	Click to access the Publish Pagelet Wizard Definition page, where you can publish content as a pagelet to a site or portal.

Publish to Multiple Portals page

Use the Publish to Multiple Portals page (PTPP_PMPUBPRTL) to publish the pagelet definition to additional portals and sites.

Navigation:

- Click the **Publish Pagelet in Other Sites** link on the Publications Properties - Publish Pagelet Wizard Definition page.
- Portal Administration, Pagelets, Publish Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets

Note: When a content item is published as a pagelet, the Edit Content link displayed in the published pagelet will redirect the user to edit the content in the portal or site where the content resides, and not to the portal or site where the pagelet is displayed.

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.

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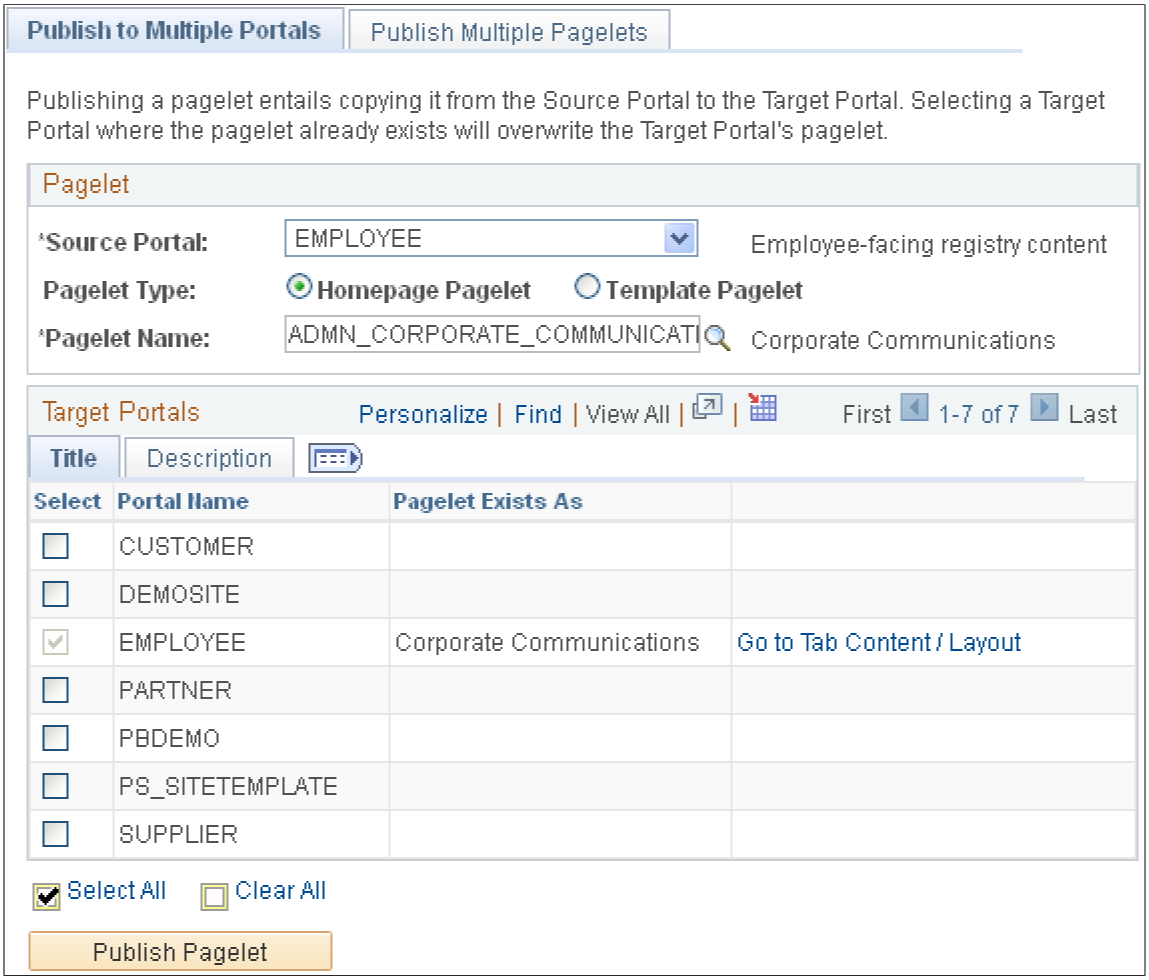
This example illustrates the fields and controls on the Publish to Multiple Portals page.



- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

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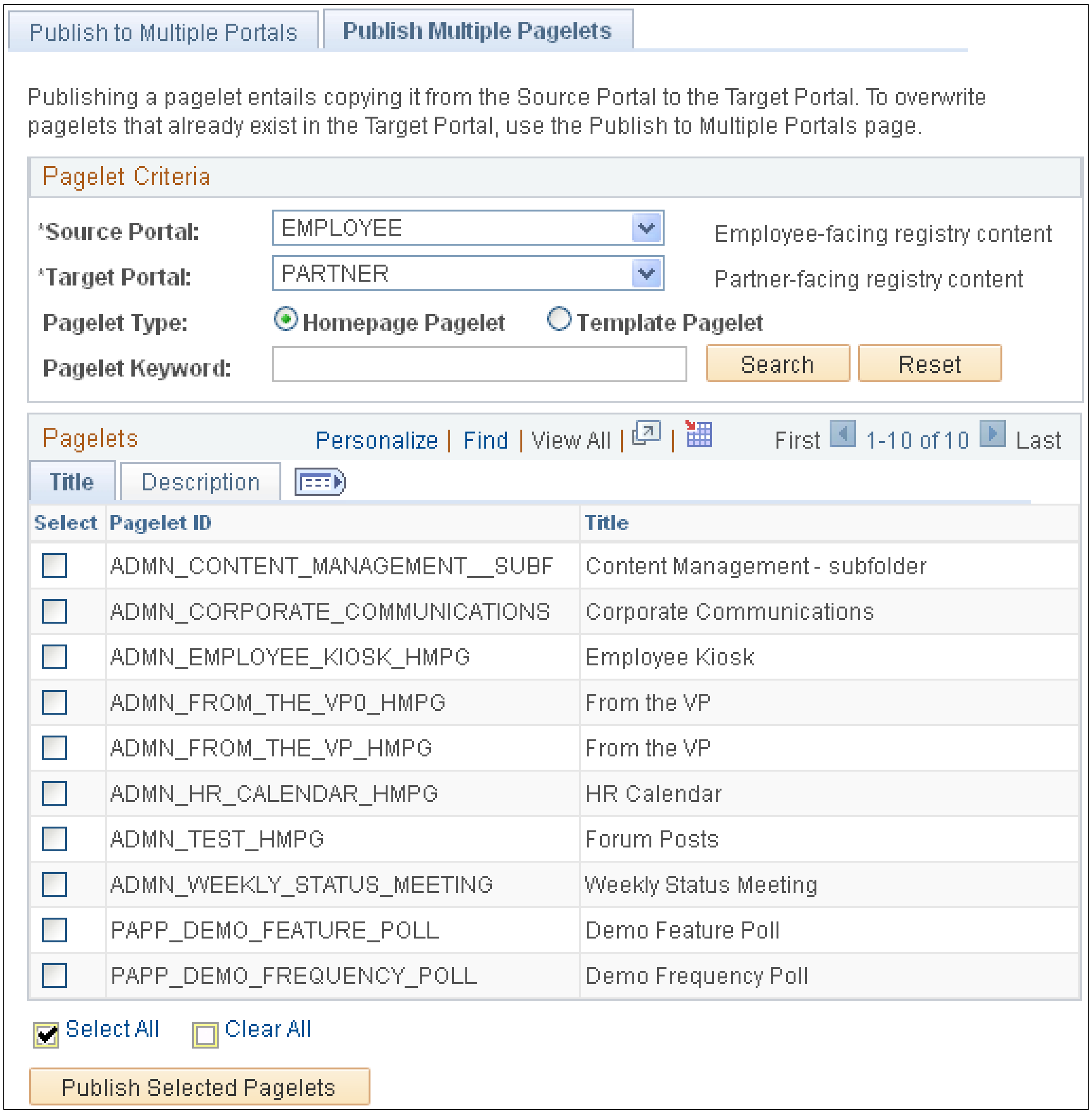
This example illustrates the fields and controls on the Publish Multiple Pagelets page.



See *PeopleTools: PeopleTools Portal Technologies*, “Working With Navigation Pages,” Publishing Pagelets.

Adding a Piece of Managed Content

This topic discusses ways to add content attachments and new content to Managed Content folders.

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Pages Used to Add a Piece of Managed Content

Page Name	***Definition Name***	***Usage***
Browse Managed Content - Add Content Page	EPPCM_ADDCONT_SEC	Specify the type of content you want to add to a folder in managed content.
<Content Type> Properties Page	EPPCM_CONT_MAIN	Enter content properties such as title, summary, and content location to submit content for publication and to maintain comments or discussions specific to that piece of content, among other functions. After you select a content type, a Content Attachment Properties page appears based on the content type you selected. When content is added to managed content, its status is set to checked out.
Content Locations Page	EPPCM_CONT_LOC	Move content to a different folder or add more locations.
Add Content Locations Page	EPPCM_CONT_TREEADD	Select new locations for the content.
Content Attachment Properties - Move Content	EPPCM_CONT_TREEMOD	Move content to a new folder.
Content Notification	EPPCM_CONT_NTFY	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Enter additional comments about this content item.
Post Details Page	EPPDF_VIEW_TOPIC	Start a new discussion or edit an existing discussion for this content item. See Starting and Viewing Discussions, Post Details Page section.
Edit a Post Page	EPPDF_REPLY_TOPIC	Edit an existing discussion. See Starting and Viewing Discussions, Edit a Post Page and Add a Reply Page section.
Add a Reply Page	EPPDF_REPLY_TOPIC	Respond to a discussion. See Starting and Viewing Discussions, Edit a Post Page and Add a Reply Page section.

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Understanding Content Types

Based on the type of content you select, you must either upload attachments, enter URL information, or create the document using text or HTML.

This table describes the types of content you can add:

Content Type	***Description***
File attachment	Upload a file to the file storage (record based BLOB or the web server).
Text or HTML	Create a document using either text or HTML.
Image attachment	Upload a file attachment image to the web server and enable it to render as an image.
Image URL	Enter the URL of an already web-enabled image.
Web site URL	Enter the URL of a web site.

Browse Managed Content - Add Content Page

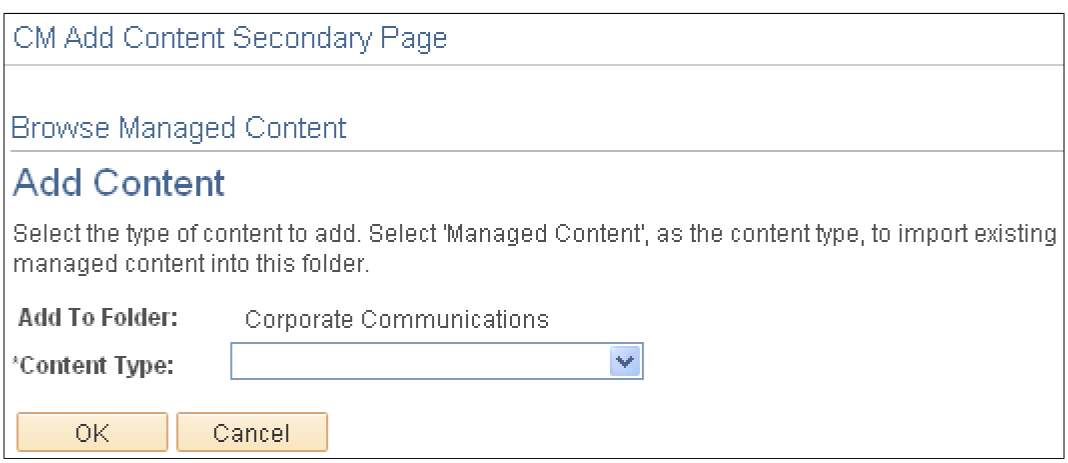
Use the Browse Managed Content - Add Content page (EPPCM_ADDCONT_SEC) to specify the type of content you want to add to a folder in managed content.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title and click the **Add Content** button on the Browse Managed Content page.

This example illustrates the fields and controls on the Browse Managed Content - Add Content page. You can find definitions for the fields and controls later on this page.



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Field or Control	***Description***
Add To Folder	Displays the name of the folder that the content is being added to.
Content Type	Select a content type. The available options are: • *File Attachment*: Upload files into Content Management. • *Image Attachment*: Upload an image file. • *Image URL*: Upload a web-enabled image file URL. • *Text or HTML*: Use HTML or text to be rendered as HTML. • *Web Site URL*: Enter a web URL.
OK	After you select a content type and click this button, a Content Attachment Properties page appears based on the content type you selected.

<Content Type> Properties Page

Use the Content Attachment Properties page (EPPCM_CONT_MAIN) to enter content properties such as title, summary, and content location to submit content for publication and to maintain comments or discussions specific to that piece of content, among other functions.

Navigation:

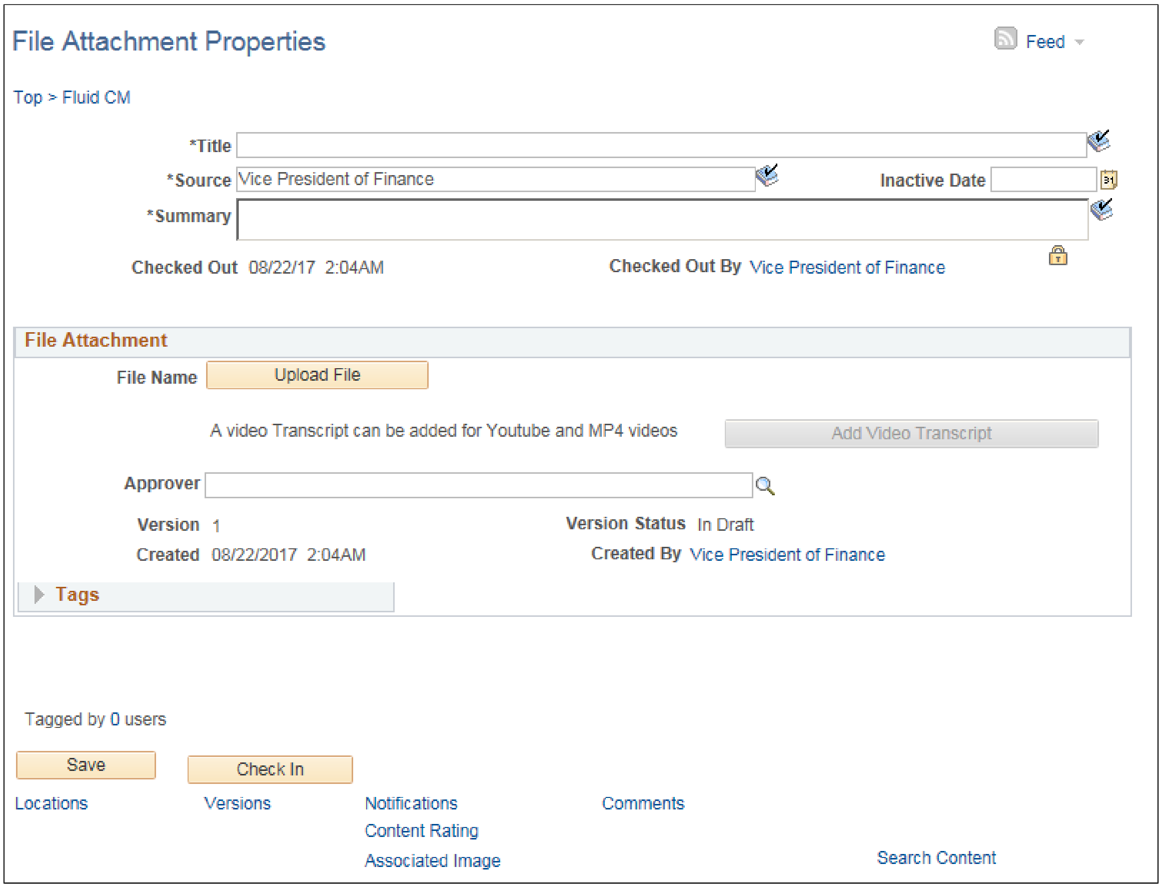
Content Management > **Managed Content** > **Browse Folders**

Click a folder title and click the **Add Content** button on the Browse Managed Content page.

Select a content type from the drop-down list and click the **OK** button.

Note: The name that appears on this page depends on the content type that you selected on the Browse Managed Content - Add Content page.

File Attachment Properties Page



Field or Control	***Description***
Feed	Click to open the feed contain this item, if available. See “Publishing PeopleSoft Interaction Hub Content as a Feed” (Using Portal Features).
Inactive Date	Displays the inactive date based on the default inactive date of the folder. Content with an inactive date previous to the current date does not appear in the content list of the Browse Content or the My Content pages. However, inactive content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. The publishing feature such as News Publication or Manage Navigation uses the expiration date to control when the content no longer appears.
Check Out	Displays the date and time when the content was last checked out.

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Field or Control	***Description***
Check Out By	Displays the user name who checked out the content. Click the name link to access the Instant Message page, where you can send a instant message to the person who checked out the content.
Upload File	Click to open a new browser window where you can select a file to upload. **Note:** Uploaded files are saved automatically. When the folder properties are set to auto-approved, the **Version Status** field indicates that new content is approved when it is added.
Add Video Transcript	Click to add video transcripts for the uploaded video. **Note:** The Video Transcript button is enabled only for MP4 videos and youtube URLs.
Approver	Select the ID of the user who is assigned to approve the content. After this field is populated and the content is checked in, the **Submit for Approval** button appears. Approvers are folder members with the approval privilege. **Note:** Only one approver can be assigned and only one level of approval is built in. If you need more levels of approval, you can increment the version as each version has its own approval cycle. Approvers are only available for content that is created with the *Require Approval* option selected.
Version Status and **Version**	System assigns a status of *In Draft* and the version number *1* for new content. **Note:** When the folder properties are set to auto-approved, the **Version Status** field indicates that new content is approved when it is added.
Tag	Click to expand and access the content properties to view or edit tags. See “Publishing PeopleSoft Interaction Hub Content as a Feed” (Using Portal Features).
Save	Click to add content to managed content. After you click this button, the content status is set to checked out and the **Cancel Check Out** button appears.

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Field or Control	***Description***
Check in	Click to unlock the content item and make it accessible to authorized folder members for review or edit. **Note:** The **Check In** and **Cancel Check Out** buttons are replaced with the **Check Out** and **Submit For Approval** buttons.
Locations	Click to move this content item to a different folder or add it to multiple folders, as well as view all the locations for the content. **Note:** When using the Managed Content feature, the Locations page shows all the locations for all the feature types where the content exists. The Location page for all other feature types will show only the locations for the current feature type.
Versions	Click to access the File Attachment Properties - Content Versions page, where you can review, delete, or check out different versions of a specific content item.
Notifications	Click to create a list of interested parties or to send email notifications of saved content to the list of interested parties.
Comments	Click to add additional comments about this content item. **Note:** Comments are auto-generated for created versions. Comments can be added or updated only to the current version for the content.
Search Content	Click to search for existing content items. See Searching for Folders and Content.
Start Discussions	Click the **Start Discussions** link to begin a discussion topic. **Note:** Discussion topics stay with the content item. They cannot be accessed outside of the Content Properties page.
View Discussions	If a discussion topic already exists, click to view, edit, or enter a response to it.
Data Attributes	Click to assign attributes that control who can access this content. This link appears only if portal administrators have enabled this feature. See Content Data Attributes Page.

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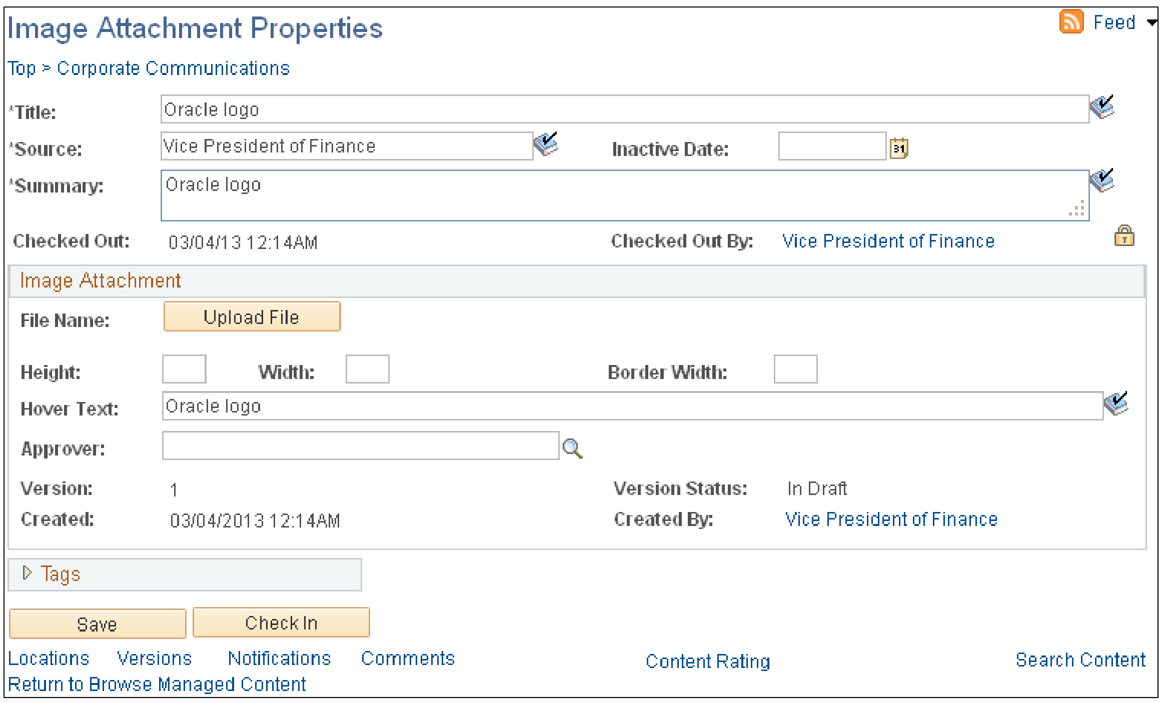
Field or Control	***Description***
Return to Browse Managed Content	After you have completed attaching a file, click this link to return to the Browse Managed Content page.

Adding Image Attachment

This example shows the Image Attachment Properties page with the *Image Attachment* option selected in the Browse Managed Content - Add Content page:

This example illustrates the fields and controls on the Image Attachment Properties page with the Image Attachment option selected in the Browse Managed Content - Add Content page. You can find definitions for the fields and controls later on this page.



Use the Image Attachment Properties page to add new image contents to Managed Content folders.

Field or Control	***Description***
Height	Use this property to specify the height of the image. This property takes a numeric value. The unit of measurement is pixels.
Width	Use this property to specify the width of the image. This property takes a numeric value. The unit of measurement is pixels.

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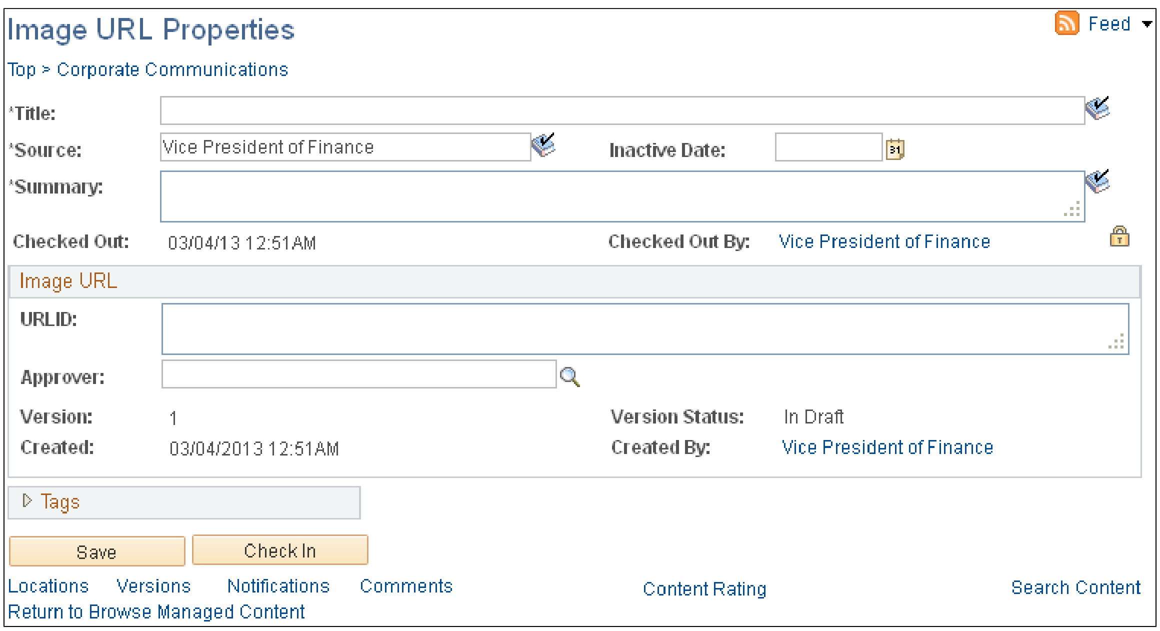
Field or Control	***Description***
Border Width	Specify the width of lines in the border. This property takes a numeric value. The unit of measurement is pixels.
Hover Text	Enter the text or mouse-over text that displays additional or supplemental information about the image.

Adding Image URL

This example shows the Image URL Properties page with the *Image URL* option selected in the Browse Managed Content - Add Content page:

This example illustrates the fields and controls on the Image URL Properties page with the Image URL option selected in the Browse Managed Content - Add Content page. You can find definitions for the fields and controls later on this page.



Use the Image URL Properties page to add new image URL contents to Managed Content folders.

Field or Control	***Description***
URL	Enter any HTTP-accessible URL as the new image URL for the content folder.

Adding Text or HTML

This example shows the Text or HTML Properties page with the *Text or HTML* option selected in the Browse Managed Content - Add Content page:

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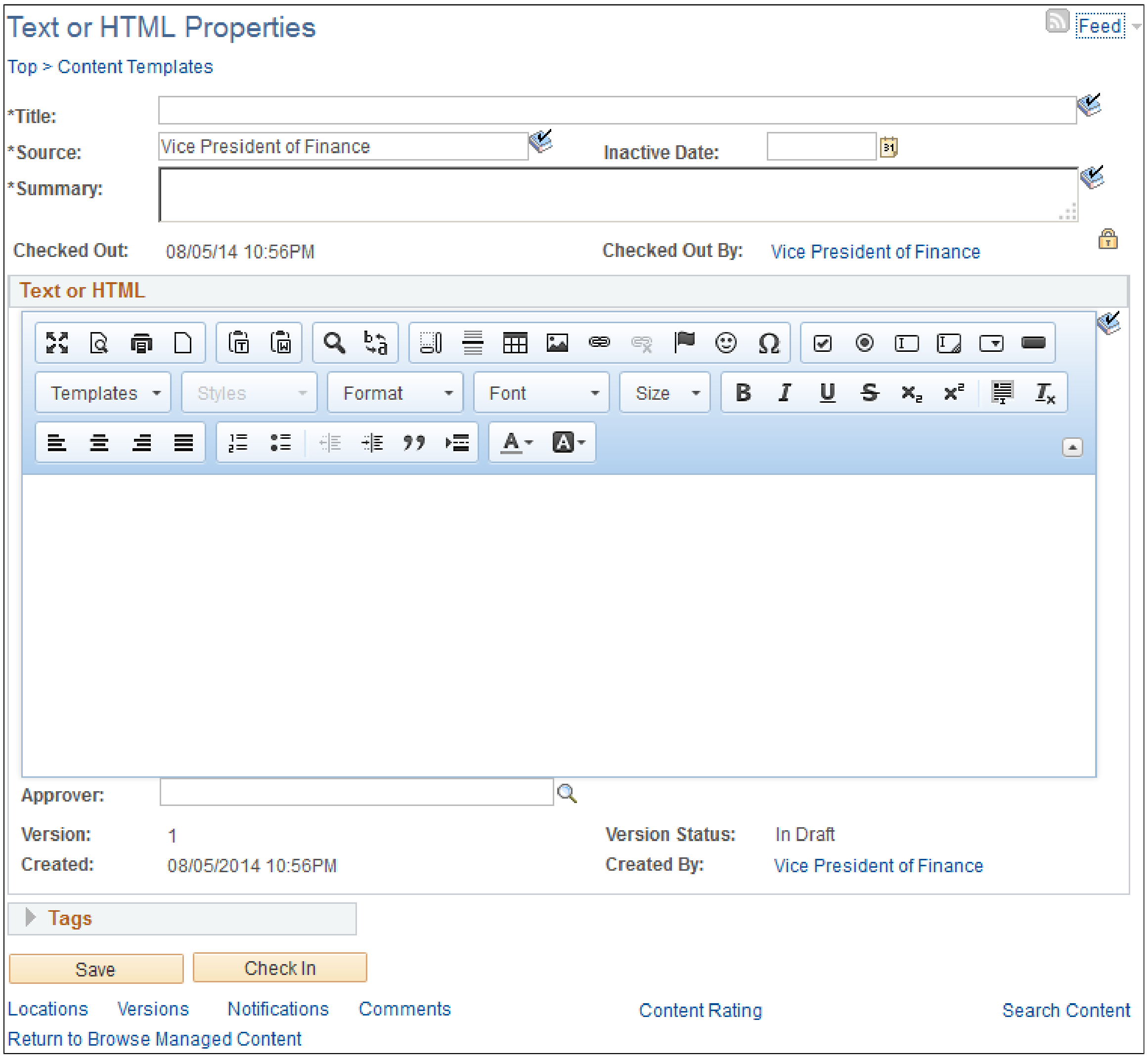
This example illustrates the fields and controls on the Text or HTML Properties page with the Text or HTML option selected in the Browse Managed Content - Add Content page. You can find definitions for the fields and controls later on this page.



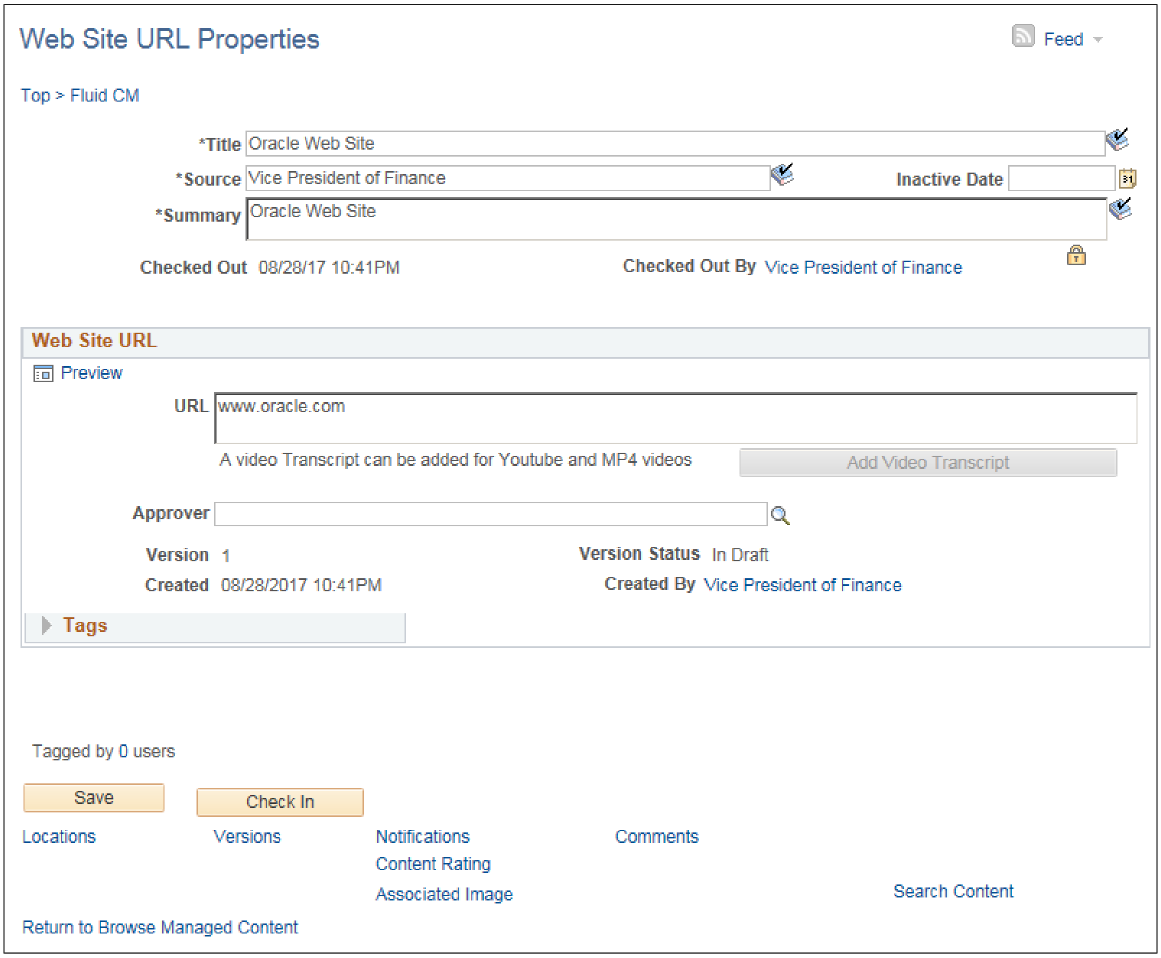
Use the Text or HTML Properties page to add text or HTML contents to Managed Content folders.

Field or Control	***Description***
Text or HTML	Enter the text or HTML code that you want to use as the source for the content folder.
Templates	Click this to select a template. Templates that are created and saved in the Content Templates folder are displayed in the Templates list.

Adding Web Site URL

This example shows the Web Site URL Properties page with the *Web Site URL* option selected in the Browse Managed Content - Add Content page:

This example illustrates the fields and controls on the Web Site URL Properties page with the Web Site URL option selected in the Browse Managed Content - Add Content page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
URL	Enter any HTTP-accessible URL as the new content URL for the managed content folder. **Note:** If you provide a URL for youtube or MP4 video, then Add Video Transcript button is enabled, wherein you can add video transcripts for the uploaded video.

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Managing Versions

This topic discusses the Managed Content approval process.

Pages Used to Manage Content Versions

Page Name	***Definition Name***	***Usage***
My Managed Content – Checked Out Page	EPPCM_USER_MAIN	Edit and view all content that was checked out by you.
Browse Managed Content Page	EPPCM_HIERTOP_MAIN	Edit and view all content that was checked out by you.
Content Data Attributes Page	EPPCM_CONT_ATT	Assign business attribute controls to a piece of managed content.
Content Versions Page	EPPCM_CONT_VER	Review, delete, or check out different versions for a specific content item.
Content Attachment Properties Page	EPPCM_CONT_MAIN	Modify content properties, such as content location, content approver, and content version; check content out, check it in, and submit it for approval; and maintain comments or discussions specific to that piece of content, and other functions.
Content Locations Page	EPPCM_CONT_LOC	View information about the folders in which the content is published. From this page, you can move content to a new folder on the Move Content page. In addition, from this page, you can specify additional folders in which the content is available on the Add Content Locations page. Specifying an additional location does not create another copy of the content; instead, it creates a link so that only one instance of the content is present within managed content.
Add Content Locations Page	EPPCM_CONT_TREEADD	Select an additional location for the content.
Start Discussion Confirmation Page	EO_PE_YESNOCONFIRM	Use to confirm the start of a discussion on this piece of content. See Starting and Viewing Discussions.

Page Name	***Definition Name***	***Usage***
Post Details Page	EPPDF_VIEW_TOPIC	Use to start a new discussion, edit an existing discussion, or view an existing discussion for a content item. From this page, you can edit the existing discussion, delete the discussion entirely, and add a reply, among other tasks. See Starting and Viewing Discussions.
Discussion Page	EPPDF_REPLY_TOPIC	Enter or edit a discussion topic. See Starting and Viewing Discussions.
Edit a Post Page	EPPDF_REPLY_TOPIC	Edit an existing discussion. See Starting and Viewing Discussions.
Add a Reply Page	EPPDF_REPLY_TOPIC	Respond to a discussion. See Starting and Viewing Discussions.
My Managed Content Status Page	EPPCM_STAT_MAIN	View, at a glance, the work that you need to perform based on the status of managed content.
Content Notification	EPPCM_CONT_NTFY	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Enter additional comments about this content item.

Related Links

Understanding Managed Content

Understanding the Managed Content Approval Process

Managed content enables users to share content among users. It offers a check-in and check-out function, version controls, and an approval process to safeguard and manage the quality of content that is made available for publishing to a wider audience.

To approve content for publishing:

1. Add new content.

   Select locations and verify folder membership.

2. Check content in.

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Other authorized folder members can now check out and review or edit the content.

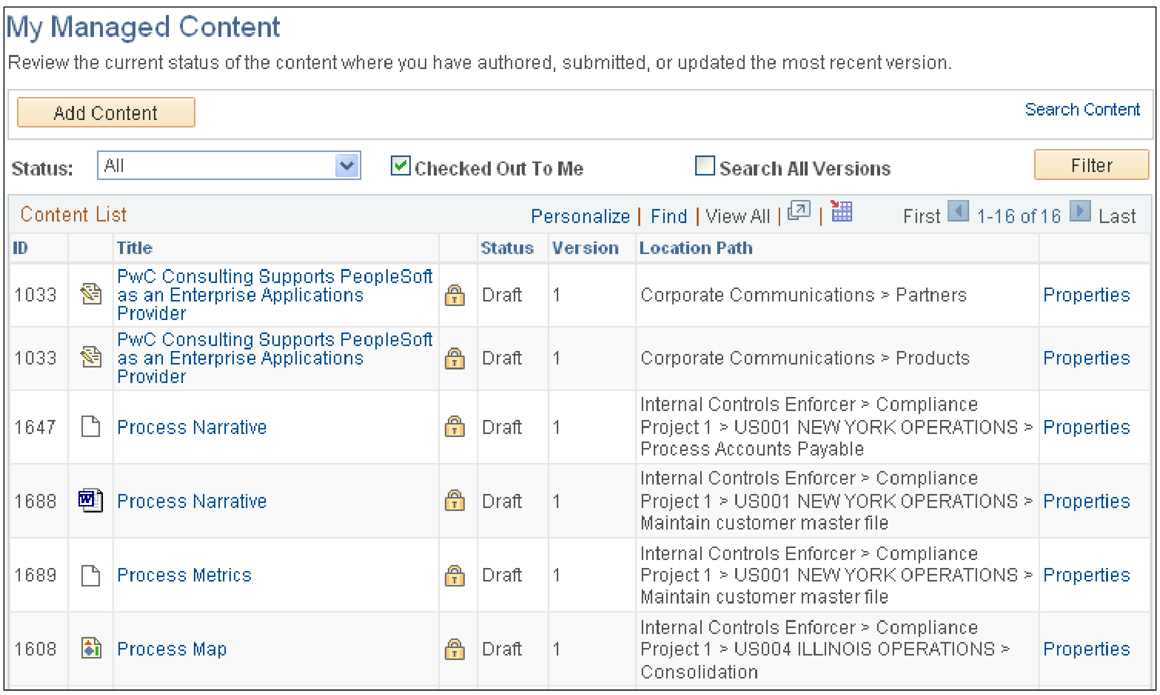
3. Submit completed content for approval.

4. Approve content.

My Managed Content – Checked Out Page

Access the My Managed Content – Checked Out page (select **My Content** > **My Managed Content;** click the **Check out** link).

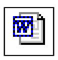
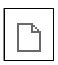
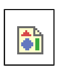
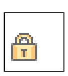
This example illustrates the fields and controls on the My Managed Content - Checked Out page showing content items that are filtered by the Status and Checked Out To Me fields. You can find definitions for the fields and controls later on this page.



When clicking a *Content Item Status* link on the My Managed Content Status page, you are redirected to the My Managed Content page with the filters set according to the status selected. These filters can be adjusted directly on the My Managed Content page. The content is automatically filtered to only return content rows where the user is the creator, updater, or approver of the last version.

Selecting the **Search All Versions** option filter will check all versions; however, data retrieval will take longer with this filter selected. The preceding example shows the My Managed Content page when the *Checked Out* content item status is selected.

Note: The newly added content item *How to Retrieve Secure Content* is listed as checked out and locked. You can also see that it is a Microsoft Word document, its latest version is 1, and it is located in two folders.

Field or Control	***Description***
Add Content	Clink to access the Add Content page, where you can add a new content to this section.
Status	Select to search articles with a status of *Draft, Pending, Published, Rejected, Rework,* or *All.*
Checked Out to Me	Select to limit your search to articles that were checked out to you.
Search All Versions	Select this option to check all versions of content; data retrieval will take longer with this filter selected.
Filter	Click to limit the number of articles displayed on the page based on the values entered for the **Status** and **Checked Out to Me** fields.
	Indicates content is in Microsoft Word format.
	Indicates content is a file attachment.
	Indicates content is an image attachment.
	Indicates content is in either text or html format.
Title	Click the content title link to view the content details.
	Indicates content is checked out and locked.
	Indicates content is published.
Status	Displays the current publishing status of this article: *Draft, Pending, Publish, Reject,* or *Rework.* **Note:** You can use the **Status** drop-down list to search based on a selected status.
Version	Displays the version number of the content.

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Field or Control	***Description***
Location Path	Displays the path to the content location. **Note:** Content that is in multiple locations appears multiple times in the list.
Properties	Click to access the content properties page, where you can specify the type of content you want to add to a section of a news publication.

Content Attachment Properties Page

Use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you check in a file attachment, you are prompted to upload it from a local drive and folder.

To check in a content item:

1. Access the My Managed Content page for a list of all content currently checked out to you.

   Select **My Content** > **My Managed Content** > **Check Out.**

2. Click the **Properties** link to access the Content Attachment Properties page.

3. Click the **Check In** button to unlock the content item and make it accessible to authorized folder members for review or edit.

   Members can access the content using a variety of methods, including their own in-box or using browse.

   Note: The **Check In** and the **Cancel Check Out** buttons disappear. The **Check Out** and the **Submit For Approval** buttons appear.

   See Understanding the Folder Hierarchy.

4. Return to the My Managed Content page.

   The content item is no longer listed. You will need to change the filtering criteria to see it.

Browse Managed Content Page

Use the Browse Managed Content page (EPPCM_HIERTOP_MAIN) to edit and view all content that was checked out by you.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a title link.

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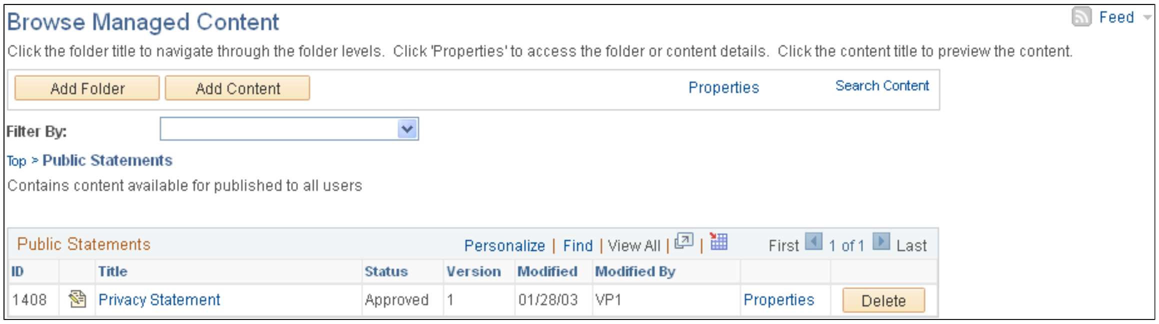
This example illustrates the fields and controls on the Browse Managed Content page, Public Statements folder.



Use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you check out a file attachment, you are prompted to save it to a local drive and folder.

If you navigate to the folder containing the required content, a lock is no longer associated with the file because the content is now checked in. Instead, a star icon indicates the content item was recently added.

Note: The My Managed Content page takes you directly to the content. To find your content using the browse option, you need to know where the content is located.

To check out content items:

1. Click the **Properties** link on the Browse Managed Content page.
2. Click the **Check Out** button on the Content Properties page.

   The content item opens in its original format ready for you to review, edit, or save. For example, the *How to Retrieve Secure Content* item opens in Microsoft Word.
3. Save the content to a location on your computer.

   The Content Properties page reappears. Notice the changes to the **Version, Version Status, Created,** and **Modified** fields. Checking out a piece of content creates a new version with a status of draft.
4. Return to the Browse Managed Content page.

   Notice the icon indicating that this content is checked out and locked, and the version number has changed.

See Understanding Managed Content.

Content Data Attributes Page

Use the Content Business Data Attributes page (EPPCM_CONT_ATT) to assign business attribute controls to a piece of managed content.

Navigation:

Click the **Business Data Attributes** link on the Content Properties page.

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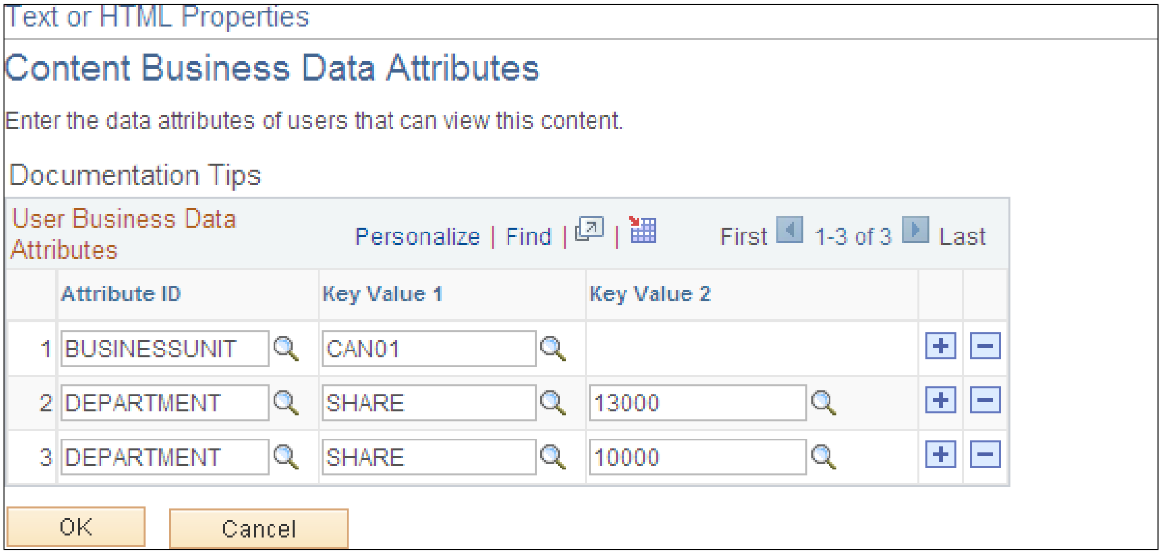
This example illustrates the fields and controls on the Content Business Data Attributes page. You can find definitions for the fields and controls later on this page.



Insert one or more rows and select the attribute(s) and key(s) to assign to this content. Only users whose attributes match the values specified will have access to this content.

You can assign multiple business attributes. Values using the same attribute are grouped using the OR operator. Values from different attributes are grouped using the AND operator. For example:

- Suppose Company is defined as an attribute that is used to manage access to content. If both Company A and Company B are assigned to a piece of content, then users from *either* Company A or Company B can access that content.
- Suppose both Business Unit and Department are defined as attributes to manage content access to content. If business unit US001 and department 1000 are assigned to a piece of content, then only users assigned to business unit US001 *and* department 1000 can access that content.

Field or Control	***Description***
Attribute ID	Select the data attribute to use to control access to this content.
Key Value 1	Select the attribute value for the primary key.
Key Value 2	Select the attribute value for the secondary key, if applicable.

Related Links

Administering Content Management Business Attribute Security

"Understanding Business Attribute Usage" (Portal and Site Administration)

Content Versions Page

Use the Content Versions page (EPPCM_CONT_VER) to review, delete, or check out different versions for a specific content item.

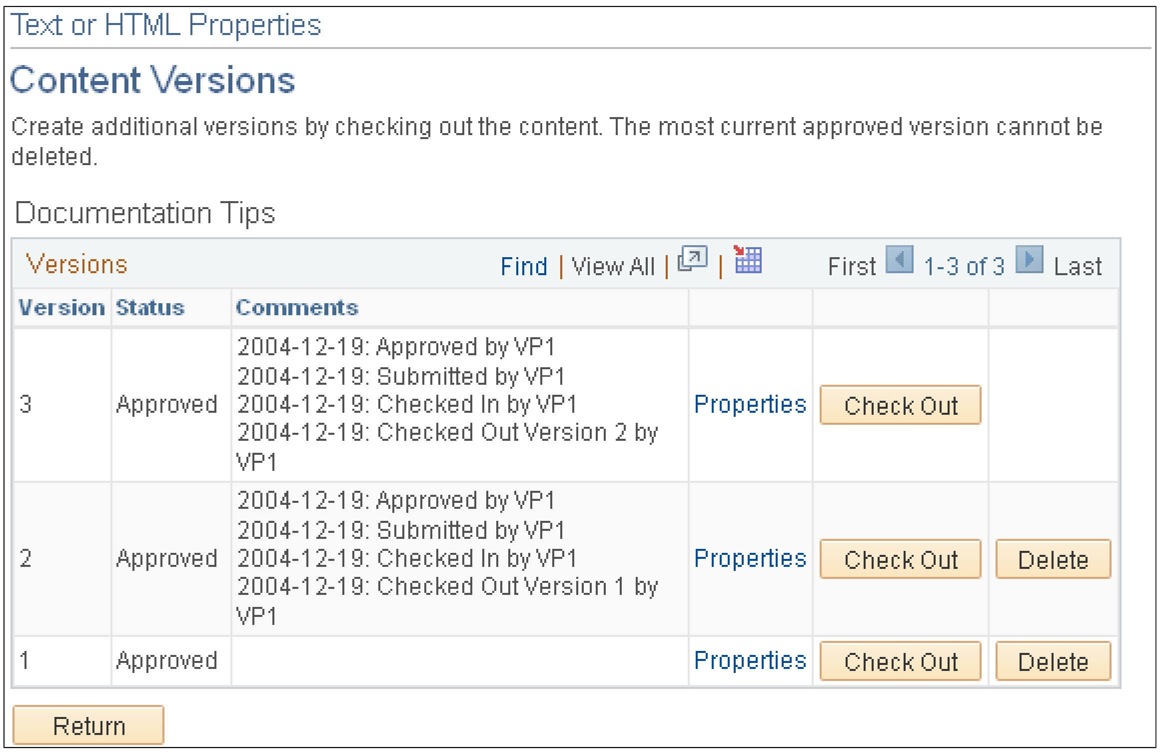
Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click the **Properties** link on the Browse Managed Content or My Managed Content page.

Click the **Versions** link on the Content Properties page.

This example illustrates the fields and controls on the Content Versions page. You can find definitions for the fields and controls later on this page.



Use this page to review, delete, or check out different versions of a specific content item. New versions can only be created by checking content out.

Field or Control	***Description***
Delete	This button is only available for content that has more than one version, and the version to be deleted is not the latest approved version.
Check Out	This button is only available for content that is checked in. Click to check out content and create a copy of the specific version it is used.

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Submitting Content Items for Approval

You can select an approver at your discretion from the users who have been granted approval privileges for this folder. Before you can submit content items for approval, you must check in the content.

To submit content items for approval:

1. Select **Content Management** > **Managed Content** > **Browse Folders.**

   Alternatively, select **My Content** > **My Managed Content.**

2. Access the Content Properties page.

   Click the **Properties** link on the Browse Managed Content page or the My Managed Content page.

3. Select an approver user ID or role.

4. Click the **Submit for Approval** button.

   Note the following:

   - The content is automatically checked out and locked to the approver.
   - The fields on the Content Properties page are only editable by the listed approver because the content is checked out to the approver.
   - The **Version Status** and **Locked To** fields have been updated.

     The icon also indicates that the file is locked. When you submit content for approval, it is automatically checked out to the approver by the system.

   - The **Check Out** button and the **Submit for Approval** buttons disappear. The **Cancel Check Out** button appears.

See Understanding Managed Content.

Content Attachment Properties Page

The Content Attachment Properties page is used to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you approve an item of managed content, you make that item available to be reused in other content management features such as news publications, categorized content, collaborative workspaces, and so on.

To approve a content item:

1. Select **My Content** > **My Managed Content** to access the My Managed Content page to view content items of a particular status, including a list of all content that requires your review and approval.

2. Click the **Properties** link for the desired content on the My Managed Content page.

3. Click the link to review the content.

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For example, if the content is a file attachment, click the file name.

4. Click the **Approve** button if the content is ready to be published.

   Click the **Rework** button if the content requires additional work.

   Notice that the **Modified** and **Version Status** fields were updated and the locked icon was removed.

Approved content is now available for publishing.

Content Locations Page

Use the Content Locations page (EPPCM_CONT_LOC) to view information about the folders in which the content is published.

From this page, you can move content to a new folder on the Move Content page. In addition, from this page, you can specify additional folders in which the content is available on the Add Content Locations page. Specifying an additional location does not create another copy of the content; instead, it creates a link so that only one instance of the content is present within managed content.

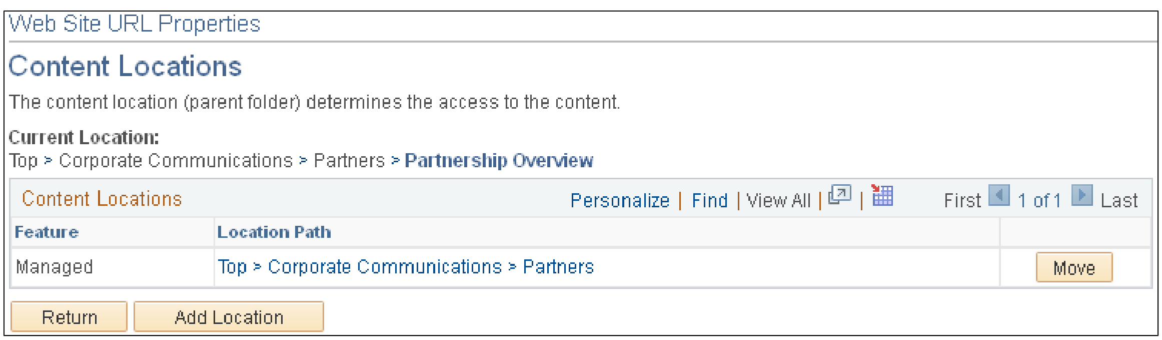
Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title link and click a subfolder title link.

Click an appropriate **Properties** link and click the **Locations** link on the Content Properties page.

This example illustrates the fields and controls on the Content Locations page. You can find definitions for the fields and controls later on this page.



Note: The Content Locations page in the Managed Content feature lists all the folders where the content is located, including the locations of other publishing features that imported the managed content. When the Content Locations page is accessed from a nonmanaged feature, such as Workspaces or Categorized Content, it will only show the content locations for that feature. You can only move content between folders of the current feature in the current site.
When moving content or adding new content locations, be aware that the location (parent folder) determines the access security for the content.

See Top Folder Properties - Move Folder Page.

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Field or Control	***Description***
Move	Click to change the current location of the content.
Add Location	Click to add an additional location for the content.

Add Content Locations Page

Use the Add Content Locations page (EPPCM_CONT_TREEADD) to select an additional location for the content.

Navigation:

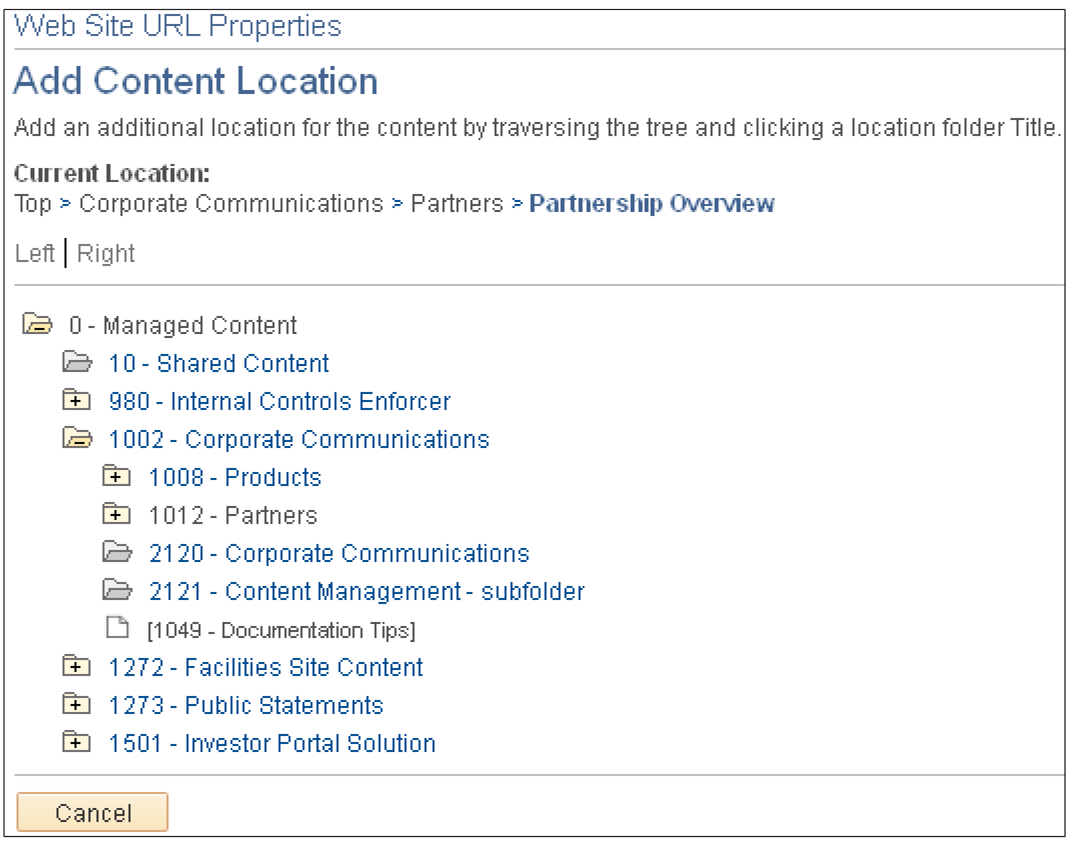
Content Management > **Managed Content** > **Browse Folders**

Click a folder title link and click a subfolder title link.

Click an appropriate **Properties** link and click the **Locations** link on the Content Properties page.

Click the **Add Location** button on the Content Locations page.

This example illustrates the fields and controls on the Add Content Location page.



To select an additional location for the content:

1. Click the folder icons to navigate through the hierarchies.

2. Select the new location by clicking the folder title.

   The Content Locations page appears with the new location listed.

3. Click the **Return** button to return to the Content Properties page.

4. Click the **Save** button.

   The document is now listed in two folders.

Starting and Viewing Discussions

The **Start Discussions** link on the Content Properties page enables users to start a discussion, which is then attached to the content item. After a discussion has been started, the link changes to **View Discussions** and is used to edit, respond to, and view discussions.

Note: These discussions stay with the content item, and they can only be accessed from the Content Properties page.

Start Discussion Confirmation Page

Use the Start Discussion Confirmation page (EO_PE_YESNOCONFIRM) to use to confirm the start of a discussion on this piece of content.

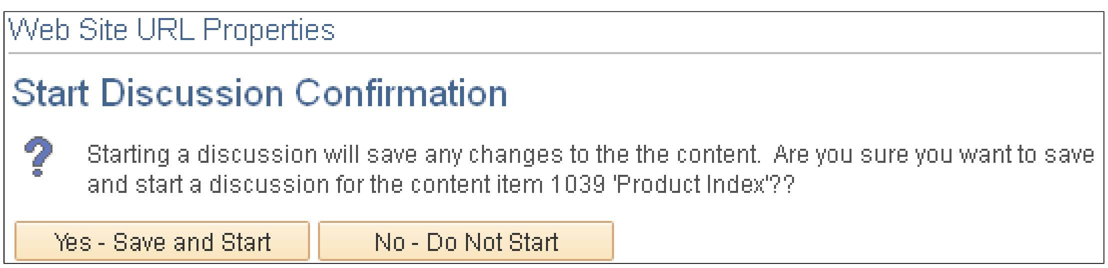
Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title link and click an appropriate **Properties** link.

Click the **Start Discussion** link on the Content Properties page.

This example illustrates the fields and controls on the Start Discussion Confirmation page.



Use the Start Discussion Confirmation page to confirm the start of a discussion on this piece of content.

Post Details Page

Use the Post Details page (EPPDF_VIEW_TOPIC) to start a new discussion or edit an existing discussion for this content item.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title link and click a content title link.

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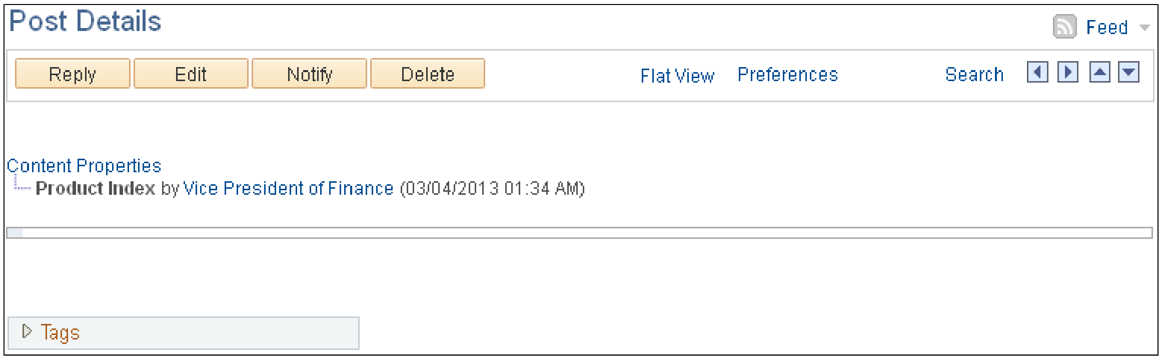
Click the **Start Discussion** link on the Content Properties page.

Click **Yes-Start Discussion** on the Start Discussion Confirmation page.

This example illustrates the fields and controls on the Post Details page.



Use the Post Details page to start a new discussion, edit an existing discussion, or view an existing discussion about a content item.

Edit a Post and Add a Reply Page

Use the Edit a Post page (EPPDF_REPLY_TOPIC) to edit an existing discussion or respond to a discussion.

Navigation:

Content Management > **Content Categorization** > **Browse Folders**

Click the **Add Content** button on the Browse Categorized Content page.

Click the **Start Discussion** link, and click the **Yes-Start Discussion** button.

Click the **Edit** button or the **Reply** button on the Post Details page.

Notice that the title for the topic is the same as the title for the piece of content being discussed.

Use the Add a Reply page (EPPDF_REPLY_TOPIC) to respond to a discussion.

Navigation:

Click the **Reply** button on the Post Details page.

Discussion Page

Use the Discussion page (EPPDF_REPLY_TOPIC) to enter or edit a discussion topic.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title link and click an appropriate **Properties** link.

Click the **Start Discussion** link on the Content Properties page.

Click the **Yes-Save and Start** button and click the **Edit** button.

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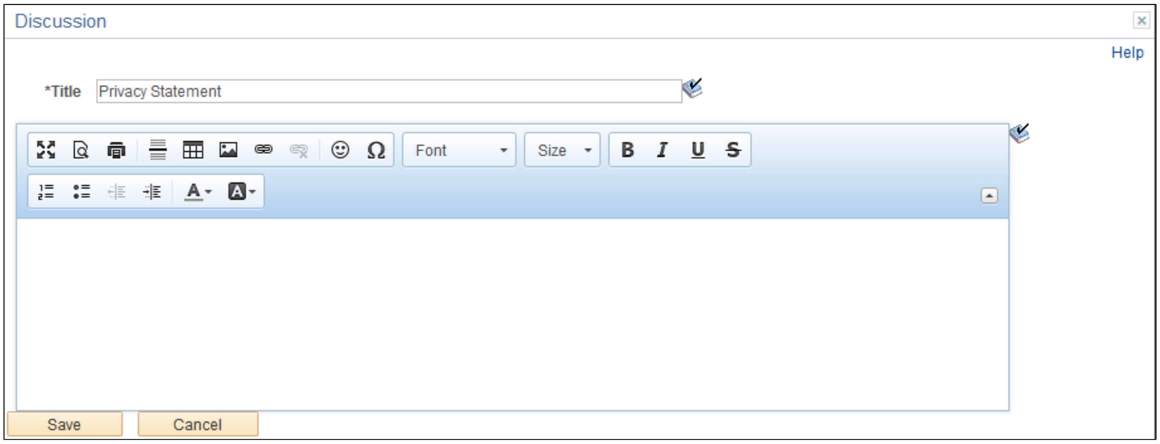
This example illustrates the fields and controls on the Discussion page.



Use the Discussion page to edit a discussion topic. A discussion for a content item contains only one topic, but it can contain one or more replies.

After you post a discussion, click the **Content Properties** link; the **Start Discussion** link is now a **View Discussions** link.

Related Links

"Understanding Discussion Forums" (Using Portal Features)

Creating and Using Tags for Content Management

Tags for Content Management appear on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window without using the application view page. In these instances, tags are only available on the properties page. Application pages appear only in edit or view mode.

To create and use tags for Content Management:

1. Access the pages either by:
   - Selecting **Content Management** > **Managed Content** > **Browse Folder.**
   - Selecting **My Content** > **My Managed Content.**
2. Select any content item.
3. Click an appropriate link to view, edit, or add tag.
4. Enter the tag name, and click the **Update Tags** button.

Note: Security considerations: Users that have access to the content must have the add and view tag permissions. Users that are assigned the Administrator, Author, or Expert roles also are assigned the modify permissions. All users have access to delete their own tags, both public and private. User with Admin privileges can delete all tags in the content, and an Admin user cannot delete the Private tags of other users.

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See “Understanding Tagging in PeopleSoft Interaction Hub” (Using Portal Features).

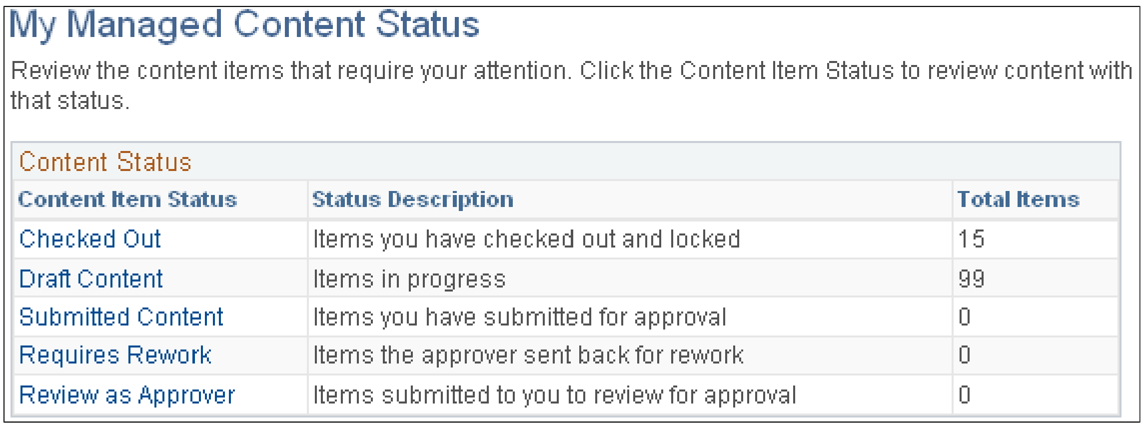
My Managed Content Status Page

Use the My Managed Content Status page (EPPCM_STAT_MAIN) to view, at a glance, the work that you need to perform based on the status of managed content.

Navigation:

Content Management, Managed Content, My Content Status

This example illustrates the fields and controls on the My Managed Content Status page. You can find definitions for the fields and controls later on this page.


My Managed Content Status

Review the content items that require your attention. Click the Content Item Status to review content with that status.

Content Status

Content Item Status	Status Description	Total Items
Checked Out	Items you have checked out and locked	15
Draft Content	Items in progress	99
Submitted Content	Items you have submitted for approval	0
Requires Rework	Items the approver sent back for rework	0
Review as Approver	Items submitted to you to review for approval	0

The My Managed Content Status page and the My Managed Content page enable you to see, at a glance, the work that you need to perform based on the status of managed content.

Field or Control	***Description***
Content Item Status	Click an appropriate link to access the My Managed Content page, where you can preview the content items for the selected status, view their property details, or add new content.

Note: PeopleSoft Interaction Hub provides a My Managed Content homepage pagelet that gives you easy access to the content items that require your attention.

Working With the My Managed Content Pagelet

This topic discusses personalizing My Managed Content pagelet and adding a favorite folder.

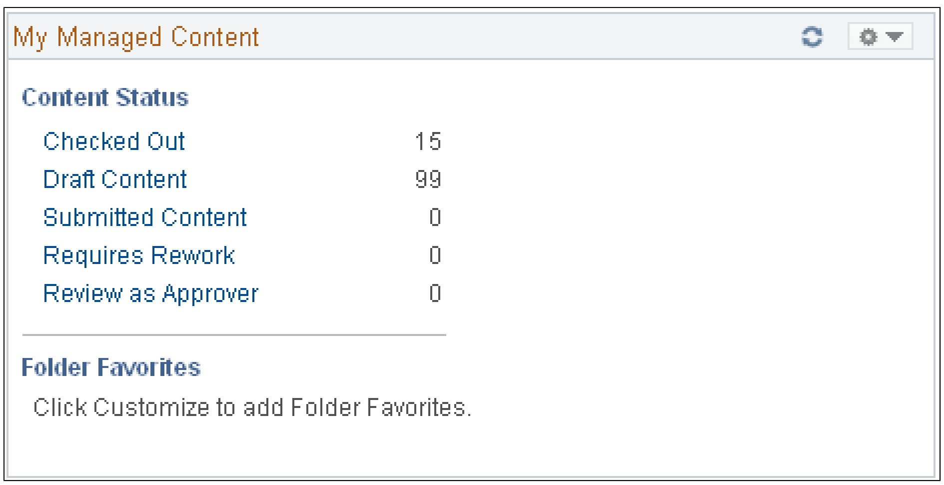
Pages Used to Work With the My Managed Content Pagelet

Page Name	*Definition Name*	*Usage*
Personalize My Managed Content Page	EPPCM_FAV_PREF	Modify the favorite folders that appear in the My Managed Content pagelet.
Add Folder Favorite Page	EPPCM_FAV_TREEADD	Select a folder to add as a favorite for the My Managed Content pagelet.

Understanding the My Managed Content Pagelet

Access the My Managed Content pagelet (click the **Content** link from the menu bar on the homepage and then select the **My Managed Content** option on the Personalize Content page).

This example illustrates the fields and controls on the My Managed Content pagelet. You can find definitions for the fields and controls later on this page.



The My Managed Content pagelet provides an alternative access path to the My Managed Content page and to the Browse Managed Content page for a specific folder.

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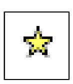
Term	***Definition***
Content Status	Select one of the links under Content Status to access the My Managed Content page with content filtered by your selection. • *Checked Out:* Includes content items that you have checked out. • *Draft Content:* Includes all draft content that has not been submitted. • *Submitted Content:* Includes content that you have submitted for approval but is not yet approved. • *Requires Rework:* Includes content items that are returned to you from an approver who has requested you to rework the content. • *Review as Approver:* Includes content items that are submitted to you for approval. Click a content status link to access the My Managed Content page, where you can access the content item in the selected status. The number adjacent to the content status link indicates the number of content items at that status.
Folder Favorites	Lists the Managed Content folders that you have added to the pagelet. Select a link under the Folder Favorites section to access the Browse Managed Content page for that folder. Add folders that are most important to you, or which you access frequently, or modify them as your needs change. **Note:** Add or delete folders by personalizing the pagelet.
	The star icon indicates that new content has been added to the folder.

Personalize My Managed Content Page

Use the Personalize My Managed Content page (EPPCM_FAV_PREF) to modify the favorite folders that appear in the My Managed Content pagelet.

Navigation:

Click the **Customize** icon on the My Managed Content pagelet.

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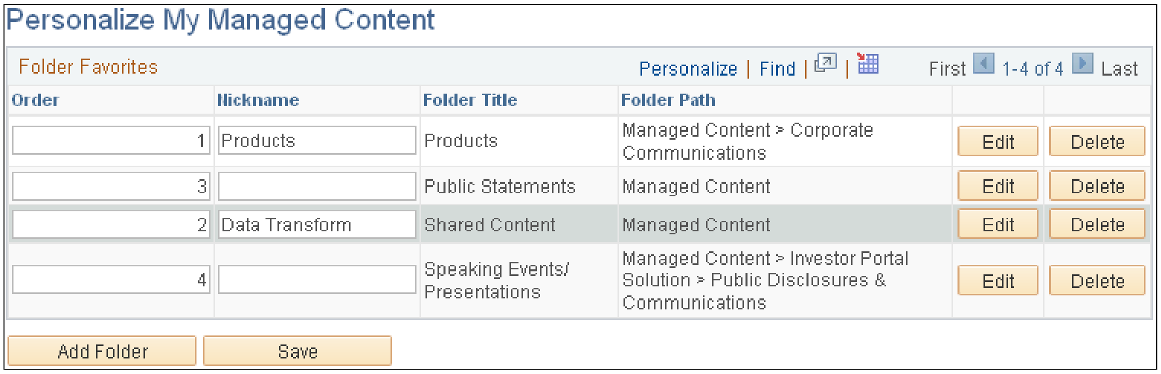
This example illustrates the fields and controls on the Personalize My Managed Content page. You can find definitions for the fields and controls later on this page.



Use the Personalize Content page to select the pagelets that you want to appear on your homepage. Optionally, you can personalize the name of your homepage tab and add a welcome message.

You can add managed content folders to which you have access. The memberships and privileges assigned in Content Management apply.

Field or Control	***Description***
Order	Specify the order in which the folders will appear on the pagelet. Complete the list of folders that you want to display before specifying their display order.
Nickname	Specify the name of the link that will appear on the pagelet. If no name is specified, the managed content folder name appears.
Title	Displays the managed content folder name.
Path	Displays the path to the selected folder from the managed content root. The path matches the folder hierarchy represented in the tree on the Add Folder Favorites page.
Edit	Click to access the Add Folder Favorites page, where you can select a different managed content folder. When you return to the Personalize My Managed Content page, edit the folder order and nickname values, if needed.
Delete	Click to delete the folder. You will be prompted to confirm your deletion.

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Field or Control	***Description***
Add Folder	Click to access the Add Folder Favorites page, where you can select a managed content folder that you want to add to the pagelet.

Add Folder Favorite Page

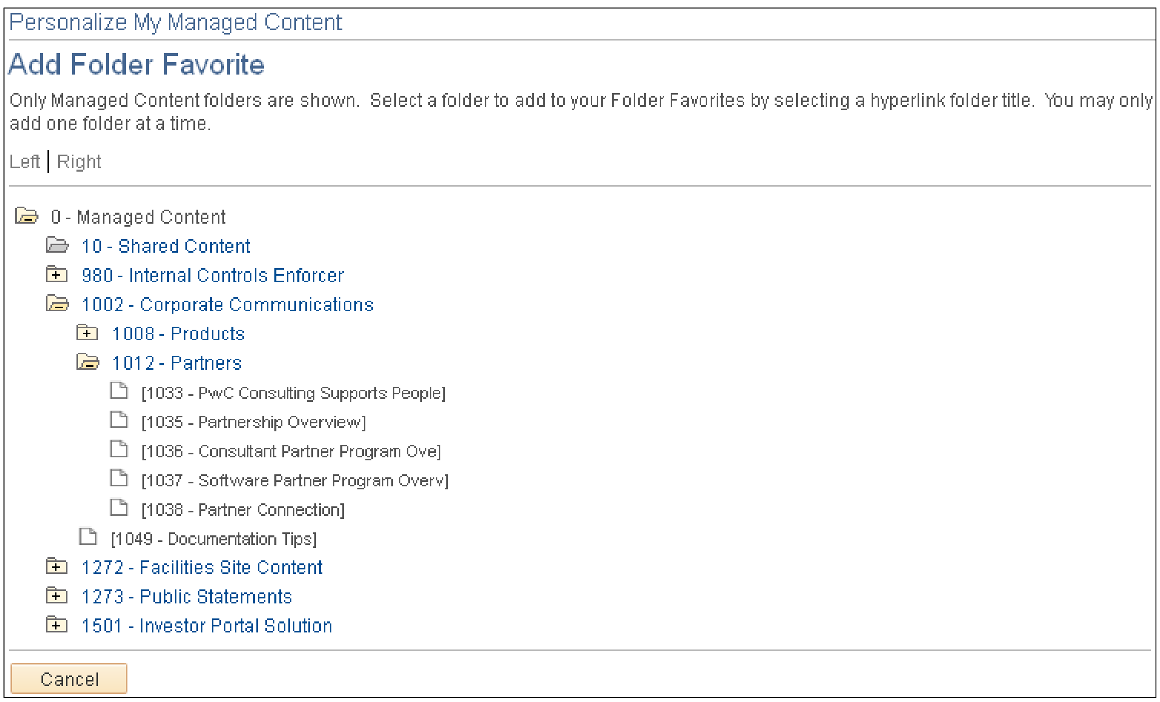
Use the Add Folder Favorite page (EPPCM_FAV_TREEADD) to select a folder to add as a favorite for the My Managed Content pagelet.

Navigation:

Click the **Customize** icon on the My Managed Content pagelet.

Click the **Add Folder** button on the Personalize My Managed Content page.

This example illustrates the fields and controls on the Add Folder Favorite page. You can find definitions for the fields and controls later on this page.



Expand each managed content folder to display additional subfolders, if any. Select a folder to add it to your folder favorites.

The selected folder will be added to the list of folder favorites on the Personalize My Managed Content page.

The system displays only the folders for which you have viewing privileges.

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Importing Managed Content into Other Features

This section discusses how to import Managed Content.

Using the Add Content page (EPPCM_PUB_SELECT), you can import Managed Content into these publishing features:

- News publications
- Categorized content
- Content pagelets
- Manage navigation
- Discussion forums
- Action items
- Calendar events

To import managed content:

1. Browse folders to navigate to the folder where you want to import the managed content.

   For example, select **Content Management** > **Categorized Content** > **Browse Folders.**

2. Click the **Add Content** button.

   The Add Content page appears, enabling you to specify the type of content that you want to import to a published feature folder.

3. Select the *Managed Content* option as the content type, and then click the **OK** button.

   The Managed Content search page appears.

   Note: The Select Managed Content page is displayed when accessed from an action item. Other features use a common search page to select Managed Content to import.

4. Enter search criteria to filter the search results.

5. Click the **Search** button.

6. Select the content item that you want to import by clicking the content title.

   The Content Properties page appears with the content item's information. The origin type displays as *Managed Content.*

7. Use the Content Properties page to review content properties such as title, source, and summary; to specify content location; to submit content for publication; and to maintain comments or discussions specific to that piece of content, among other functions.

8. Click the **Submit** button to save your work and submit the content for publication.

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The new content appears in the folder with a status of pending publication. The modified date indicates when the content was approved in the Managed Content feature.

Creating Tiles for Fluid Managed Content

PeopleSoft Interaction Hub has the flexibility to publish fluid managed content as a tile to include it in Fluid homepages. You can associate images, html contents, and videos with the tile.

For more information on creating a tile for Fluid homepage, see the product documentation for PeopleTools: Fluid User Interface Developer’s Guide, “Configuring Tile Options”. For more information on adding a tile to Fluid homepage, see the product documentation for PeopleTools: Applications User's Guide, “Working With Fluid Homepages”, Managing Fluid Homepages.

Pages Used to Create Tiles for Fluid Managed Content

Page Name	***Definition Name***	***Usage***
<Content Type> Attachment Properties Page	EPPCM_CONT_MAIN	To define the folder properties and details for child content.
<Content Type> Properties – Associated Image Page	EPPCM_CONT_IMGADD	To add new or existing image with the content.
<Content Type> Properties – Publish Tile Definition Page	EO_PE_GPLT_PUB	To create or update a tile definition for the content.

<Content Type> Attachment Properties Page

Use the Content Attachment Properties page (EPPCM_CONT_MAIN) to enter content properties such as title, summary, and content location to submit content for publication and to maintain comments or discussions specific to that piece of content, among other functions.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title and click the Add Content button on the Browse Managed Content page.

Select a content type from the drop-down list and click the OK button.

Note: The name that appears on this page depends on the content type that you selected on the Browse Managed Content – Add Content page.

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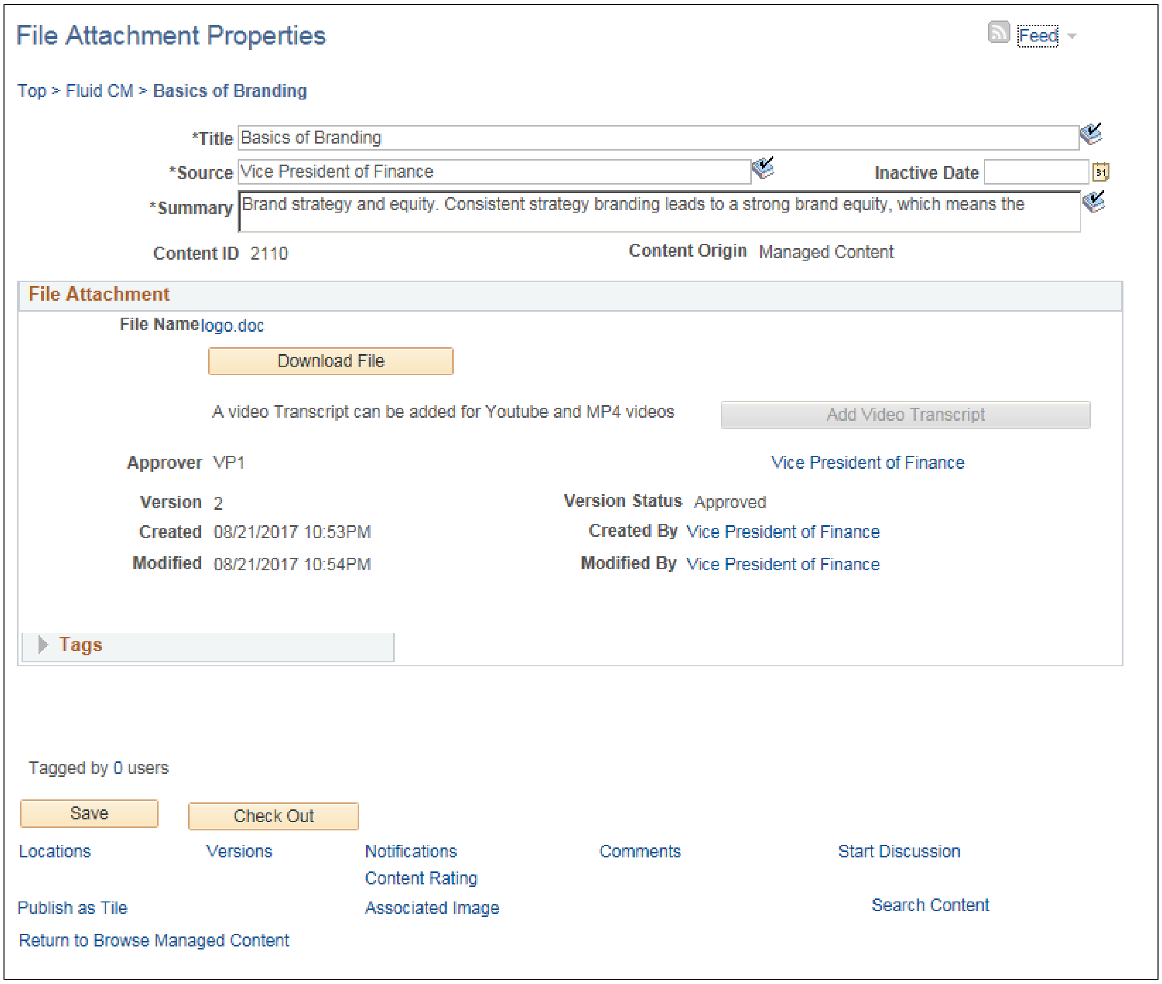
This example illustrates the fields and controls on the File Attachment Properties page with the File Attachment option selected in the Browse Managed Content – Add Content page. You can find definitions for the fields and controls later on this page.



For details on fields and explanations, see Adding a Piece of Managed Content

<Content Type> Properties – Associated Image Page

Use <Content Type> Properties – Associated Image page (EPPCM_CONT_IMGADD) to associate an image with the content.

Navigation:

Click the Associated Image link displayed on the <Content Type> Properties – Associated Image page.

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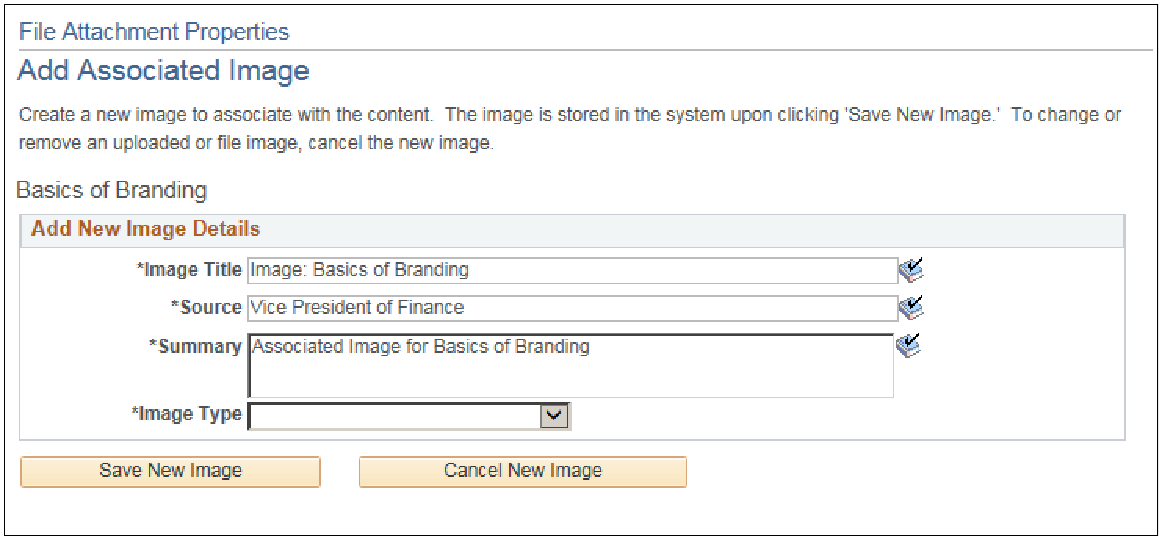
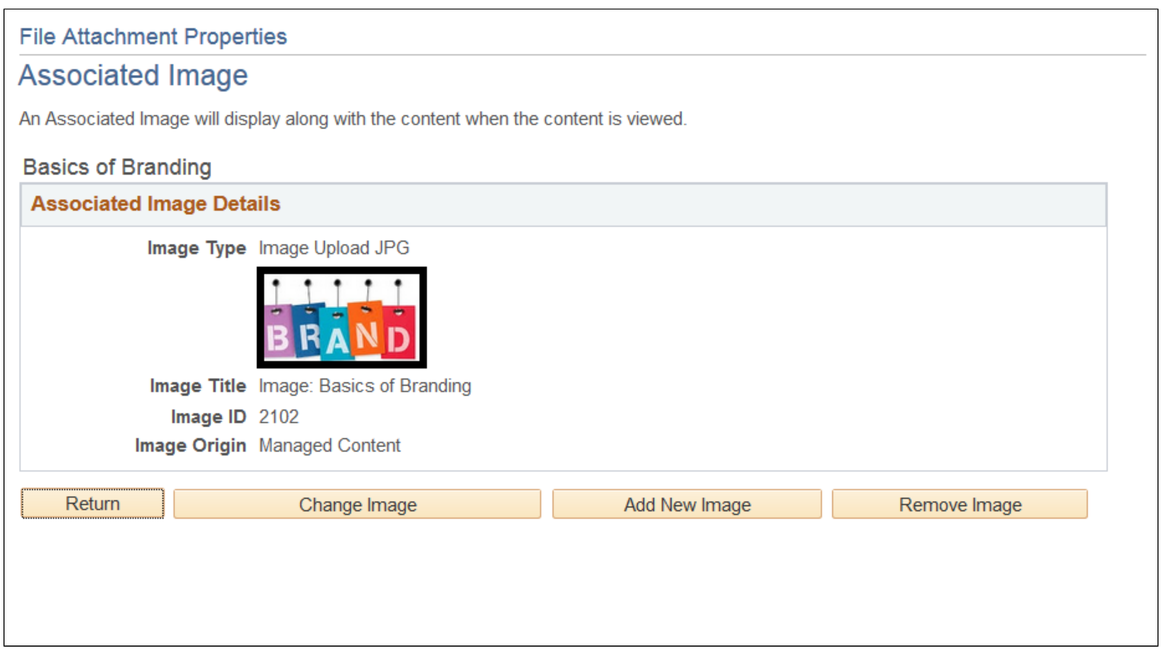
This example illustrates the fields and controls on the <Content Type> Properties – Associated Image page.



For details on fields and explanations, see Associating Images with News Articles

After uploading an image (here, logo image uploaded for Basics of Branding scenario), the screen is displayed as shown.

This example illustrates the fields and controls on the <Content Type> Properties – Associated Image page configured for Basics of Branding scenario.



<Content Type> Properties – Publish Tile Definition Page

The <Content Type> Properties – Publish Tile Definition Page (EO_PE_GPLT_PUB) appears, if you are publishing managed content for the first time as a tile. Use the Publish Tile Definition page to change the Tile Title and move the tile to a different folder before publishing it.

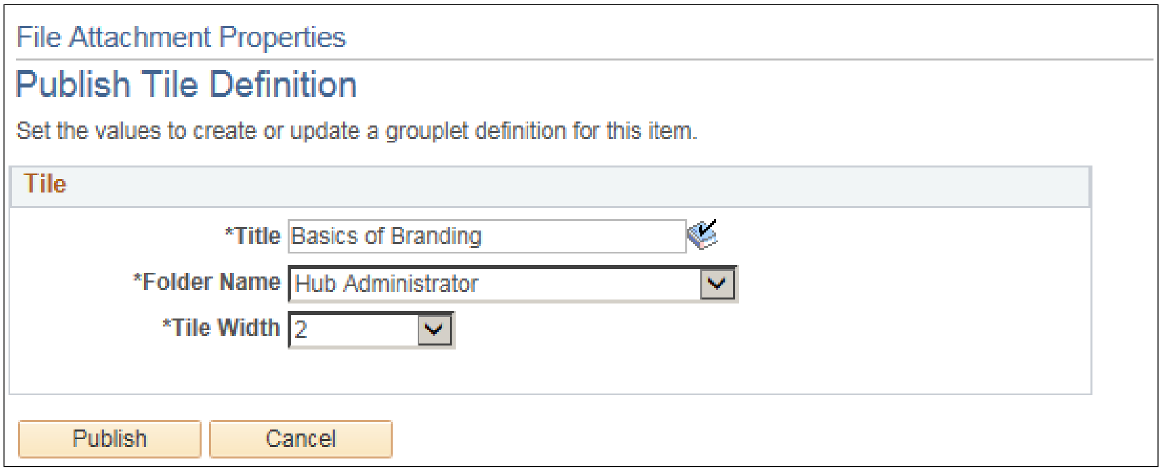
Navigation:

Click the Publish as Tile link displayed on the <Content Type> Properties – Associated Image page.

Note: The Publish as Tile link is available only for approved content. For details on approving contents, see Administering Content Management Business Attribute Security

---

This example illustrates the fields and controls on the Publish as Tile page.



Field or Control	***Description***
Title	Title for the tile is displayed. You can change the title to be different from its original publication name.
Folder Name	Select the required folder to save the tile in it.
Tile Width	Select an appropriate width for the tile. The default dimensions of a tile are 1 tile unit by 1 tile unit.. If you want to publish a 2X1 tile, then select the width as 2.
Publish	Click to publish the tile.

After publishing the tile definition, you can edit the content definition as per requirement. Click Return. This displays the <Content Type> Attachment Properties page. Save the changes.

Adding Managed Content as a Tile in Fluid Homepages

To add managed content as a tile in fluid homepages, perform the following:

1. Configure the content type properties, associate image or video, and publish the tile definition.

2. Navigate to the desired homepage.

3. From the Action menu, select Personalize.

4. In personalization mode, press Add Tile.

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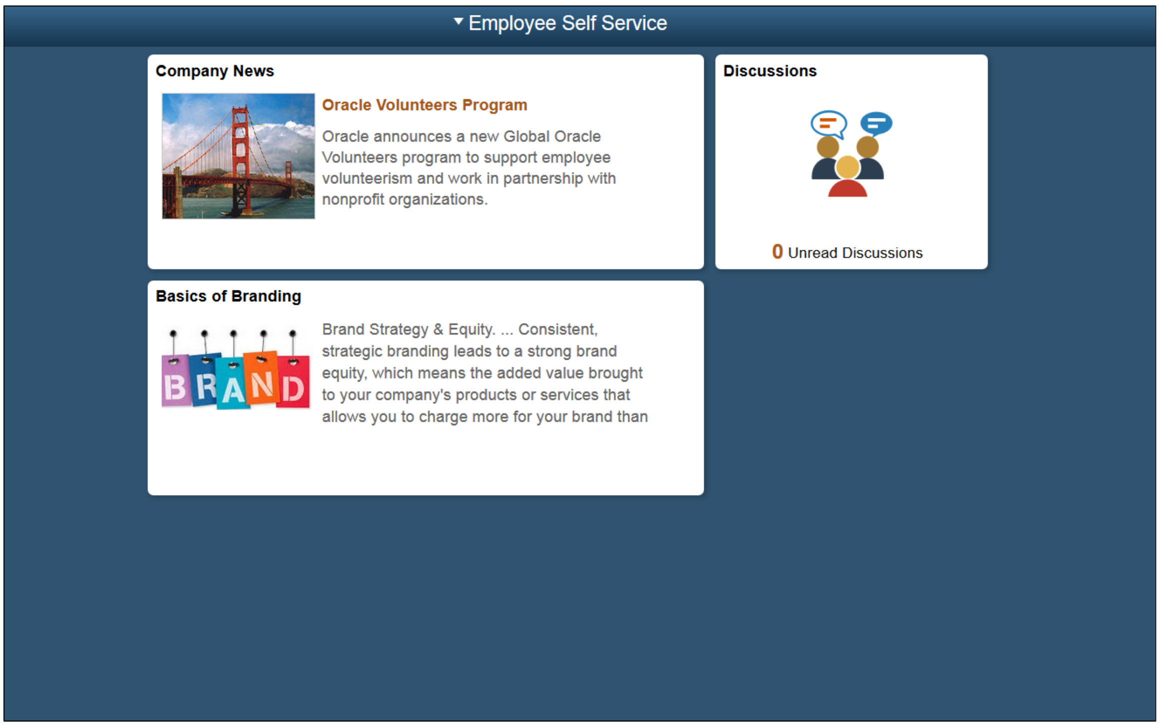
5. Navigate to the desired transaction in the Add Tile dialog box. You have these options:

    - You have these options: Enter the name or partial name of the content reference in the search box, and click Go.
    - Manually navigate through the folders to select the desired content reference.

6. Press Save on the Personalize page.
7. The managed content tile is displayed on the homepage as shown:

    Managed Content tile

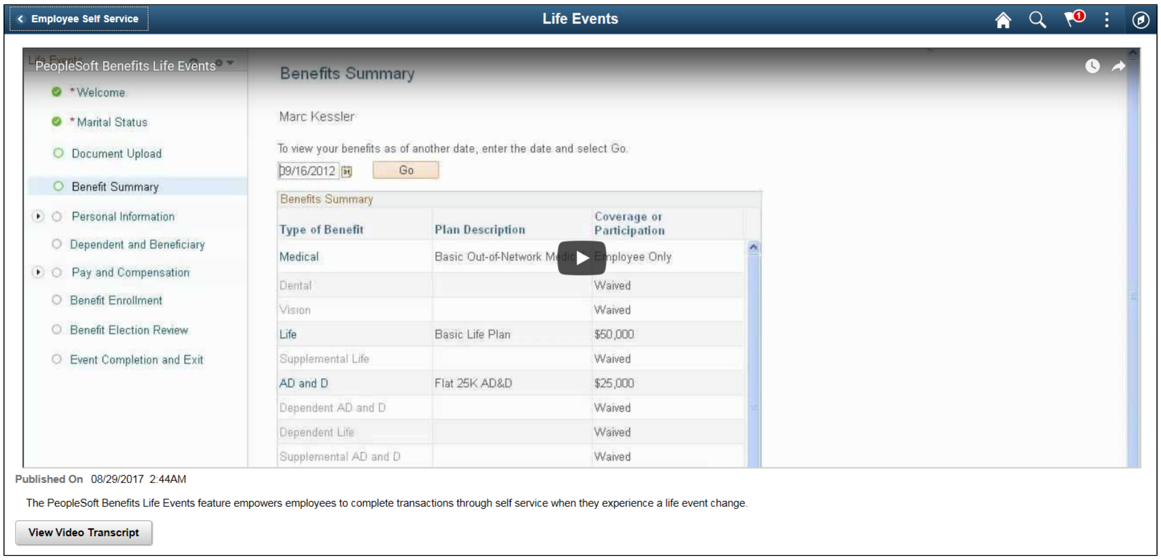


If you attach a youtube URL or a video, and click on the tile, the page is displayed as shown.

Note: Supported file types are listed below:
MP4 = MPEG 4 files with H264 video codec and AAC audio codec

Note: You can play video and watch it from the homepage itself.

Life Events Video Page



Field or Control	***Description***
View Video Transcript button	The View Video Transcript provides a transcript for the video which is helpful for the accessibility users. By clicking on this button, you can view the associated video transcripts.

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Chapter 5

Setting Up and Working with Categorized Content

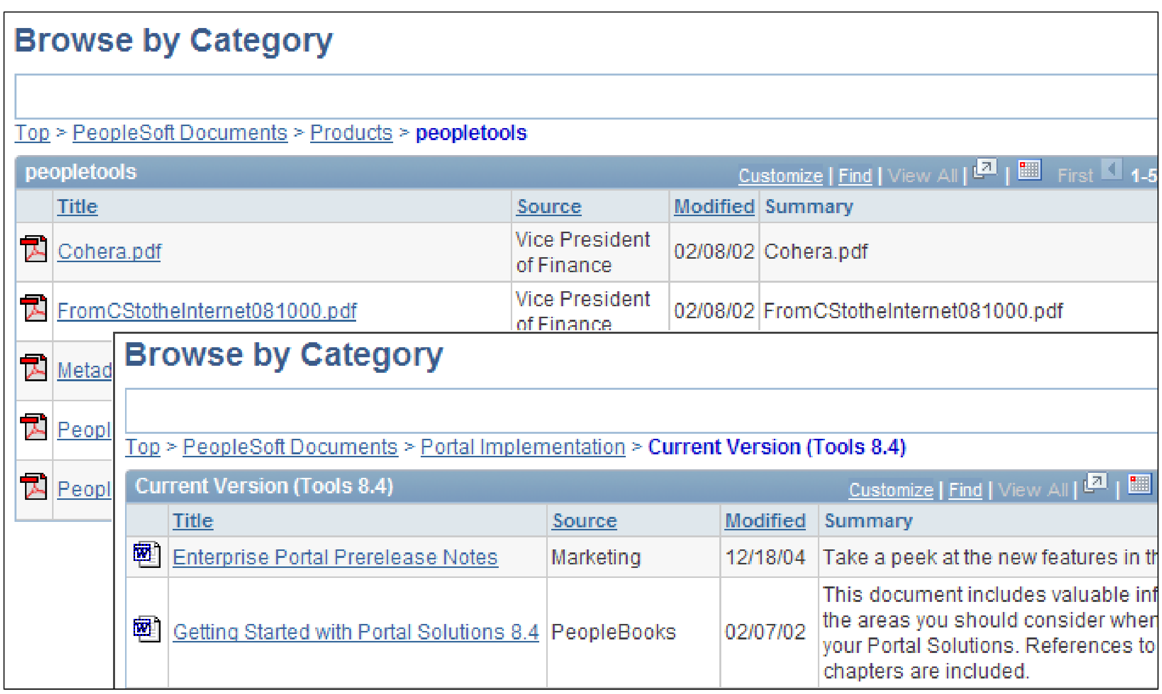
Understanding Categorized Content

The Categorized Content feature of the content management system enables you to categorize data originating from many sources. You can incorporate content from file servers and web servers together with manually added entries and place them in the categorized content hierarchy. Users then search this folder hierarchy to locate relevant documents. By granting access to the folders, you control which users, by user ID or role, can edit, publish, and view data.

Folder administrators and content authors can populate the hierarchy manually. But, you can also import content in bulk. Using the content categorization spider that crawls through collections of documents on file servers and websites, you can automatically update your portal with the information that you consider pertinent. You control the crawler, telling it what type of content to retrieve, where to look, and how much information to recall. Using Process Scheduler to refresh folders, you can keep your information current by the day, or even hour.

The following figure shows the Browse by Category page plus an inset of another Browse by Category page with categorized content incorporated from several sources including the content from Marketing and PeopleBooks:

This example illustrates the fields and controls on the Browse by Category page with an inset of another Browse by Category page.



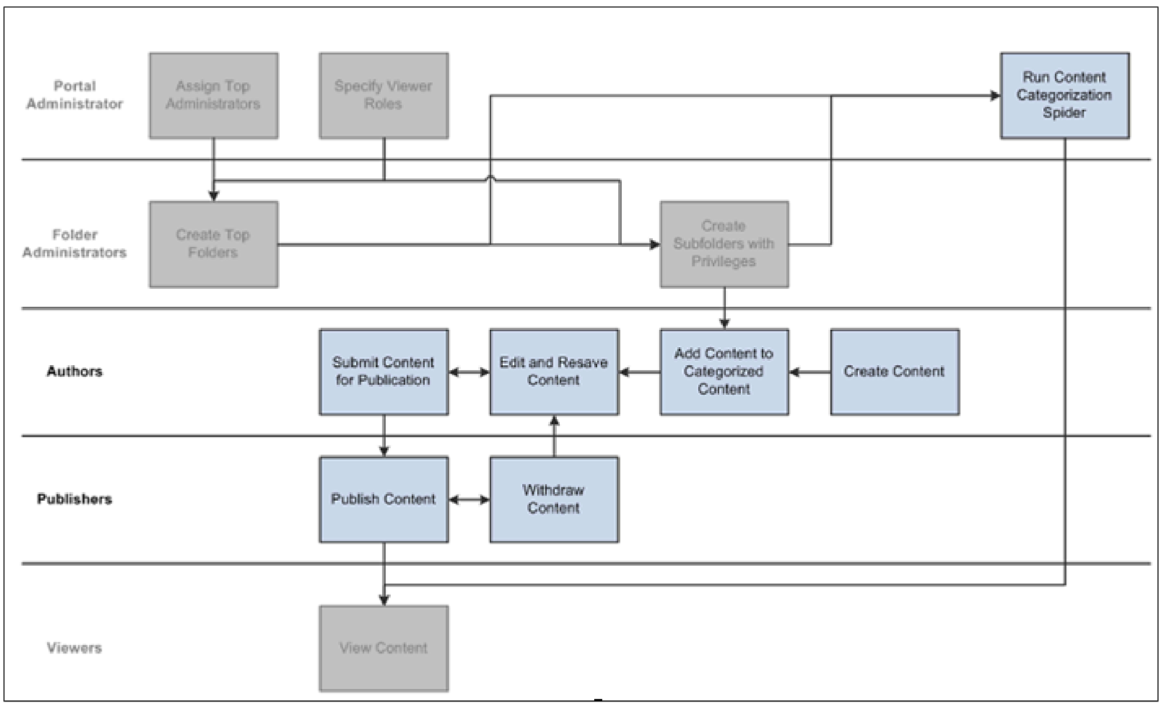
Creating Categorized Content

You can create categorized content in two ways: manually and automatically with the content categorization spider. The manual method consists of these high-level steps:

1. Create top folders and subfolders in the categorized content feature (folder administrators).
2. Assign members with specific privileges for the folders.

   Also, assign viewer roles for viewing published content in these folders (folder administrators).
3. Create and save content in these folders (authors).
4. Submit content for publication (authors).
5. Review submitted content and publish individual content items (publishers).
6. Browse by category to retrieve published categorized content (viewers).

The example illustrates these steps for creating and publishing categorized content.



See *PeopleTools: PeopleSoft Process Scheduler* for more information about

Related Links

Understanding Categorized Content

Managing Folders

This topic discusses ways to maintain folder properties and update folder security for categorized content. It also provides information on assigning member privileges, selecting folder data sources and publishing categorized content folders.

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Pages Used to Manage Folders

Page Name	***Definition Name***	***Usage***
Browse Categorized Content	EPPCM_HIERTOP_MAIN	Create hierarchies for classification and navigation.
Folder Properties Page	EPPCM_CATG_MAIN	Set the properties for a new folder or to update property details for an existing folder. The Folder Properties page is used for top folders as well as for subfolders.
Top Folder Properties - Advanced Feed Options	EPPCM_FEED_ADVOPT	Set up advanced options to publish a folder in the content management system so that it is accessible as a feed. The **Publish as Feed** link is available on all folder properties pages if the folder can be published and you have permissions to publish the folder. See Publications Properties - Advanced Feed Options Page for more information.
Folder Security Page	EPPCM_CATG_MEM	Add the administrators who can edit this folder and the users who can view the folder and its content. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.
Folder Security - Set Members Privileges Page	EPPCM_CATG_PRIV	Assign privilege sets to the selected member.
Folder Properties - Move Folder Page	EPPCM_CATG_TREEMOD	Change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature.
Move Content Page	EPPCM_CONT_TREEMOD	Move content to a new folder.
Content Source Page	EPPCM_CATG_SPIDR	Select folder data sources. Information on this page is required only if you are going to use the categorization spider to automatically create folders and add content.

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Folder Properties Page

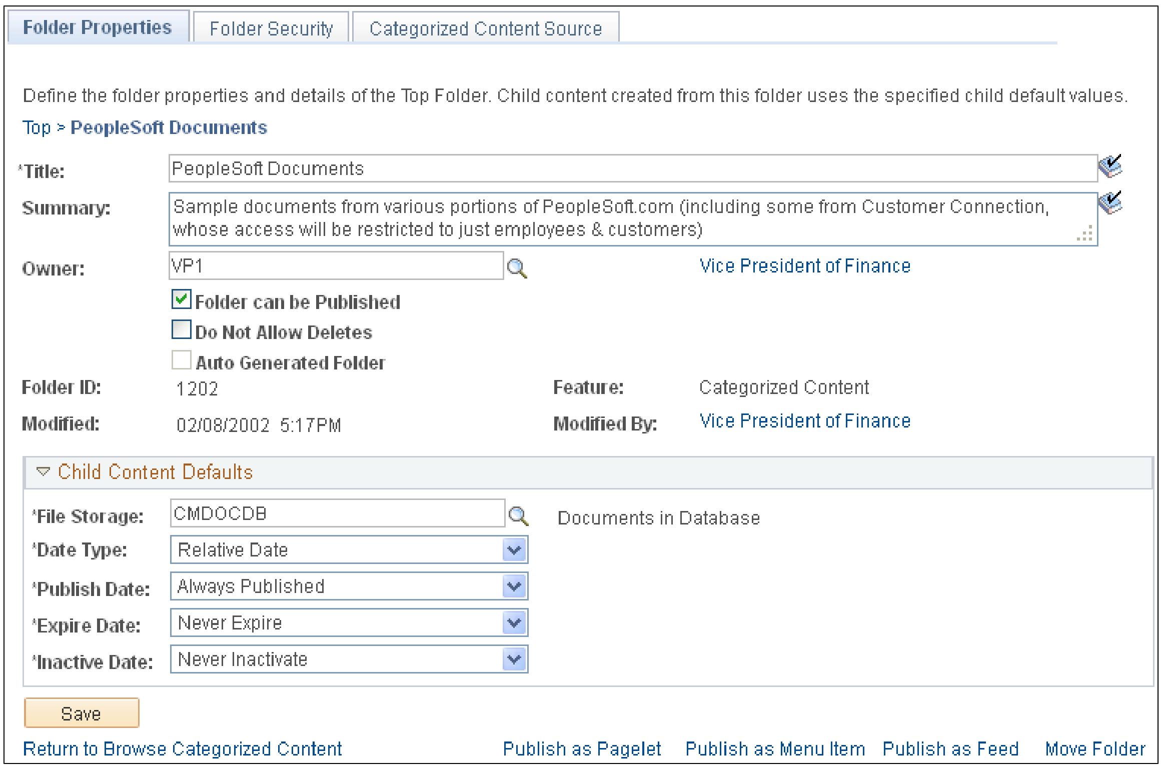
Use the Folder Properties page (EPPCM_CATG_MAIN) to set the properties for a new folder or to update property details for an existing folder.

Navigation:

Content Management > **Categorized Content** > **Browse Folders**

Click the **Properties** link for the folder that you want to access on the Browse Categorized Content page.

This example illustrates the fields and controls on the Folder Properties page. You can find definitions for the fields and controls later on this page.



Users can add folders or update properties at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders or update properties.

Field or Control	***Description***
Summary	Add a brief description of the content. This field supports HTML entries.
Owner	Assign the owner of the folder. Click the name link of the owner to access the Instant Message page, where you can send an instant message to the owner.

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Field or Control	*Description*
Folder can be Published	Select to allow for publishing of this folder as a pagelet or menu item. Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the **Publish as Pagelet, Publish as Feed,** and **Publish as Menu Item** links.
Do Not Allow Deletes	Select to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.
Auto Generated Folder	Indicates whether this folder was created manually or by the spider process.
Publish as Pagelet	Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the PeopleSoft Content Management system as a pagelet. **Note:** This link is available only when the **Folder can be Published** option is selected. See Publishing a Folder or Content Item as a Pagelet.
Publish as Menu Item	Click to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it's accessible as a link in the left navigation menu. **Note:** This link is available only when the **Folder can be Published** option is selected. See Folder Properties - Publish as Menu Item Page.
Publish as Feed	Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed. **Note:** This link is available only when the **Folder can be Published** option is selected. See Top Folder Properties - Advanced Feed Options Page.
Move Folder	Click to access the Top Folder Properties - Move Folder page, where you can change the location of this folder. See Top Folder Properties - Move Folder Page.

Child Content Defaults

Child content created from this folder uses the default values specified here.

Field or Control	***Description***
File Storage	Select the storage locations for any content that is attached files. Available locations are based on those defined on the Define File Storage page. See File Storage Page.
Date Type	Select either *Relative Date* or *Absolute Date* to define content default publish and expiration dates for this folder.
Publish Date	Select the publish date for the default values of the content in this folder.
Expire Date	Select the expiration date for the default values of the content in this folder.
Inactive Date	Select different periods of time as dates when the content will become inactive. You can also select the option to not inactivate the content. Available options are: • *Current Date* • *Current Date + 1 Week* • *Current date + 30 Days* • *Current Date + 90 Days* • *Current Date + 365 Days* • *Current Date +999 days* • *Never Archive*

Folder Security Page

Use the Folder Security page (EPPCM_CATG_MEM) to used to manage the folder members and their privileges.

This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

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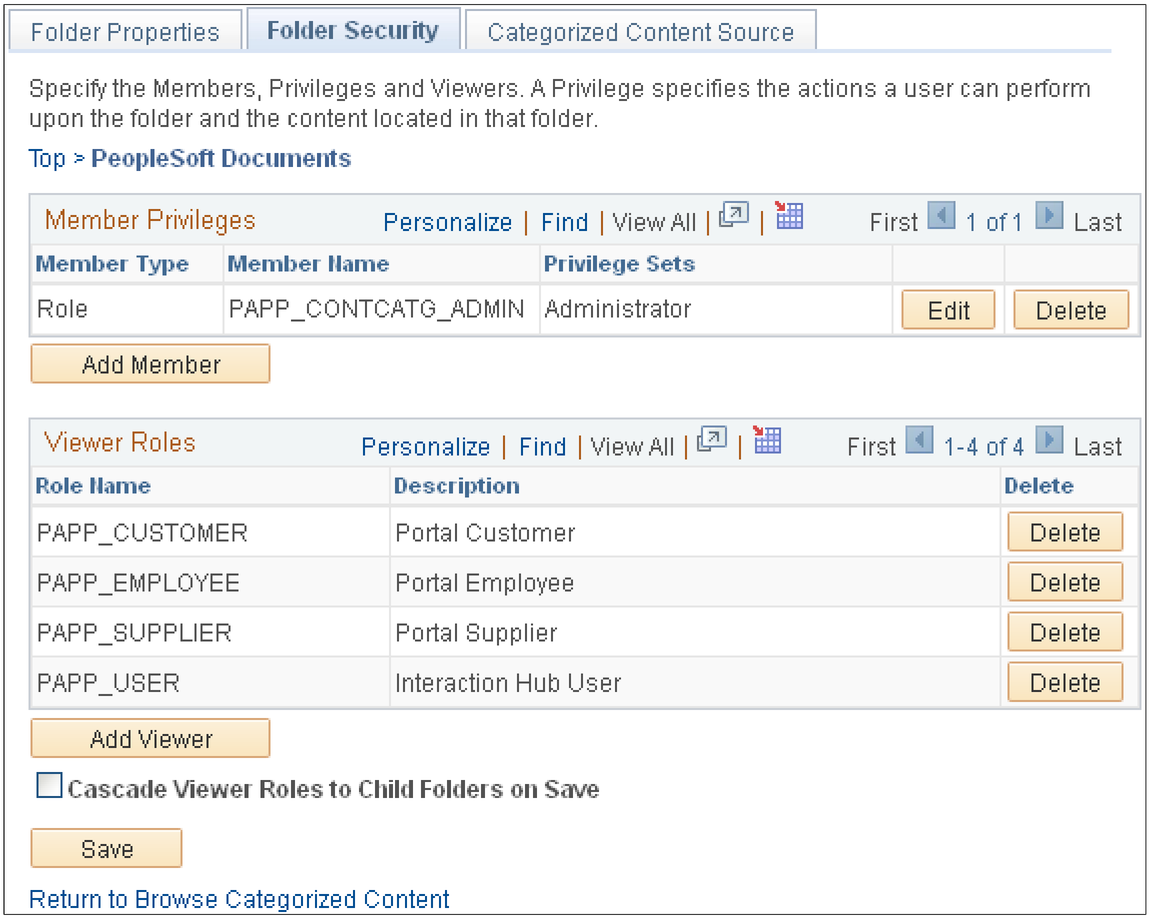
Click the **Properties** link on the Browse Managed Content page.

Select the Folder Security tab on the Folder Properties page.

This example illustrates the fields and controls on the Folder Security page. You can find definitions for the fields and controls later on this page.



A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

The Folder Security page is also used to manage the audiences allowed to view the published content of categorized content folders. These viewing audiences are similar to the viewer roles defined on the Viewer Roles page. Within categorized content, the folder administrator should try to choose among the same limited set of roles.

Note: A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member a folder.

Field or Control	***Description***
Member Privileges	Displays type, name, and privilege sets for the members of the folder. Privileges specify the actions that a member can perform on the folder and the content contained in this folder. **Note:** A viewer member privilege defined in the Member Privileges section of the page is not equivalent to a viewer role defined in the Viewer Roles section of the page, even if the same role ID is used. In the case of the former, a viewer member privilege allows that member to view the folder and all of its contents (in draft, pending, or published states) through the folder hierarchy. The latter allows users with that role to view published content only and only through the Browse by Category page.
Edit	Click to edit privileges of this member.
Delete	Click to remove the member and prohibit him or her from accessing content from this folder.
Add Member	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions that they can perform on the folder and the content located in that folder. See Folder Security - Set Members Privileges Page.
Inherit Members	Click to inherit members from the parent folder.
Viewer Roles	Displays name and description for viewer roles. The viewer roles: • Determine the security for viewing the published categorized content within this folder from the Browse by Category page or the hierarchy viewer pages when the folder is published as a menu item or published as a pagelet. • Determine the search results of the categorized content when the viewer is using the search in the portal header. • Have no bearing on securing the folders within management of the Categorized Content feature. **Note:** When you are publishing folders with security roles, folders are published based on your defined viewer roles rather than member privileges.
Add Viewer	Click to add another row and select a user role to add to the list.

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Field or Control	*Description*
Inherit Viewers	Click to add viewers from the parent folder.
Cascade Viewer Roles to Child Folder on Save	Select to add these roles to all child folders that you have access to when you save this folder. **Note:** If this process encounters a child folder that you do not have privileges for, the cascading of viewer roles stops at that folder and does not continue to the child folders that follow. Changes to viewer roles can be cascaded to subfolders; however, changes to member privileges must be updated in the subfolders manually.

Folder Security - Set Members Privileges Page

Use the Folder Security - Set Members Privileges page (EPPCM_CATG_PRIV) to assign privilege sets to the selected member.

Navigation:

Content Management > **Categorized Content** > **Browse Folders**

Click the **Add Top Folder** button, and click the **Properties** link.

Select the Folder Security tab on the Folder Properties page.

Click the **Edit** button on the Folder Security page.

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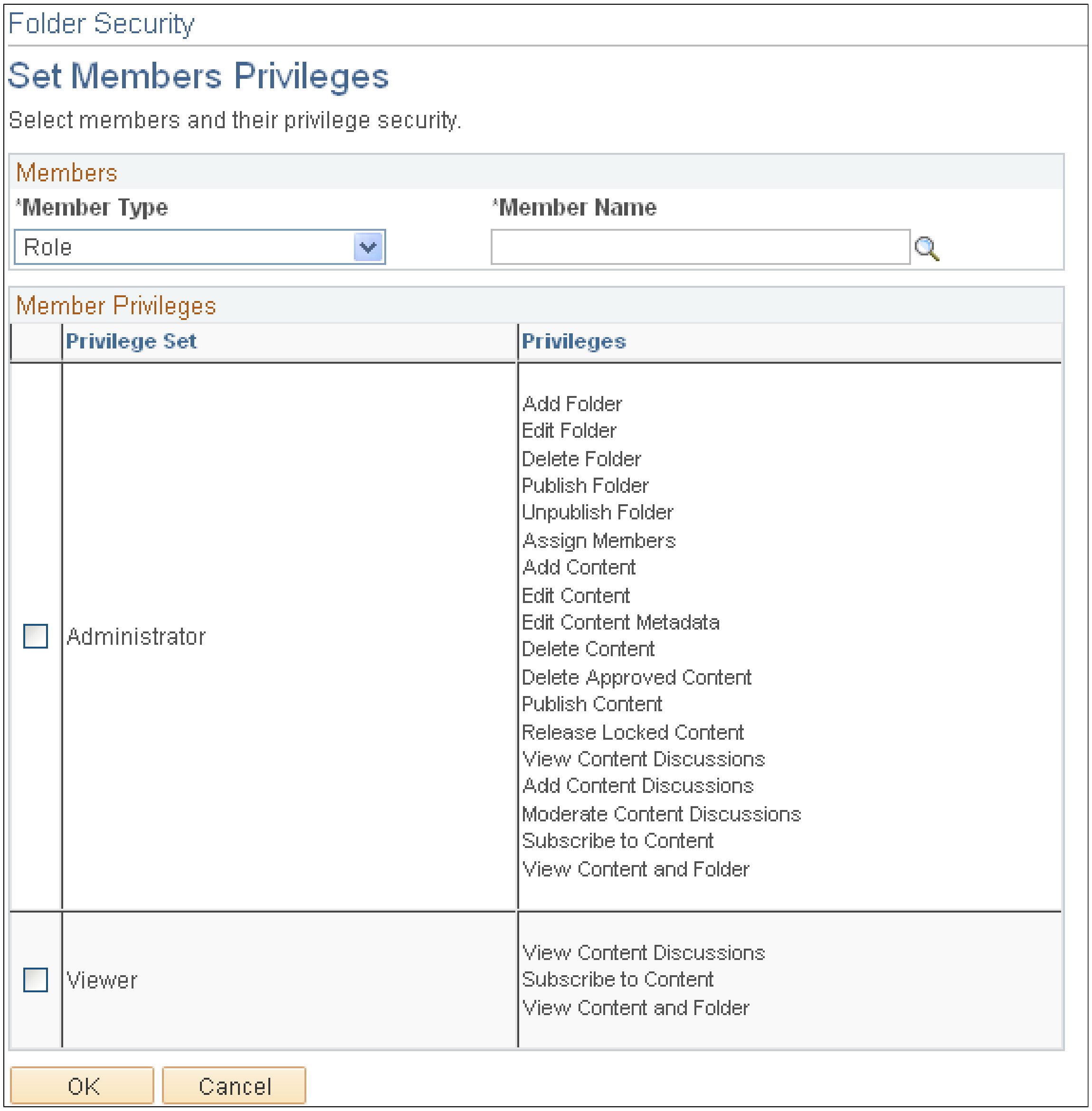
This example illustrates the fields and controls on the Folder Security - Set Members Privileges page: Categorized Content.



Field or Control	***Description***
Member Type	Select a membership type of *User* or *Role.*
Member Name	Select a member name.
Privilege Set	Assign privileges to this member by selecting privilege sets. **Note:** The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Categorized Content feature.

See Privilege Sets Page.

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Folder Properties - Move Folder Page

Use the Folder Properties - Move Folder page (EPPCM_CATG_TREEMOD) to change the location of a subfolder.

If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature.

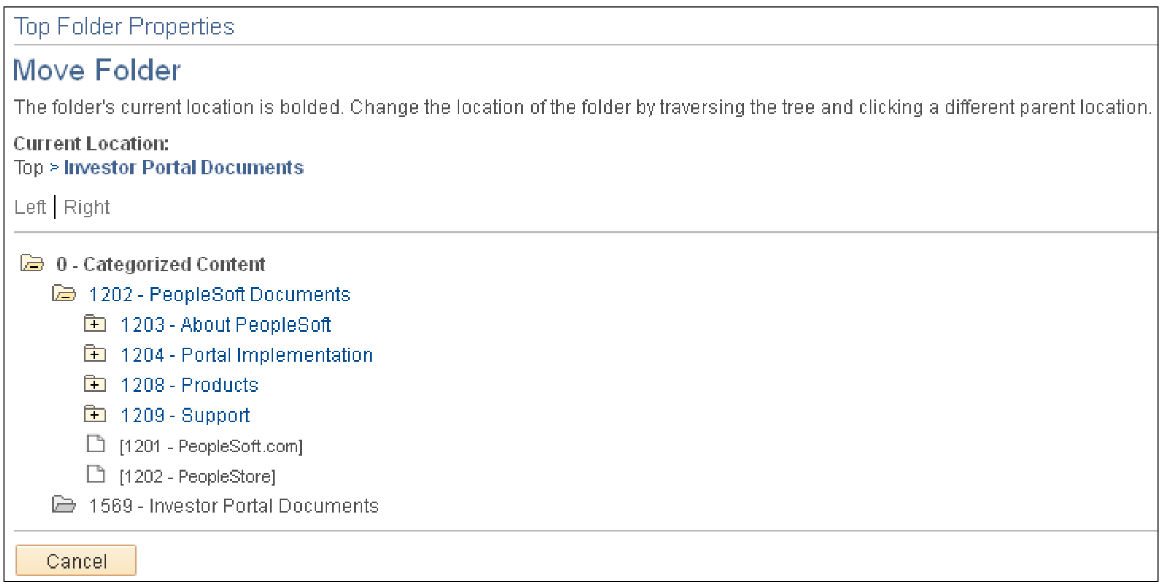
Navigation:

Content Management > **Categorized Content** > **Browse Folders**

Click the **Add Top Folder** button, and click the **Properties** link.

Click the **Move Folder** link on the Folder Properties page.

This example illustrates the fields and controls on the Folder Properties - Move Folder page.



Use this page to move a folder to a different parent folder. The folder in bold type represents the folder's current location. Only top administrators can move a folder to the top folder position. To do so, select the *0–Categorized Content* location. Auto-generated folders cannot be moved.

Navigate the tree by clicking the folders. Select a new location from the available values. These values are based on your privileges. You must have the *Delete Folder* privilege in the current location, as well as *Add Folder* privileges on the new parent location to move a folder.

Folder Properties Page

In the Folder Properties page (select **Content Management** > **Categorized Content** > **Browse Folders;** click the **Properties** link), the **Folder can be Published** option enables approved content to be imported and published in features outside of categorized content. You must select this option for publishing features to import or reference categorized content. In addition, the **Folder can be Published** option enables you to publish this folder as a pagelet, menu item, or feed.

Note: Even with the **Folder can be Published** option selected, only users with the Publish Folder or Unpublish Folder privilege will see the **Publish as Pagelet, Publish as Menu Item,** or **Publish as Feed** link.

Field or Control	***Description***
Publish as Pagelet	Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet. **Note:** This link is available only when the **Folder can be Published** option is selected. See Publishing a Folder or Content Item as a Pagelet.
Publish as Menu Item	Click to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it's accessible as a link in the left navigation menu. **Note:** This link is available only when the **Folder can be Published** option is selected. See Folder Properties - Publish as Menu Item Page.
Publish as Feed	Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed. **Note:** This link is available only when the **Folder can be Published** option is selected. See Top Folder Properties - Advanced Feed Options Page.

Related Links

Folder Properties Page

Content Source Page

Use the Content Source page (EPPCM_CATG_SPIDR) to select folder data sources.

Navigation:

Content Management > **Categorized Content** > **Browse Folders**

Click the **Add Top Folder** button, and click the **Properties** link.

Click the Content Source tab on the Folder Properties page.

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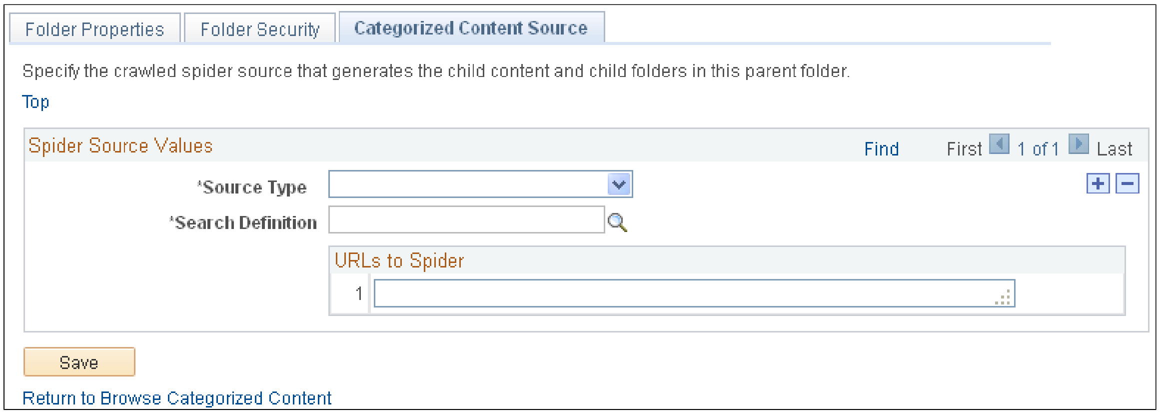
This example illustrates the fields and controls on the Content Source page.



Note: Values on this page are required only if you use the categorization spider to automatically create folders and add content.

See Understanding the Content Categorization Process.

Adding Categorized Content Manually

This section provides an overview of adding categorized content and discusses how to add new categorized content.

Pages Used to Add Categorized Content Manually

Page Name	***Definition Name***	***Usage***
Browse Categorized Content - Add Content Page	EPPCM_ADDCONT_SEC	Specify the type of content that you want to add to a folder in categorized content.
Categorized Content Properties Page	EPPCM_CONT_MAIN	Enter content properties such as title, summary, and content location; submit content for publication; and maintain comments or discussions specific to that piece of content, among other functions. The name of this page and its fields that appear depend on the content type that you selected on the Browse Categorized Content - Add Content page.
Content Locations Page	EPPCM_CONT_LOC	Move content to a different folder or add content to multiple folders.
Add Content Locations Page	EPPCM_CONT_TREEADD	Select new locations for the content.

Page Name	***Definition Name***	***Usage***
Move Content	EPPCM_CONT_TREEMOD	Move content to a different folder.
Post Details Page	EPPDF_VIEW_TOPIC	Start a new discussion or edit an existing discussion for this content item. See Starting and Viewing Discussions, Post Details Page section.
Edit a Post Page Add a Reply Page	EPPDF_REPLY_TOPIC	Edit an existing discussion or respond to a discussion. See Starting and Viewing Discussions, Edit a Page and Add a Reply Page section.
Content Notification	EPPCM_CONT_NTFY	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Enter any additional comments about this content item.

Understanding Adding Categorized Content

Using the Categorized Content navigation menu item **Browse Folders,** you can navigate through the hierarchy and manually add folders and content. You can also edit the attributes of manually added folders and content, as well as add menu items and import managed content.

Related Links

Importing Managed Content into Other Features
Adding a Piece of Managed Content

Browse Categorized Content - Add Content Page

Use the Browse Categorized Content - Add Content page (EPPCM_ADDCONT_SEC) to specify the type of content that you want to add to a folder in categorized content.

Navigation:

Content Management > **Content Categorization** > **Browse Folders**

Click a title link in the Browse Categorized Content page, and click the **Add Content** button on the Content Properties page.

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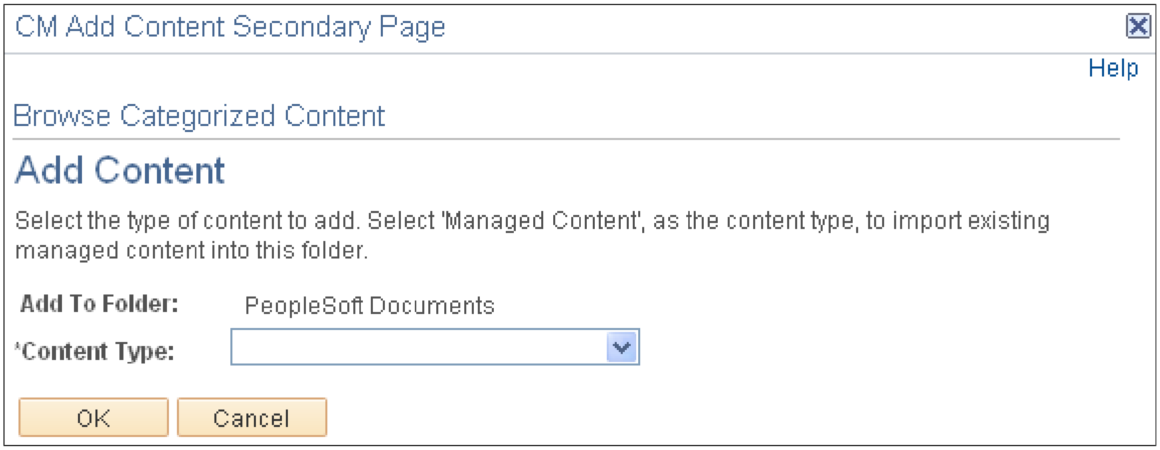
This example illustrates the fields and controls on the Browse Categorized Content - Add Content page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Content Type	Select a content type. Available options are: • *Menu Item*: Select portal registry content references. Menu Items are pages, websites, or files accessible from the navigation menu. • *File Attachment*: Upload files into Content Management. • *Text or HTML*: Use HTML or text to be rendered as HTML. • *Image Attachment*: Upload an image file. • *Image URL*: Upload a web-enabled image file URL. • *Web Site URL*: Enter a web URL. • *Managed Content*: Select existing managed content.
OK	After you select a content type and click this button, a Categorized Content Properties page appears based on the content type you selected. When content is added to managed content, its status is set to checked out.

Categorized Content Properties Page

Use the Categorized Content Properties page (EPPCM_CONT_MAIN) to enter content properties such as title, summary, and content location; submit content for publication; and maintain comments or discussions specific to that piece of content, among other functions.

Navigation:

Click the **Add Content** button on the Browse Categorized Content page.

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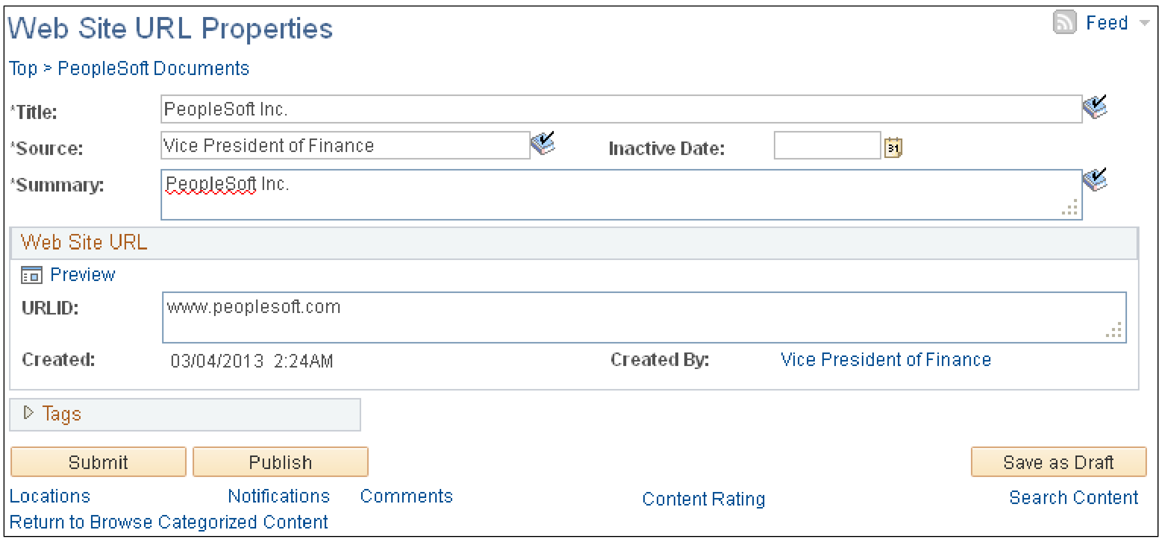
Select the type of content to add, and then click **OK** on the Add Content page.

Note: The name that appears on this page depends on the content type that you selected on the Browse Categorized Content - Add Content page.

This example shows the Web Site URL Properties page with the Web Site URL option selected in the Browse Categorized Content - Add Content page:

This example illustrates the fields and controls on the Categorized Content - Web Site URL Properties page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Menu Item	Use the search icon to select an approved menu item.
Save as Draft	Click to save this content item in draft format. You can continue to edit the content property fields for this item. Content in draft status does not appear on the Browse by Category page because it is not published.
Publish	Click to save and publish this content item. All fields become read-only. Published content appears on the Browse by Category page to users who have the viewer roles for the parent folder where the content is located.
Unpublish	Click to save the content and save it to Pending Publishing. Nonpublished content does not appear on the Browse by Category page.
Locations	Click to set the publish and expiration date for the content in this location and set the item to be published.

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Field or Control	***Description***
Notifications	Click to create a list of interested parties or send email notifications of saved content to the list of interested parties.
Save	Click to save the content item without changing the publish status.
Submit	Click to save and submit the content item for publishing.
Comments	Click to add additional comments about this content item.
Search Content	Click to search existing content within the Categorized Content feature.
Start Discussions	Click to begin a discussion topic. **Note:** Discussion topics stay with the content item and cannot be accessed outside of the Content Properties page.
View Discussions	This link is available if the discussion topic already exists for this content item. Click to view, edit, or enter a response to a discussion.

Translating Content Management HTML/Text Content

To translate Content Management HTML/Text content, you must translate the same content version into the various languages you want to display. This means that you must save the content version as a draft, and translate it for each appropriate language. Check in or submit the content version *after* it is translated for all appropriate languages.

If content is being translated into one or more foreign languages, perform the language translations on the content after the content is checked out. When all translations are completed, you can check content in.

Note: Content comments are not translated. You will see the comments from the language that you entered last.

Managing Categorized Content

This section discusses ways to edit, view categorized content and steps to approve content items. It also discusses steps to start and view discussions, create and use tag, and select content locations.

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Pages Used to Manage Categorized Content

Page Name	***Definition Name***	***Usage***
My Categorized Content Page	EPPCM_USER_MAIN	View and edit all of your categorized content.
Content Properties	EPPCM_CONT_MAIN	Manage the content.
Content Versions	EPPCM_CONT_VER	Review, delete, or check out different versions for a specific content item.
Content Locations Page	EPPCM_CONT_LOC	View information about the folders in which the content is published. From this page, you can move content to a new folder on the Move Content page, and specify additional folders in which the content is available on the Add Content Locations page. Specifying an additional location does not create another copy of the content; instead, it creates a link so that only one instance of the content is present within managed content.
Add Content Location Page	EPPCM_CONT_TREEADD	Select an additional location for the content.
Start Discussion Confirmation Page	EO_PE_YESNOCONFIRM	Use to confirm the start of a discussion on this piece of content.
Post Details Page	EPPDF_VIEW_TOPIC	Use to start a new discussion, edit an existing discussion, or view an existing discussion for a content item. From the Post Details page, you can edit the existing discussion, delete the discussion entirely, and add a reply, among other tasks. See Starting and Viewing Discussions for details on this page.
Discussion Page	EPPDF_REPLY_TOPIC	Enter or edit a discussion topic. See Starting and Viewing Discussions for details on this page.
Edit a Post Page Add a Reply Page	EPPDF_REPLY_TOPIC	Edit an existing discussion or respond to a discussion. See Starting and Viewing Discussions for details on this page.

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Page Name	***Definition Name***	***Usage***
My Categorized Content Status Page	EPPCM_STAT_MAIN	View, at a glance, the work that you need to perform based on the status of categorized content.
Content Notification Page	EPPCM_CONT_NTFY	Send email notifications of saved content to the list of interested parties.
Comments Page	EPPCM_CONTCOMM_SEC	Enter any additional comments about this content item.

My Categorized Content Page

Use the My Categorized Content page (EPPCM_USER_MAIN) to view and edit all of your categorized content.

Navigation:

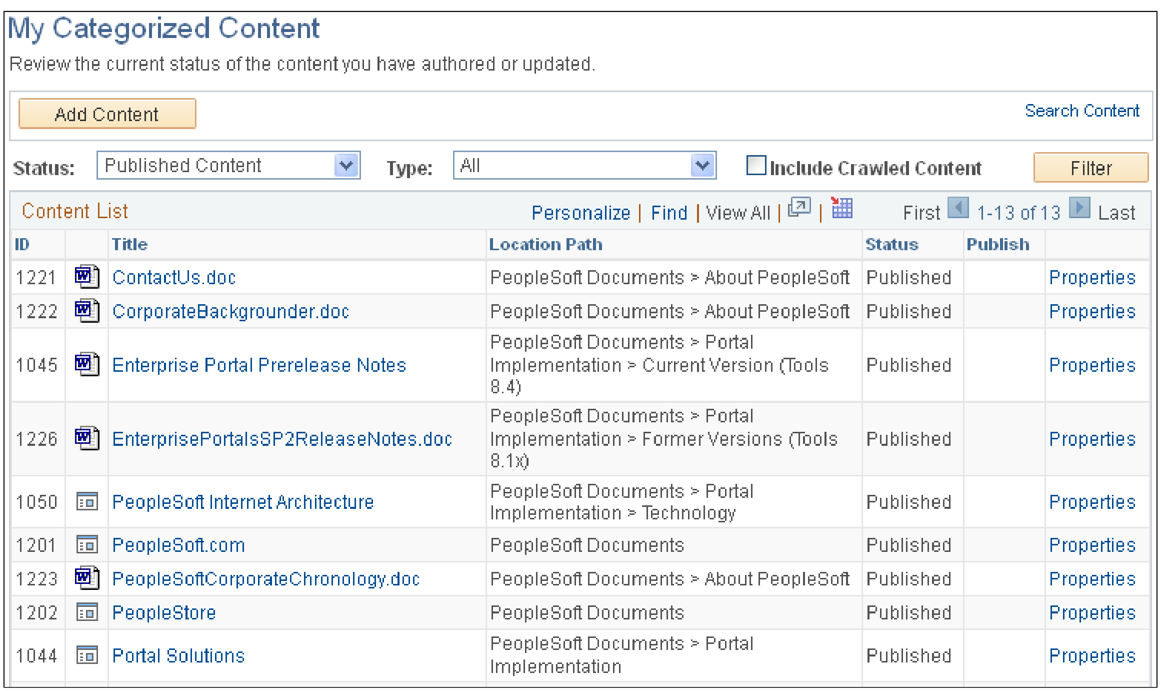
- **Content Management** > **Categorized Content** > **My Content Status**

  Click the **Published Content** link My Categorized Content page.

- **My Content** > **My Categorized Content**

  Click the **Published Content** link My Categorized Content page.

This example illustrates the fields and controls on the My Categorized Content page: Published Content. You can find definitions for the fields and controls later on this page.



Use this page to easily locate and review content items of a particular status. If necessary, you can enter additional search criteria to filter the results.

Field or Control	***Description***
Include Crawled Content	Select to bring up all the auto-generated content that was generated by the current user if that user ran the categorization spider process. The amount of data can be quite large, so use this filter with caution.
Title	Click the title link to preview the item.
Properties	Click to view the property details.

Submitting Content Items for Approval in Categorized Content

You can select an approver at your discretion from the users who have been granted approval privileges for this folder. Before you can submit content items for approval, you must check in the content.

To submit content items for approval:

1. Select **Content Management** > **Categorized Content** > **Browse Folders** > or

   Select **My Content** > **My Managed Content.**

2. Access the File Attachment Properties page.

   Click the **Properties** link on the Browse Categorized Content page or the My Categorized Content page.

3. Select an approver user ID or role.

4. Click the **Save** button, and click the **Check in** buttons.

5. Click the **Submit for Approval** button.

   Note that:

   - The content is automatically checked out and locked to the approver.
   - The fields on the Content Properties page are editable only by the listed approver because the content is checked out to the approver.
   - The **Version Status** and **Locked To** fields have been updated.

     The icon also indicates that the file is locked. When you submit content for approval, it is automatically checked out to the approver by the system.

   - The **Check Out** and **Submit for Approval** buttons disappear. The **Cancel Check Out** button appears.

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Approving Content Items in Categorized Content

You use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check out and check in content and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other tasks.

When you approve an item of categorized content, you make that item available to be reused in other content management features such as News Publications, Managed Content, Collaborative Workspaces, and so on.

To approve a content item:

1. Select **My Content** > **My Managed Content** to access the My Managed Content page to view content items of a particular status, including a list of all content that requires your review and approval.
2. Click the **Properties** link for the desired content on the My Managed Content page.
3. Click the link to review the content.

   For example, if the content is a file attachment, click the file name.
4. Click the **Approve** button if the content is ready to be published.

   Click the **Rework** button if the content requires additional work.

   Notice that the **Modified** and **Version Status** fields have been updated and the locked icon has been removed.

Approved content is now available for publishing.

Content Locations Page

Use the Content Locations page (EPPCM_CONT_LOC) to move content to a different folder or add content to multiple folders.

Navigation:

Content Management > **Content Categorization** > **Browse Folders**

Click the **Add Content** button on the Browse Categorized Content page.

Click the **Locations** link on the Content Properties page.

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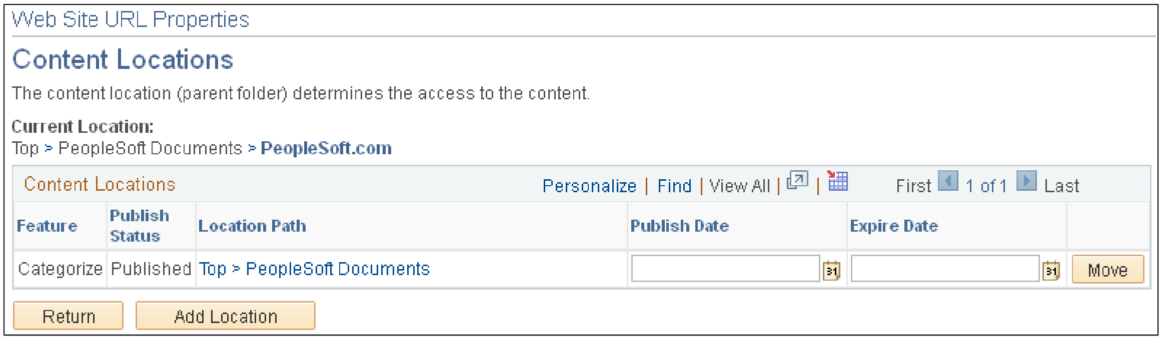
This example illustrates the fields and controls on the Content Locations page. You can find definitions for the fields and controls later on this page.



The Content Locations page in the Categorized Content feature lists all the folders where content is located. When the Content Locations page is accessed from a non-managed feature such as Workspaces or Categorized Content, it shows only the content locations for that feature. You can move content only between folders of the current feature in the current site.

Note: When moving content or adding new locations for the content, be aware that the location (parent folder) determines the access security for the content.

See Top Folder Properties - Move Folder Page.

Field or Control	***Description***
Move	Click to change the current location of the content.
Add Location	Click to add an additional location for this content.

Add Content Location Page

Access the Add Content Location page (select **Content Management** > **Categorized Content** > **Browse Folders;** click a folder title link; click an appropriate **Properties** link and click the **Locations** link; click the **Add Location** button on the Content Locations page).

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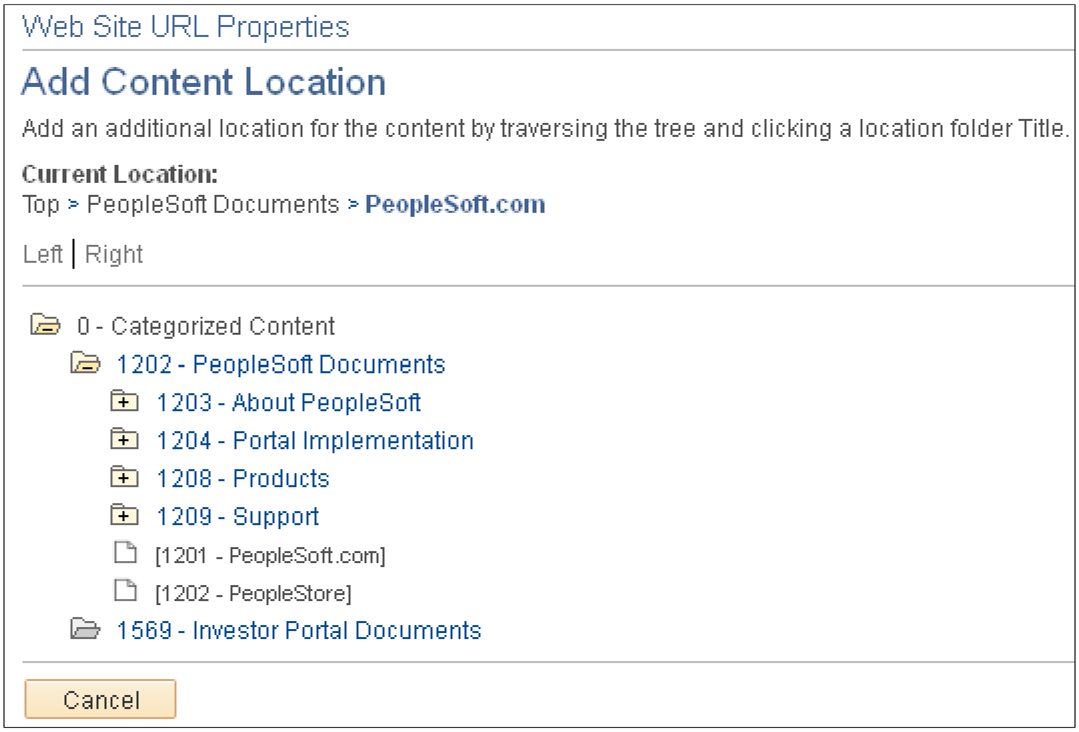
This example illustrates the fields and controls on the Add Content Location page.



To select an additional location for the content:

1. Click the folder icons to navigate through the hierarchies.
2. Select the new location by clicking the folder title.

   The Content Location page appears with the new location listed.
3. Click the **Return** button to return to the Content Properties page.
4. Click the **Save** button.

   The document is now listed in two folders.

Start Discussion Confirmation Page

Use the Start Discussion Confirmation page (EO_PE_YESNOCONFIRM) to use to confirm the start of a discussion on this piece of content.

Navigation:

Content Management > **Managed Content** > **Browse Folders**

Click a folder title link, and click an appropriate **Properties** link.

Click the **Start Discussion** link on the Content Properties page.

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This example illustrates the fields and controls on the Start Discussion Confirmation page.

Use this page to start a discussion, which is then attached to the content item. After a discussion has been started, the link changes to **View Discussions** and is used it to edit, respond to, and view discussions.

Note: These discussions stay with the content item, and can be accessed only from the Categorized Content Properties page.

See Starting and Viewing Discussions.

Related Links

“Understanding Discussion Forums” (Using Portal Features)

Creating and Using Tags in Categorized Content

Tags for categorized content are displayed on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window directly without using the application view page. In these instances, tags are available only on the properties page. Application pages can be displayed in only edit or view mode.

To create and use tags for categorized content:

1. Access the pages by using one of the following navigations:
   a. Select **Content Management** > **Categorized Content** > **Browse Folder.**
   b. Select **My Content** > **My Categorized Content.**
2. Select any content property link.
3. Click an appropriate link to view, edit, or add tags.
4. Enter the tag name, and click the **Update Tags** button.

Note: Security considerations: Users that have access to the content must have the add and view tag permissions. Users that are assigned the Administrator, Author, or Expert roles also are assigned the modify permissions. All users have access to delete their own tags, both public and private. User with Admin privileges can delete all tags in the content, and an Admin user cannot delete the Private tags of other users.

See “Understanding Tagging in PeopleSoft Interaction Hub” (Using Portal Features).

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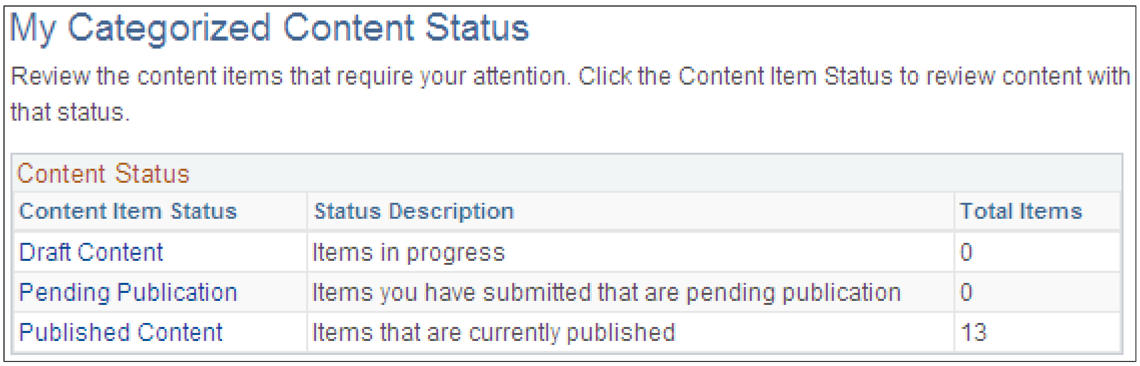
My Categorized Content Status Page

Use the My Categorized Content Status page (EPPCM_STAT_MAIN) to view, at a glance, the work that you need to perform based on the status of categorized content.

Navigation:

- **Content Management** > **Categorized Content** > **My Content Status**
- **My Content** > **My Categorized Content**

This example illustrates the fields and controls on the My Categorized Content Status page. You can find definitions for the fields and controls later on this page.


My Categorized Content Status

Review the content items that require your attention. Click the Content Item Status to review content with that status.

Content Status

Content Item Status	Status Description	Total Items
Draft Content	Items in progress	0
Pending Publication	Items you have submitted that are pending publication	0
Published Content	Items that are currently published	13

The My Categorized Content Status page enables you to see, at a glance, the work that you need to perform based on content status.

Field or Control	***Description***
Content Item Status	Click to access the My Categorized Content page, where you can preview the content items for the selected status, view their property details, or add new content. See My Categorized Content Page.

Note: The total item count does not include any content item that is located in an automatically generated folder, such as crawled content items.

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Chapter 6

Running the Content Categorization Process

Understanding the Content Categorization Process

In Oracle's PeopleSoft Interaction Hub, the categorized content feature of the content management system enables you to incorporate data originating from many sources. You can incorporate content from file servers and web servers together with manually added entries and place them in the content hierarchy. Users then browse this folder hierarchy to locate relevant documents. By granting access to the folders, you control which users—by user ID or role—can edit, publish, and view data.

Folder administrators and content authors can populate the hierarchy manually. But, you can also link to content, using file source or web source search definitions to link to documents from a file server or from a remote website. You can automatically update your portal with the information that you consider pertinent, and retain the information where you deem necessary. You control the crawler, telling it what type of content to retrieve, where to look, and how much information to recall.

Running the Content Categorization Process

This section discusses how to:

- Identify data source folders and files.
- Define a content source by creating a search definition, search category, and deploying the search definition and search category.
- Associate a content source with a folder.
- Run the content categorization process.

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Pages Used to Run the Content Categorization Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Categorized Content Source	EPPCM_CATG_SOURCE	**Content Management** > **Categorized Content** > **Browse Folders** Click a folder title link on the Browse Categorized Content page to navigate through the folder levels. Click a folder **Properties** link or click the **Add Folder** button at the appropriate folder level on the Browse Categorized Content page. Select the Categorized Content Source tab.	Associate an already defined content data source with the selected folder in categorized content.
Categorize Crawled Content	EPPCM_CATG_RUN	**Content Management** > **Categorized Content** > **Categorize Crawled Content**	To read index and build categorized content.
Process Scheduler Request	PRCSRQSTDLG	**Content Management** > **Categorized Content** > **Categorize Crawled Content** Click Run.	To run the content categorization Application Engine process.

Identifying Data Source Folders and Files

PeopleSoft Interaction Hub is integrated with Oracle search engine, so search definitions are used to specify exactly what is crawled.

Oracle search engine can crawl files or directories located on the server where search engine is installed or network file paths accessible by the server. Also, search engine can crawl a web server.

Before running the Application Engine process, you should become familiar with the folder hierarchy and documents available on the source system. You will want to examine the source system to determine:

- The root folder in which to begin the crawl.
- The depth to which you want the crawler to crawl.
- The type of documents you want to retrieve.

See the product documentation for *PeopleTools: Search Technology*, “Creating File Source Search Definitions,” Specifying File Source General Settings.

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See the product documentation for *PeopleTools: Search Technology*, “Creating Web Source Search Definitions,” Specifying Web Source General Settings.

The Oracle default document types for crawling are:

- PDF
- HTML
- TXT (plain text)
- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint

See the product documentation for *PeopleTools: Search Technology*, “Creating File Source Search Definitions,” Specifying Document Types.

See the product documentation for *PeopleTools: Search Technology*, “Creating Web Source Search Definitions,” Specifying Document Types.

Defining a Content Source

As part of defining a content source, you must complete the following tasks:

1. Create a search definition for each file source or web source to be crawled.

   The search definition determines among other things:

   - The starting URL (or multiple URLs).
   - The maximum file size (which could exclude some files from the results).
   - The valid file types (which could exclude other files from the results if not set appropriately).

   See “Creating Custom Search Definitions and Categories” (Portal and Site Administration).

2. Create a corresponding search category for each search definition.

   See “Creating Custom Search Definitions and Categories” (Portal and Site Administration).

3. Deploy the newly created search definition. The corresponding search category is automatically deployed when you deploy the search definition.

   See “Deploying Search Definitions and Categories” (Portal and Site Administration).

4. Build the search index.

   See “Building Search Indexes” (Portal and Site Administration).

5. Create a folder and assign it to a crawl source.

   See Categorized Content Source Page.

6. Run the Application Engine (EPPCM_CATG) process to read the index and build categorized content.

See Categorize Crawled Content Page.

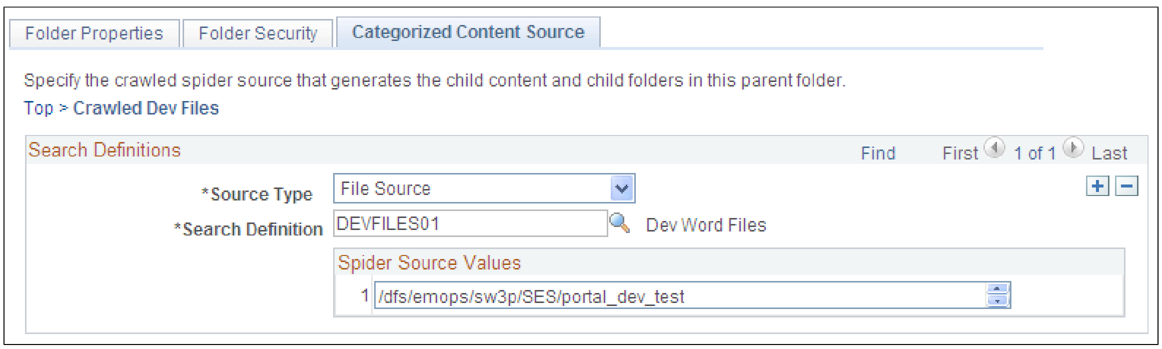
Categorized Content Source Page

Use the Categorized Content Source page (EPPCM_CATG_SOURCE) to associate an already defined content data source with the selected folder in the content management system.

Navigation:

1. **Content Management** > **Categorized Content** > **Browse Folders**
2. Click a folder title link on the Browse Categorized Content page to navigate through the folder levels.
3. Click a folder **Properties** link or click the **Add Folder** button at the appropriate folder level on the Browse Categorized Content page.
4. Select the Categorized Content Source tab.

This example illustrates the fields and controls on the Categorized Content Source page. You can find definitions for the fields and controls later on this page.



This page is used to specify the crawled source that generates the child content and child folders in this parent folder.

Note: You must set up your content sources using custom search definitions and categories before you enter information on this page.

Field or Control	***Description***
Source Type	Specify the same source type that was specified when creating the custom search definition. Available options are: • *File Source* • *Web Source*
Search Definition	Select a search definition from a list of available names. The search definition is restricted to those that you created for crawling content with the selected source type.

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Field or Control	***Description***
Spider Source Values	When you select a value for the search definition using the lookup prompt, the system automatically inserts the correctly formatted string into the **Spider Source Values** field based on the value defined for the **Starting URL** field on the Search Definition page.

Categorize Crawled Content Page

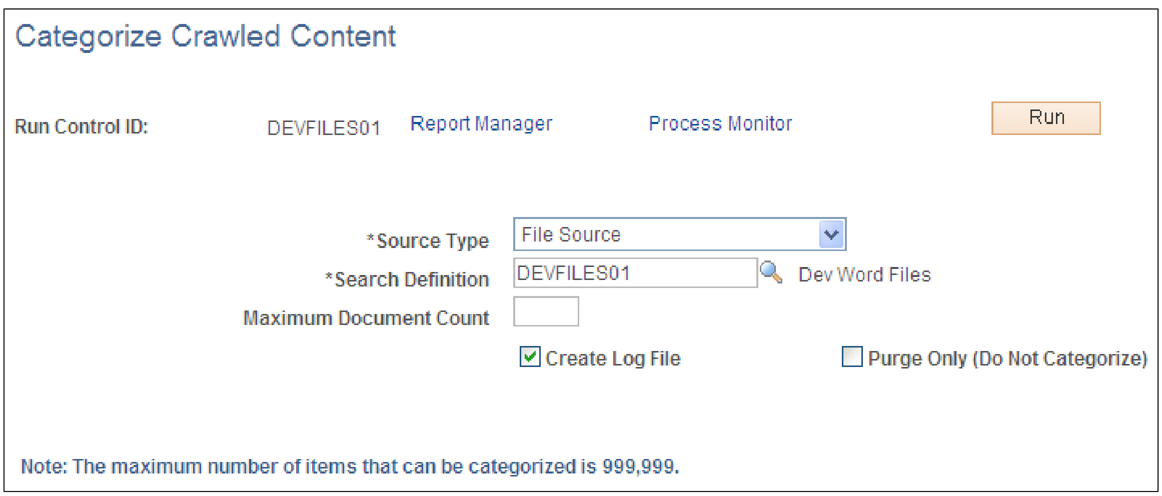
Use the Categorize Crawled Content page (EPPCM_CATG_RUN) to read index and build categorized content.

Navigation:

Content Management > **Categorized Content** > **Categorize Crawled Content**

The Categorize Crawled Content page is used to run the content categorization Application Engine (EPPCM_CATG) process.

This example illustrates the fields and controls on the Categorize Crawled Content page. You can find definitions for the fields and controls later on this page.



The content categorization Application Engine process reads the search index through PeopleSoft Search Framework (PTSF) APIs and extracts details about the content such as title, description which is used to create the content. The content created is of type U with a URL value pointing to either a web page or the location on the server for a file.

When the Application Engine process is re-run, new content is added to the content management system. Existing content is ignored. Due to the latter scenario, revised content will not be updated and would have to be manually removed from the Published status or deleted from the PeopleSoft Interaction Hub system prior to re-running the Application Engine process. Also, in cases where a file is renamed, the content title in the content management system will not be synchronised and it would be better to delete from the folder and re-run.

Note: The Application Engine process does not have the ability to process children folders, so only documents from the specified root folder are crawled.

Note: The search engine crawl is for non-secured content. Folder level security does not apply to the crawled content because the content is external to the PeopleSoft Interaction Hub database. If you require security at the folder level, you need to use Managed Content instead, and attach each file in managed content using the standard Managed Content type of file attachment.

Field or Control	***Description***
Source Type	Specify the same source type that was specified when creating the search definition for crawling. Available options are: • *File Source* • *Web Source*
Search Definition	Select a search definition from a list of available names. The search definition is restricted to those that you created for crawling content with the selected source type.
Maximum Document Count	Enter the maximum number of documents and directories that the job should categorize before terminating. **Note:** The content categorization process can categorize a maximum of 999,999 items.
Create Log File	Select to create a log file. The log file appears in the files subdirectory of process scheduler: PS_CFG_HOME/appserv/prcs/*DOMAIN_NAME*/files. This file provides details about the processed URLs and their associated folder path directories.
Purge Only (Do Not Categorize)	Select to delete the contents of the folder.

To read index and create links to the crawled content:

1. Select **Content Management** > **Categorized Content** > **Categorize Crawled Content**.
2. Enter details in the fields.
3. Click Run.

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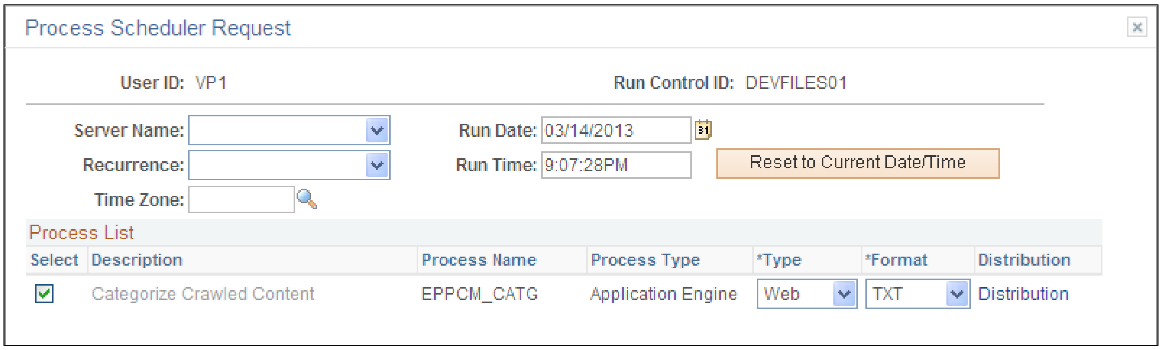
This example illustrates the Process Scheduler Request page.



After you have run the process using the Process Scheduler Request page, use the Process Monitor page to monitor the status of your process request and verify that the process has completed successfully.

On successful completion of the process, the folder associated with the content source will be populated with content in Published status.

Debugging a Run of the Content Categorization Process

All linked content is automatically published and immediately appears to the appropriate users. If you discover a document that is not appropriate for viewing, access the Unpublish Content page to remove its published status or access the folder where the document resides and click the **Unpublish** button.

If the Application Engine process runs successfully but no content is mapped into your hierarchy, there could be a number of causes and resolutions. Most likely, you may not have mapped a folder to a valid directory or folder path returned by the Application Engine process. Content source paths for file source crawls should be relative to the server in the format (file://localhost/...).

On the Categorized Content Source page for a folder, you should ensure that the source details are set to a text string or path that is the same as found by the Application Engine process.

Making Categorized Content Available on Other Sites

You can use the Application Engine process to make retrieved content available on other sites. To accomplish this, after you have run the Application Engine process on the main site, create a folder on the other site that uses the same content source as the main site. Then, run the Application Engine process while on the other site using the same run control ID as the main site. The system determines if the content already exists and marks it as located in both sites.

To make content on one site available from another site:

1. Run the Application Engine process on the main site.

   Make a note of the Application Engine process run control ID for use later.

2. On the other site, create a folder in categorized content that specifies the same content source as the main site.

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3. Run the Application Engine process on the other site specifying the same run control ID that you used on the main site.

   After you successfully run the Application Engine process, the subfolders and files viewed on the main site are available on this site. Notice that the content IDs for the files are the same as they are on the main site, indicating that the content is shared, not copied to the second site.

Reviewing Delivered Sample Categorized Content Data

This section discusses how to:

- Browse categorized content.
- Use the Portal Implementation folder.

Browse Categorized Content Page

Use the Browse Categorized Content page (EPPCM_HIERTOP_MAIN) to create hierarchies for classification and navigation.

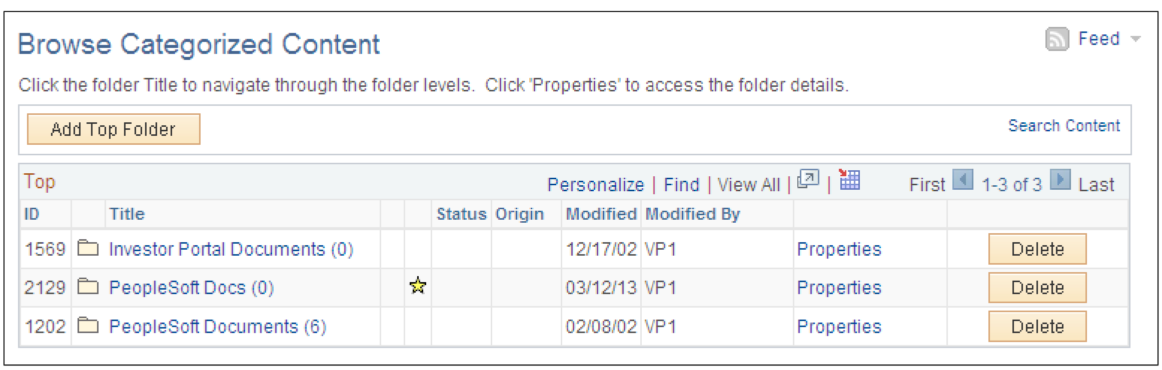
Navigation:

Content Management > **Categorized Content** > **Browse Folders**

Click the **Add Top Folder** button on the Browse Categorized Content page.

Click the **Properties** link for the folder you want to access on the Browse Categorized Content page.

This example illustrates the Browse Categorized Content page.



This page displays the top-level list of folders to which you have security to view. Clicking further down the hierarchy allows you to navigate or discover subfolders and related documents. Clicking the link for a document displays the document contents.

The sample data delivered with the PeopleSoft Interaction Hub includes one folder called *PeopleSoft Documents.* This folder shows some representative documents from *http://www.peoplesoft.com,* such as product information, white papers, and case studies. It is designed to show a combination of manually added folders, documents, and crawled content.

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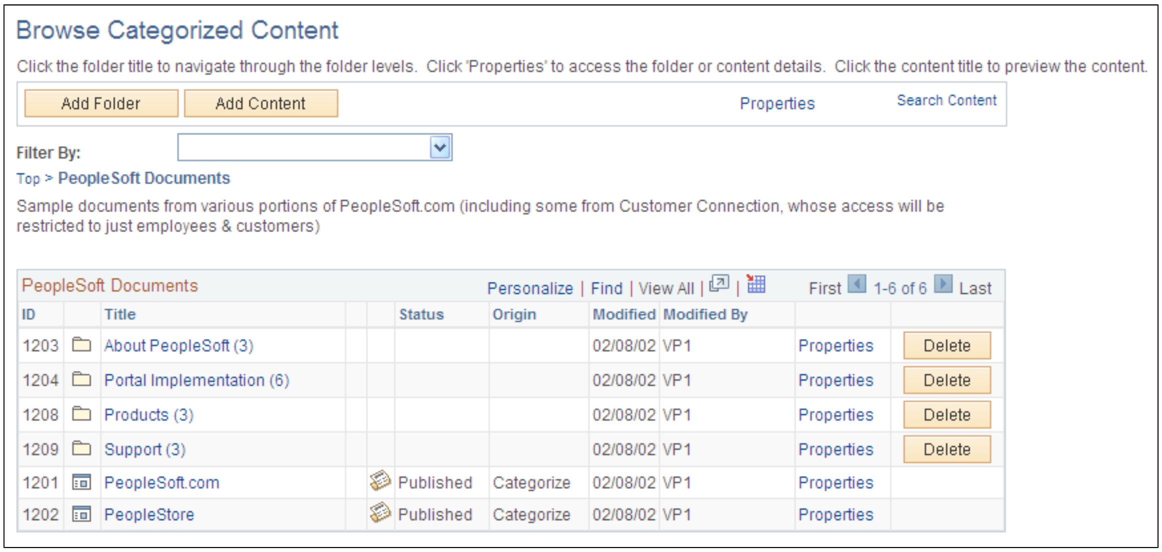
This is an example of the sample data delivered with the PeopleSoft Interaction Hub - PeopleSoft Documents folder:

This example illustrates sample data in the PeopleSoft Documents folder.



The first-level folders are divided into two groups of user access:

- The two general information folders, *About PeopleSoft* and *Products,* are visible to all users (PAPP_USER, PAPP_CUSTOMER, PAPP_EMPLOYEE, and PAPP_SUPPLIER).
- The other two folders, *Portal Implementation* and *Support,* contain documents relevant to customers and, therefore, have restricted access (PAPP_CUSTOMER and PAPP_EMPLOYEE only).

Some documents were added manually while others were added by the categorization process. The latter collection is from a directory structure that simulates data from the PeopleSoft corporate web site.

After the PeopleSoft Interaction Hub is installed, you will find these files on your web server under one of the following directories:

- For WebLogic:

  Oracle WebLogic Server - NT: *PIA_HOME*\webserv*peoplesoft*\applications\peoplesoft \PORTAL.war\ps\images\portal_pa\

  Oracle WebLogic Server - UNIX: *PIA_HOME*/webserv/*peoplesoft*/applications/peoplesoft / PORTAL.war/ps/images/portal_pa/

- For WebSphere:

  IBMWebSphere Server - NT: *PIA_HOME*\webserv*peoplesoft*\installedApps\<peoplesoft>NodeCell \<peoplesoft>.ear\PORTAL.war\ps\images\portal_pa\

  IBM WebSphere Server - UNIX: *PIA_HOME*/webserv/*peoplesoft*/installedApps / <peoplesoft>NodeCell/<peoplesoft>.ear/PORTAL.war/ps/images/portal_pa/

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Portal Implementation Folder

The *Portal Implementation* folder contains both manual and automated entries. Folders and content can be manually added below it.

The three sublevel folders at this level were all defined manually. This way, they can contain both manual and automated entries (see the Technology folder). The two documents, Portal Solutions and Portal Solutions Overview, were manually added in the content management system.

An administrator can revoke the published status of a document if it is inappropriate for any reason.

Searching Crawled Content

PeopleSoft Interaction Hub enables you to search on crawled content from the Global Search bar and from the feature-search pages. For this purpose, PeopleSoft Interaction Hub delivers the PAPP_CONTENT_CRAWLED search category that acts as a container for search definitions that you have defined for crawling

Alternatively, you can make each individual search category as a search group and assign it to a search context.

See “Maintaining Search Contexts” (Portal and Site Administration).

Note: The search on crawled content is performed against the search index and not the categorized content folders, so you can search on crawled content even if the Categorize Crawled Content Application Engine process has not been run.

To enable search on crawled content, complete the following tasks:

1. Add the search definition that is created for crawling to the delivered PAPP_CONTENT_CRAWLED search category.

   Note: The PAPP_CONTENT_CRAWLED search category must be in an undeployed state in order to add search definitions to it or remove search definitions from it. .

   Note: Remove PAPP_SAMPLE_WEBSOURCE, which is delivered as an example category, from PAPP_CONTENT_CRAWLED, if present.

   See “Delivered Search Definitions and Categories” (Portal and Site Administration).

   See the product documentation for *PeopleTools: Search Technology*, “Creating Search Categories.”

2. (Optional). Deploy the search definition that is added to the PAPP_CONTENT_CRAWLED search category. The associated search category will be deployed automatically.

   If the search definition was earlier deployed for crawling, this step is optional.

   “Deploying Search Definitions and Categories” (Portal and Site Administration).

3. Deploy the PAPP_CONTENT_CRAWLED search category.

   See “Deploying Search Definitions and Categories” (Portal and Site Administration).

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4. (Optional). Build the search index for the search definition deployed in Step 2.

   This step is optional if the search indexes have already been built while completing the steps for content crawling.

   See “Building Search Indexes” (Portal and Site Administration).

5. Add users to the search groups.

   “Adding Users to Search Groups” (Portal and Site Administration).

Related Links

“Understanding Search Index Administration” (Portal and Site Administration)

Pages Used to Search Crawled Content

Page Name	***Definition Name***	***Usage***
Global Search Page	PTSF_GLOBAL_SEARCH	Used to search on crawled content.
Search Content Management Page	EPPSR_SEARCH	Used to search on crawled content.

Search Content Management Page

Use the Search Content Management page (EPPSR_SEARCH) to search on crawled content.

Navigation:

Click the Search Content link on the Browse Managed Content page.

Click the Search Content link on the Browse Categorized Content page.

Click the Search Content link on the Browse News Publications page.

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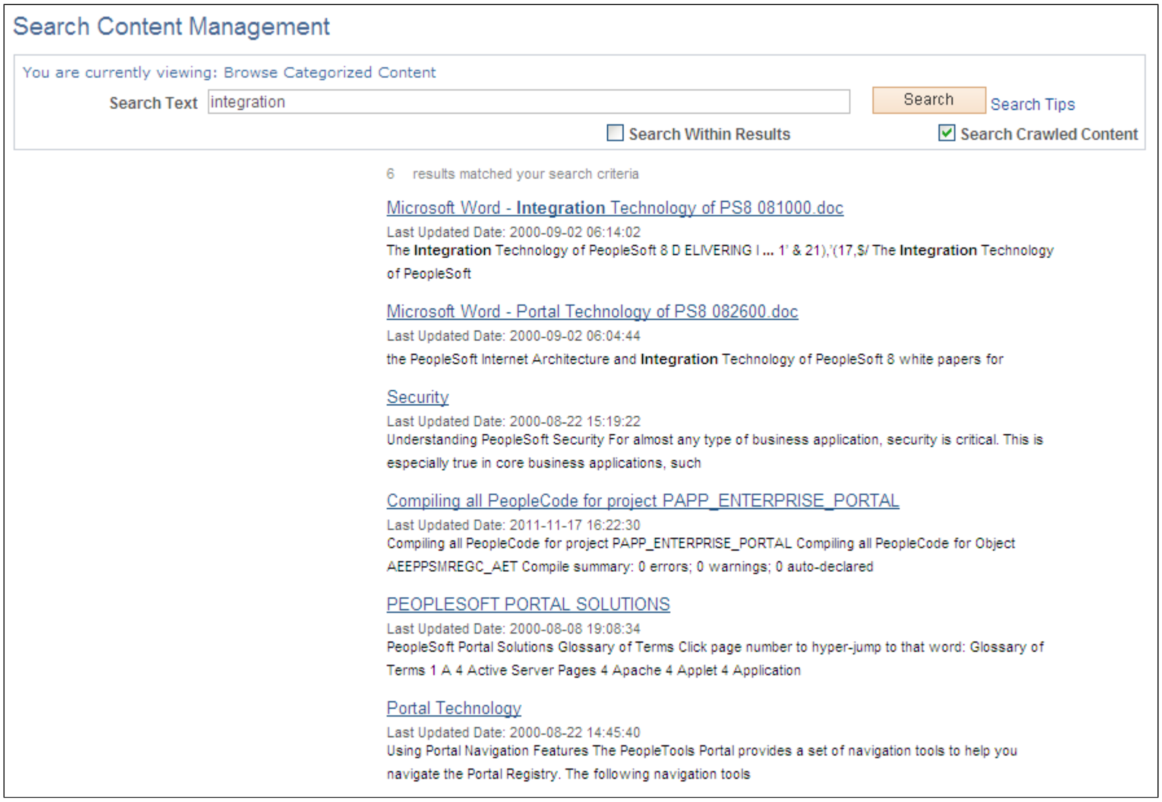
This example illustrates the fields and controls on the Search Content Management page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Search Text	Enter the search criteria. **Note:** Do not use blank or * (asterisk); these are not valid search criteria.
Search Tips	Click to display search syntax and examples on the Search Tips page.
Search Crawled Content	Select to search on crawled content.
Search Within Results	Select to search within the search results.
Search	Click to perform the search.

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Chapter 7

Setting Up and Working With News Publications

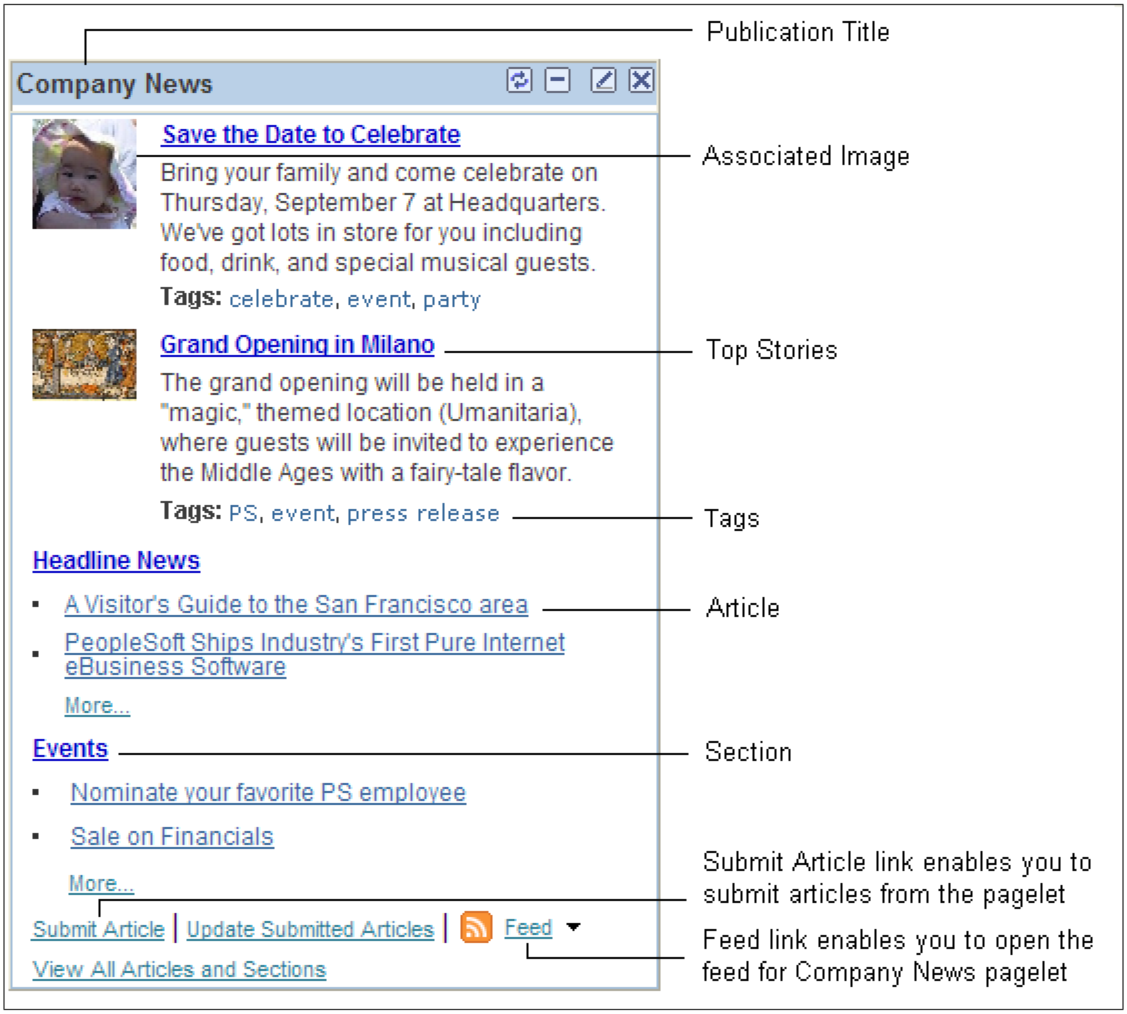
Understanding News Publications

In Oracle's PeopleSoft Interaction hub, a news publication enables organizations to organize content by sections and articles and then present that content to a defined audience through a homepage pagelet.

You can have multiple news publications as different pagelets to meet various communication needs of your organization, such as company-wide news, local interest, product line, or department. Each separate publication can be managed by a separate group of publishers, and content can be tailored by these publishers for a focused target audience. In these publications, you further organize articles into sections, create top stories, and offer users the opportunity to submit new content to the publisher for consideration. Articles can come from a variety of sources—everything from ad hoc HTML or file submissions to selections from the Managed Content feature. Publishers can reuse the same article in various news publications to reach their entire target audience.

A news publication pagelet presents information to users in an easy-to-use, focused format, and enables publishers to incorporate images and designate top stories to emphasize content.

This example illustrates the following aspects of a news publication pagelet: publication title, associated images, top stories, articles, sections, **Submit Articles** link, and Feed link.



A news publication enables organizations to organize content by sections and articles and then present that content to a defined audience through a homepage pagelet.

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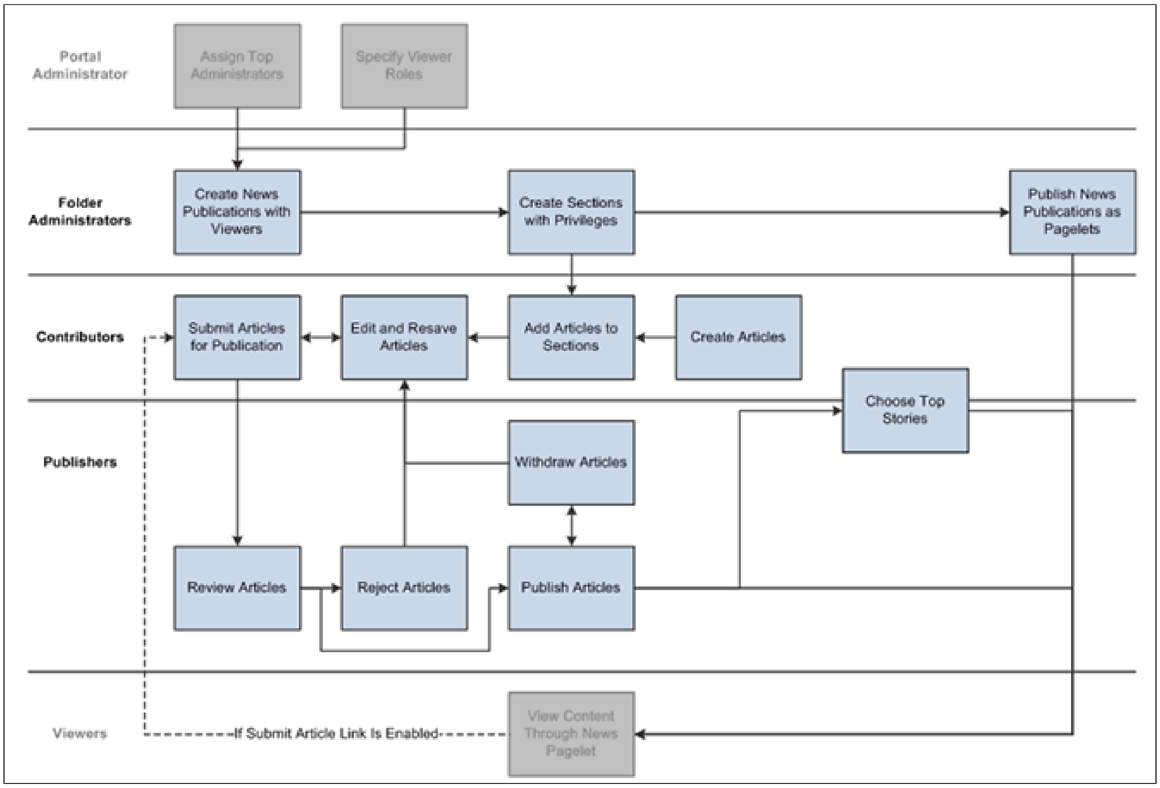
This example illustrates the steps to develop a news publication.



These are the steps to develop a news publication as shown in the previous process flow diagrams:

1. Create a news publication and assign the audience as a viewer role (top administrator).
2. Create sections in the news publication and assign privileges to each section (folder administrator).
3. Create and add news articles to the sections (contributors).
4. Submit articles for publication (contributors).
5. Review articles and determine the appropriate action: reject or publish (publishers).
6. Publish articles; withdraw published articles as appropriate (publishers).
7. Choose top stories (publishers and contributors).
8. Publish news publications as pagelets (top administrators).
9. If the **Submit** button is enabled for the news publication, submit articles through the pagelet (viewers).

Related Links

My News Content Pagelet

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Setting Up News Publications

This topic discusses ways to create news publications and to add folder security.

Pages Used to Set Up News Publications

Page Name	***Definition Name***	***Usage***
Folder Properties Page	EPPCM_CATG_MAIN	Set the properties for a new folder or update property details for an existing folder. Use this page for news publications as well as for sections.
Folder Security Page	EPPCM_CATG_MEM	Manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.
Folder Security - Set Members Privileges Page	EPPCM_CATG_PRIV	Define users and roles and specify their access privileges.

Folder Properties Page

Use the Folder Properties page (EPPCM_CATG_MAIN) to set the properties for a new folder or update property details for an existing folder.

Navigation:

Content Management > **News Publications** > **Browse Publications**

Click the **Add Publication** button or the **Properties** link on the Browse News Publications page.

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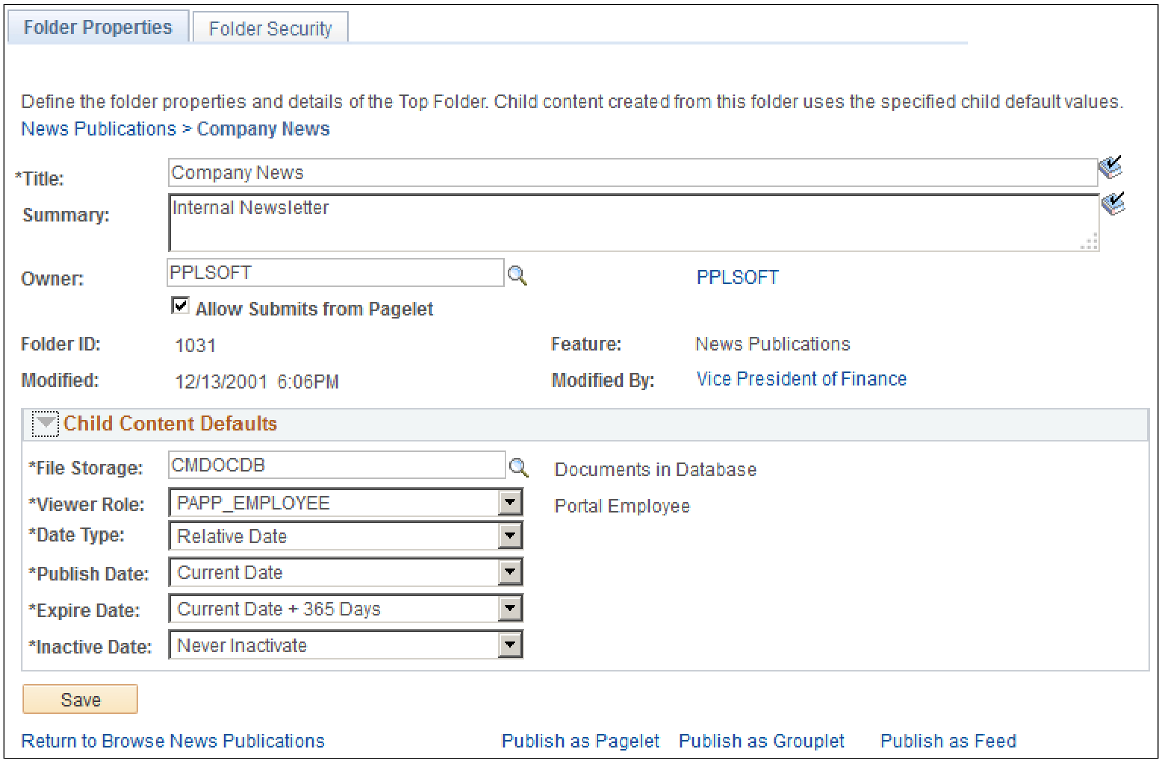
This example illustrates the fields and controls on the Folder Properties page: News Publications feature. You can find definitions for the fields and controls later on this page.



Users can add folders at any level for which they have authorization. Only top administrators can create news publications at the root of the news publications feature. At the section level, any folder members with the proper privilege can add sections.

Field or Control	***Description***
Title	Enter the name of the pagelet as it will appear in the pagelet header.
Summary	Add a brief description of the content. This field supports HTML entries.
Allow Submits from Pagelet	Select to enable users to submit news articles from the homepage pagelet.
Publish as Pagelet	Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet. **Note:** This link is available only when the user has publish folder permission. See Publishing a Folder or Content Item as a Pagelet.

Field or Control	*Description*
Publish as Grouplet	Click to access the Publish as Grouplet Definition page, to publish a news publication, a section or an article as a grouplet that can be added as a new tile on the Fluid homepage.
Publish as Feed	Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed. **Note:** This link is available only when the user has publish folder permission. Only top publication can be published as feed. See Top Folder Properties - Advanced Feed Options Page.

Child Content Defaults

Child content created from this folder uses the specified child default values.

Field or Control	*Description*
File Storage	Select the storage locations for any content that are attached files. Available locations are based on those defined on the Define File Storage page. See File Storage Page.
Viewer Role	Select a default viewer for newly added content. The choice of viewer roles is based on the list constructed on the Define Viewer Roles page. The default viewer role on the publication top folder is used as the default viewer role when publication sections are created. The default viewer role of this section is used to provide the viewer role for the content created within the section. The viewer roles of the content are actually used in determining the security for displaying the content within the News Publication pagelet. See Viewer Roles Page.
Date Type	Select either *Relative Date* or *Absolute Date* to define content default publish and expiration dates for this publication. **Note:** This value can be redefined on the section level.

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Field or Control	***Description***
Publish Date	Select the content default publish date for this publication.
Expire Date	Select the expiration date for the default values of the content in this folder.
Inactive Date	Select different periods of time as dates when the content will become inactive. This is the default value used for content created in this folder. You can also select the option to not inactivate the content. Available options are: • *Current Date* • *Current Date + 1 Week* • *Current date + 30 Days* • *Current Date + 90 Days* • *Current Date + 365 Days* • *Current Date +999 days* • *Never Archive*

See Administering the Content Management System.

Folder Security Page

Use the Folder Security page (EPPCM_CATG_MEM) to manage the folder members and their privileges.

This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.

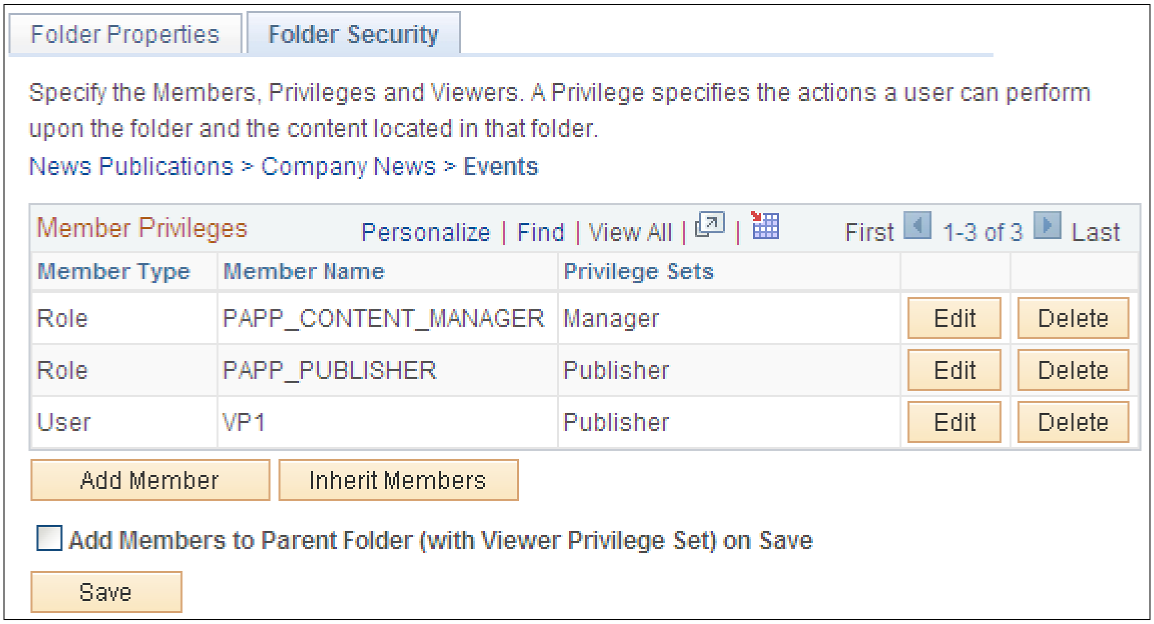
Navigation:

Content Management > **News Publications** > **Browse Publications**

Click the **Add Publication** button or the **Properties** link on the Browse News Publications page.

Select the Folder Security tab on the Folder Properties page.

This example illustrates the fields and controls on the Folder Security page: News Publications feature. You can find definitions for the fields and controls later on this page.



A new section automatically inherits the members and privileges of its parent news publication. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

Note: A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member of a folder.

Field or Control	***Description***
Member Privileges	Displays type, name, and privilege sets for the members of the folder. Privileges specify the actions that a member can perform on the folder and the content contained in the folder. **Note:** A viewer member privilege defined in the Member Privileges section of the page is not equivalent to a viewer role defined in the Viewer Roles section of the page, even if the same role ID is used. In the case of the former, a viewer member privilege allows that member to view the folder and all of its contents (in draft, pending, or published states) through the folder hierarchy. The latter allows users with that role to view only published content and only through the Browse by Category page.
Edit	Click to edit privileges of this member.

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Field or Control	*Description*
Delete	Click to remove the member and prohibit him or her from accessing content from this folder.
Add Member	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform on the folder and the content located in that folder.
Inherit Members	Click to inherit members from the parent folder.
Add Members to Parent Folder (with Viewer Privilege Set) on Save	Select to add viewer members to the parent folders.

Folder Security - Set Members Privileges Page

Use the Folder Security - Set Members Privileges page (EPPCM_CATG_PRIV) to define users and roles and specify their access privileges.

Navigation:

Content Management > **News Publications** > **Browse Publications**

Click the **Add Publication** button or the **Properties** link on the Browse News Publications page.

Select the Folder Security tab, and click the **Add Member** button on the Folder Security page.

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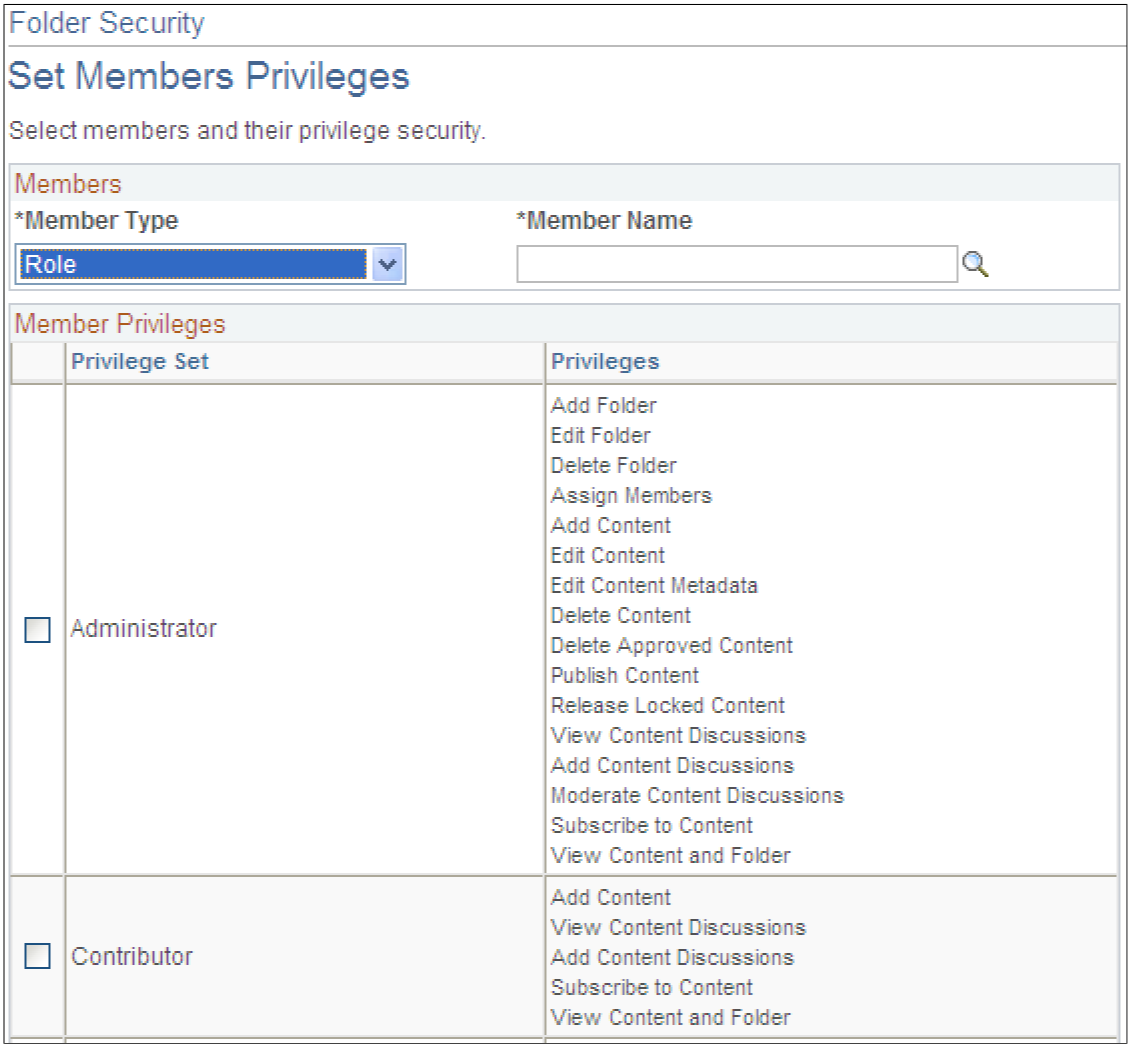
This example illustrates the fields and controls on the Folder Security - Set Members Privileges page: News Publications feature. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Member Type	Select a membership type of *User* or *Role.*
Member Name	Select a member name.
Privilege Set	Assign privileges to this member by selecting privilege sets. **Note:** The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Categorized Content feature.

See Privilege Sets Page.

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Managing Sections and Section Articles

This topic discusses ways to add sections to publications and manage section articles.

Pages Used to Manage Sections and Section Articles

Page Name	*Definition Name*	*Usage*
Folder Properties Page	EPPCM_CATG_MAIN	Define the properties for a new folder or update property details for an existing folder. Use the Folder Properties page for news publications as well as for sections within a publication. At the publication level, any folder members with the proper privilege can add sections.
Folder Security Page	EPPCM_CATG_MEM	Add new members or inherit members from the parent folder.
Folder Security - Set Members Privileges Page	EPPCM_CATG_PRIV	Assign members and determine the actions they can perform on the folder and the content located in that folder.
Browse Section Articles Page	EPPCM_HIERNWS_MAIN	View basic information about the articles within a single section of a news publication and access article details. You can add, edit, delete, or view articles depending on article status and member privileges for the section.

Folder Properties Page

Use the Folder Properties page (EPPCM_CATG_MAIN) to define the properties for a new folder or update property details for an existing folder.

Use the Folder Properties page for news publications as well as for sections within a publication. At the publication level, any folder members with the proper privilege can add sections.

Navigation:

Content Management > **News Publications** > **Browse Publications**

Click a folder title on the Browse News Publications page to navigate through the folder levels.

Click the **Add Folder** button or the **Properties** link at the appropriate level on the Browse Publication Sections page.

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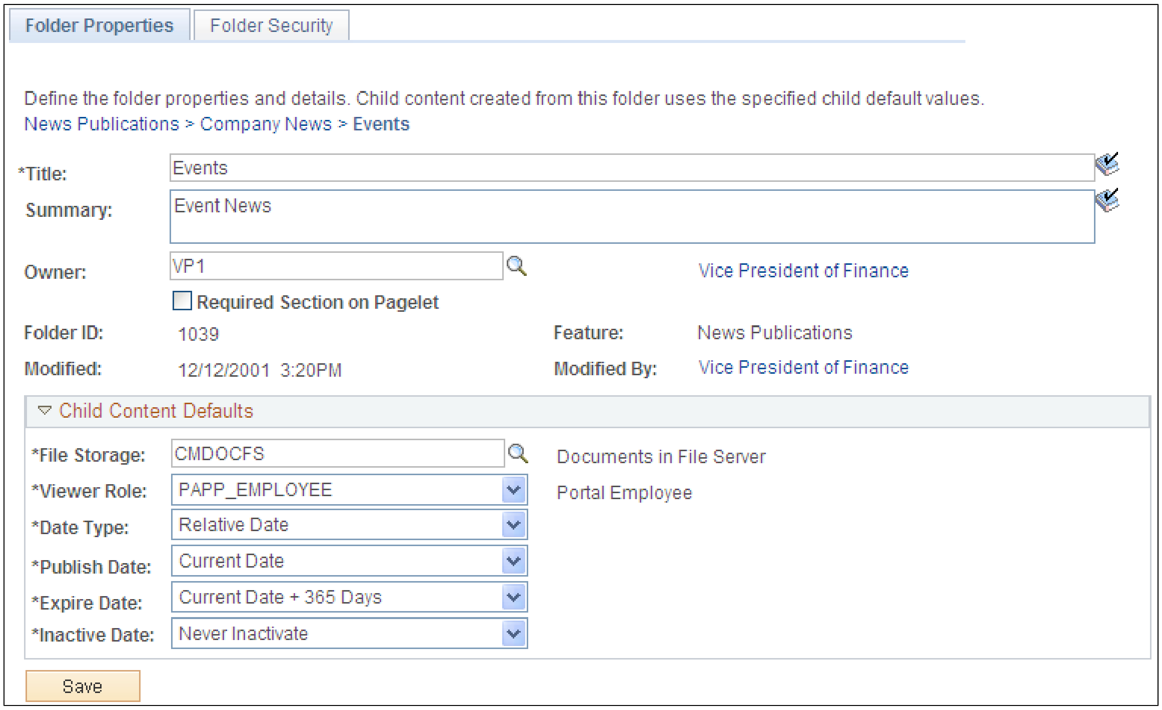
This example illustrates the fields and controls on the Folder Properties page with the Required Section on Pagelet option selected. You can find definitions for the fields and controls later on this page.



See Folder Properties Page.

Field or Control	***Description***
Required Section on Pagelet	Select this option if you want this section to appear on the pagelet. This selection forces the section onto the pagelet for all viewers and can be used to communicate important information when used in conjunction with a pagelet that is registered as required on a homepage tab. **Note:** This selection does not enable all viewers to view all articles; viewer roles on the articles still control whether a viewer can view any particular article on a pagelet.

After you select the **Required Section on Pagelet** option, a new section automatically inherits the members and privileges of its parent news publication in the Folder Security page. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

See Folder Properties Page.

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Browse Section Articles Page

Use the Browse Section Articles page (EPPCM_HIERNWS_MAIN) to displays basic information about the articles within a single section of a news publication and provides access to article details.

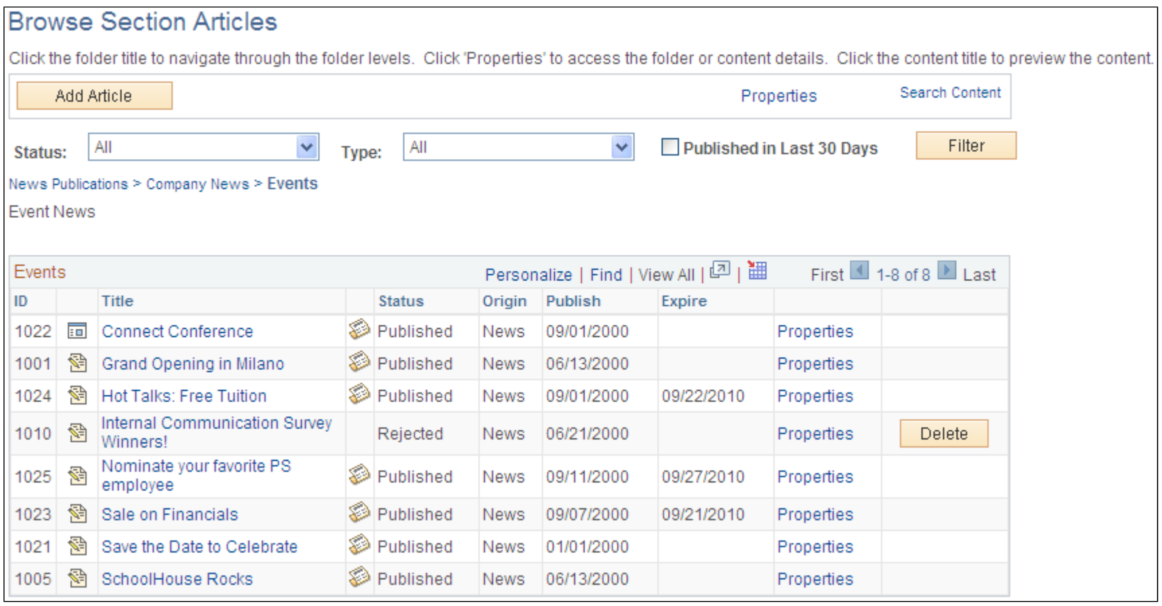
You can add, edit, delete, or view articles depending upon article status and member privileges for the section.

Navigation:

Content Management > **News Publications** > **Browse Publications**

Click a section that has no children on the Browse Publication Sections page.

This example illustrates the fields and controls on the Browse Section Articles page. You can find definitions for the fields and controls later on this page.



Use the Browse Section Articles page to display basic information about the articles within a single section of a news publication. This page provides access to article details. You can add, edit, delete, or view articles depending upon article status and member privileges for the section.

Field or Control	***Description***
Feed	Hover over any of these to view the list of feeds published for this discussion forum. Click any list item to open that feed document. Click the Feed button or Feed link to open the first feed document in the list. Click the Open menu button to toggle the list of feeds between frozen open and closed. See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).
Add Article	Select to add a new article to this section.

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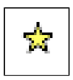
Field or Control	***Description***
Filter	Click to limit the number of articles displayed on the page based on the values entered for the **Status, Type,** and **Published in Last 30 Days** fields.
Status	Select to search articles with a status of *Draft, Pending, Published, Rejected, Rework,* or *All.*
Type	Select to search articles with a type of *File, Text/HTML, Web Site,* or *All.*
Published in Last 30 Days	Select to limit your search to articles published within the last 30 days.

Section Articles

Field or Control	***Description***
	The star icon indicates articles that were added within the last five days.
	The Published icon indicates published articles.
Status	Displays the current publishing status of the article: *Draft, Pending, Publish, Reject,* or *Rework.* **Note:** You can use the **Status** drop-down list box to search based on a selected status.
Origin	Displays where the article originated. Values are: • *News:* Indicates that the article was created from the News Publications feature. • *Managed:* Indicates that the article was imported from the Managed Content feature.
Publish	Display the dates that articles are scheduled to be published based on the folder properties for this section.
Expire	Display the dates that articles are scheduled to expire based on the folder properties for this section.

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Field or Control	***Description***
Delete	Click to delete the selected article. **Note:** You cannot delete published articles from this page. You must first unpublish the article, or use the Administer Content functions. See Administering News Content.

Adding News Articles

This section discusses how to add articles.

Pages Used to Add News Articles

Page Name	***Definition Name***	***Usage***
Browse Section Articles - Add News Article Page	EPPCM_ADDCONT_SEC	Specify the type of content you want to add to a section of a news publication. News publications support file attachments, managed content, text or HTML content creation, and website URLs. Select *Managed Content* to import existing content into the News Publications feature.
News Publications – Content Properties Page	EPPCM_CONT_MAIN	Submit articles for publication. See Categorized Content Properties Page and also <Content Type> Properties Pagefor more information on Content Properties Page for different content types.
Text or HTML Properties	EPPCM_VER_HTML_SEC	Review the text or HTML content entered on the Content Properties page. See <Content Type> Properties Pagefor more information on Text or HTML Properties.
News Publications Properties - Article Locations	EPPCM_CONT_LOC	Select the locations where the article should be published. Available locations are limited by security access.

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Page Name	*Definition Name*	*Usage*
Content Notification	EPPCM_CONT_NTFY	Send email notifications of saved content to the list of interested parties.
Content Viewers	EPPCM_CONT_VWR	Select the roles that can view this content when it is published.
Content Comments	EPPCM_CONTCOMM_SEC	Enter any additional information about the article.

Browse Section Articles - Add News Article Page

Use the Browse Section Articles - Add News Article page (EPPCM_ADDCONT_SEC) to specify the type of content you want to add to a section of a news publication.

News publications support file attachments, managed content, text or HTML content creation, and website URLs.

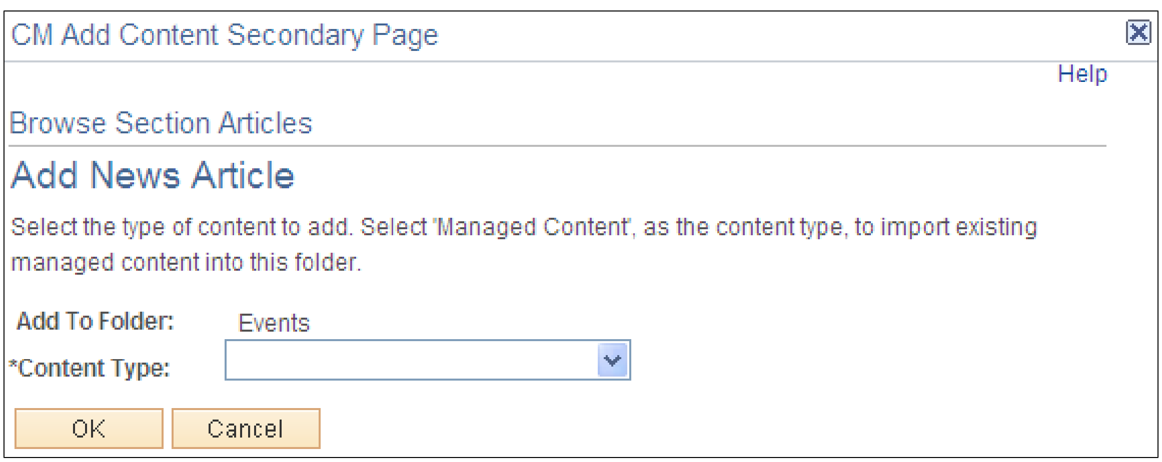
Navigation:

Content Management > **News Publications** > **Browse News Publications**

Click a title link in the Browse Publication Sections page.

Click the **Add Article** button on the Browse Section Articles page.

This example illustrates the fields and controls on the Browse Section Articles - Add News Article page.



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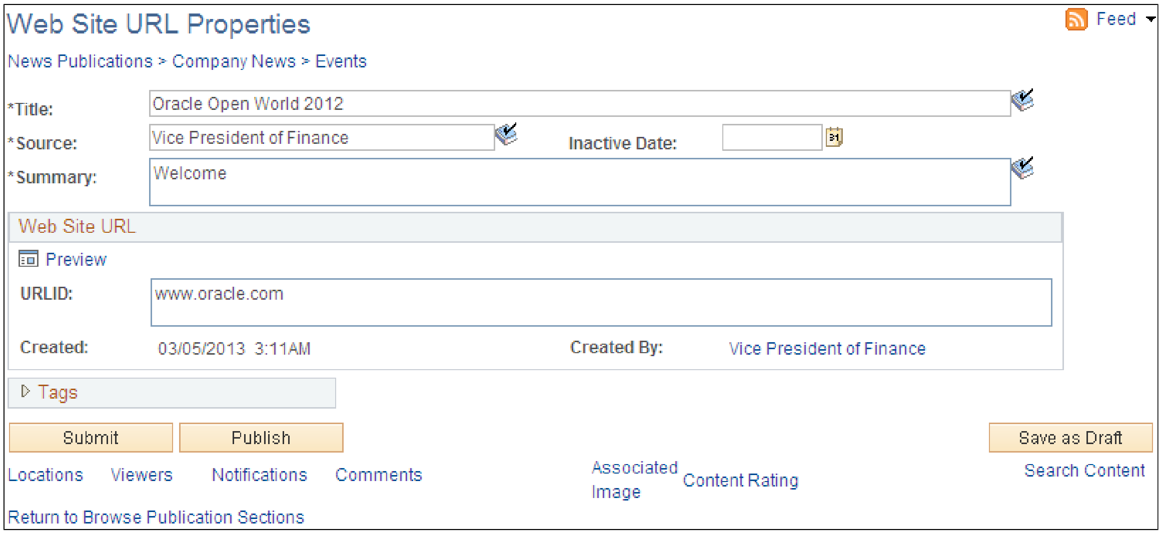
Field or Control	*Description*
Content Type	Select a content type. Available options are: • *File Attachment* Upload files into PeopleSoft Content Management. • *Managed Content* Select existing managed content. • *Text or HTML* If you select *Text or HTML,* you can enter HTML tags in the summary field to format text and enter links. For example, if you enter `<B> This information is for internal use only </B>`, the text appears in bold as **This information is for internal use only** in the preview text. If you enter a link `<a href="http://www.myemployeewebsite.com">News</a>`, a link to the web site appears in the preview. • *Web Site URL* Enter a web URL. The News Publication Properties page appears based on the content type that you selected.
OK	After you select a content type and click this button, a search page appears enabling you to select the piece of managed content to import into a news publication. **Note:** When content is added to managed content, its status is set to *checked out.*

Adding News Publication Attachments

Access the News Publications - Web Site URL Properties page (select **Content Management** > **News Publications** > **Browse Folders;** click an entry in the **Title** column; click the **Add Article** button in the Browse Section Articles page; select the type of content, and then click the **OK** button on the Add Article page).

This example illustrates the fields and controls on the News Publications - Web Site URL Properties page.



Note: The name of this page and its fields that appear depends on the content type that you selected on the Browse Section Articles - Add News Article page.

Field or Control	***Description***
Feed	Click to open the feed for this item, if available. See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).
Source	Enter the article source. This is a free text field. The entry appears on article rendering. See Browse Section Articles Page.
Upload File	Click to open a new browser window where you can select a file to upload. **Note:** Uploaded files are saved automatically. When the folder properties are set to auto-approved, the **Version Status** field indicates that new content is approved when it is added.

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Field or Control	***Description***
Publish	This option appears only if the current user has the *Publish Content* privilege for the current location and at least one location is listed to be published. Click to save and publish this content item. All fields will become read-only. Published content appears on the Browse Section Articles page to users who have the viewer roles for the parent folder where the content is located.
Unpublish	Click to save the content and save it to Pending Publishing. Nonpublished content does not appear on the Browse Section Articles page. See Unpublish News Articles Page.
Save as Draft	Click to save this content item in draft format. You can continue to edit the content property fields for this item. Content in draft status does not appear on the Browse by Category page because it is not published.
Locations	Click to set the publish and expiration dates for the content in this location and set the item to be published.
Viewers	Click to select the roles that can view this article when it is published. **Note:** The choice of viewer roles is based on the list constructed on the Define Viewer Roles page. See Viewer Roles Page.
Notifications	Click to create a list of interested parties or send email notifications of saved content to the list of interested parties.
Save	Click to save the content item without changing the publish status.
Comments	Click to add additional comments about this content item.

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Field or Control	***Description***
Associated Image	Select to associate a new or existing image with the article. **Note:** The image will appear along with the article when it's viewed. See Associating Images with News Articles.
Start Discussions	Click to begin a discussion topic. **Note:** Discussion topics stay with the content item and cannot be accessed outside of the Content Properties page.
View Discussions	This option is available only when a discussion topic already exists for this content item. Click to view, edit, or enter a response to a discussion.
Search Content	Click to search for existing content within the Categorized Content feature.

Choosing Article Locations

Access the News Publications Properties - Article Locations page (select **Content Management** > **News Publications** > **Browse Folders;** click an entry in the **Title** column; click the **Add Article** button; select the type of content and then click the **OK** button; click the **Locations** link on the News Publications Properties page).

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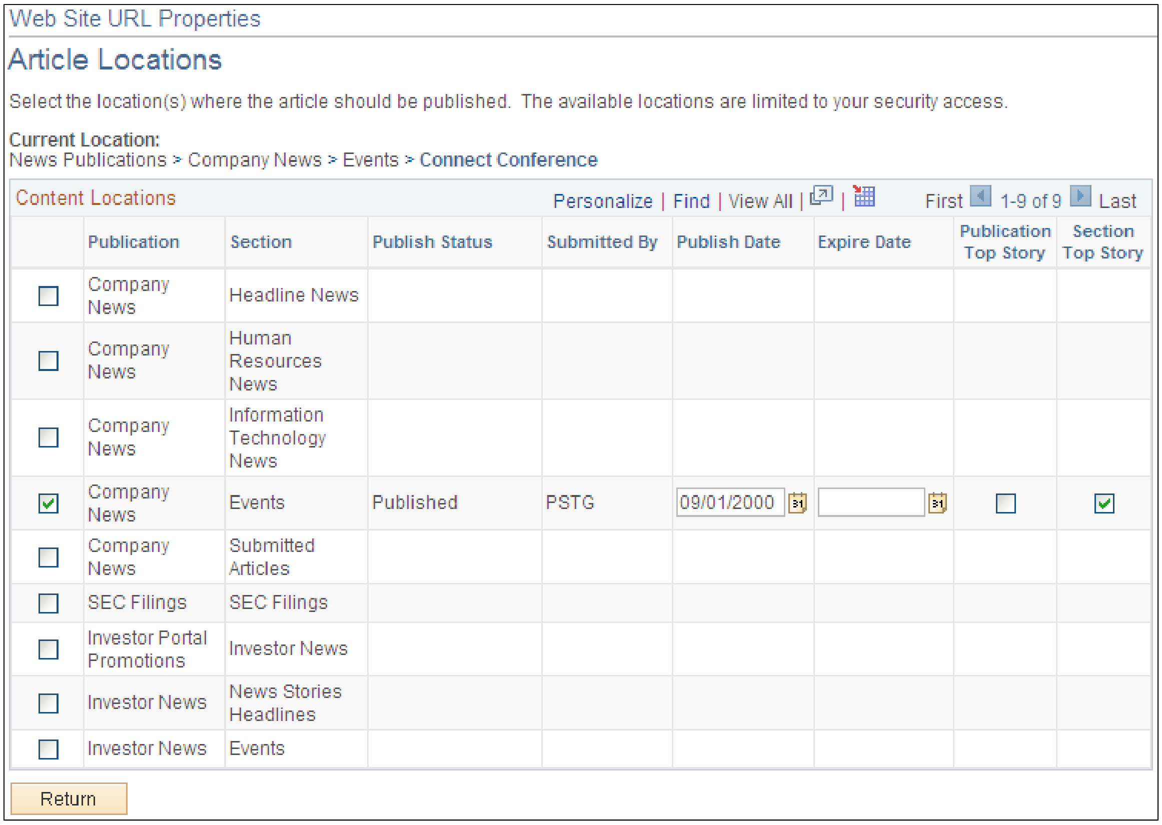
This example illustrates the fields and controls on the News Publications Properties - Article Locations page.



To select locations:

1. Select the check box next to the desired publications.
2. Update the publish and expiration dates if necessary.

   Default publication and expiration dates appear based on the settings for the selected section.
3. Select the appropriate options to display the article on the News Publications pagelet as a publication top story or as a section top story.
4. Select the **Publish** option to publish the content from the properties page.

   Note: The button and check box appear only if the current user has publish content privilege for the selected location.

Note: If desired, you can clear the **Publish** option to move the article to a different publication as unpublished. You can also click the **Submit** button on the properties page to submit the article to the new publication with a status of pending.
A blank **Publish Date** field indicates that the publish date is always current. A blank **Expire Date** field indicates that the publish date never expires.

Related Links

Adding a Piece of Managed Content

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Choose Top Stories Page

Associating Images with News Articles

This topic discusses steps to associate new or existing images with news articles and view them.

Pages Used to Associate Images with News Articles

Page Name	***Definition Name***	***Usage***
Associated Image Page	EPPCM_CONT_IMG	Review which image is associated with a news article. From this page, you can associate an existing image with the article on the Select Associated Image page. Or you can access the Add Associated Image page to add a new image to the article. The image will appear along with the article when it's viewed.
Add Associated Image Page	EPPCM_CONT_IMGADD	Add a new image to the content management system to associate it with news articles. The image is stored in the system when you click **Save New Image.**
Select Associated Image Page	EPPCM_CONT_IMGSEL	Associate an existing image in the content management system with the selected news article.

Associated Image Page

Use the Associated Image page (EPPCM_CONT_IMG) to review which image is associated with a news article.

From this page, you can associate an existing image with the article on the Select Associated Image page. Or you can access the Add Associated Image page to add a new image to the article.

Navigation:

Content Management > **News Publications** > **Browse News Publications**

Click title links to access the Browse Section Articles page, and click the **Add Article** button or a content Properties link.

Click the **Associated Image** link on the Content Properties page.

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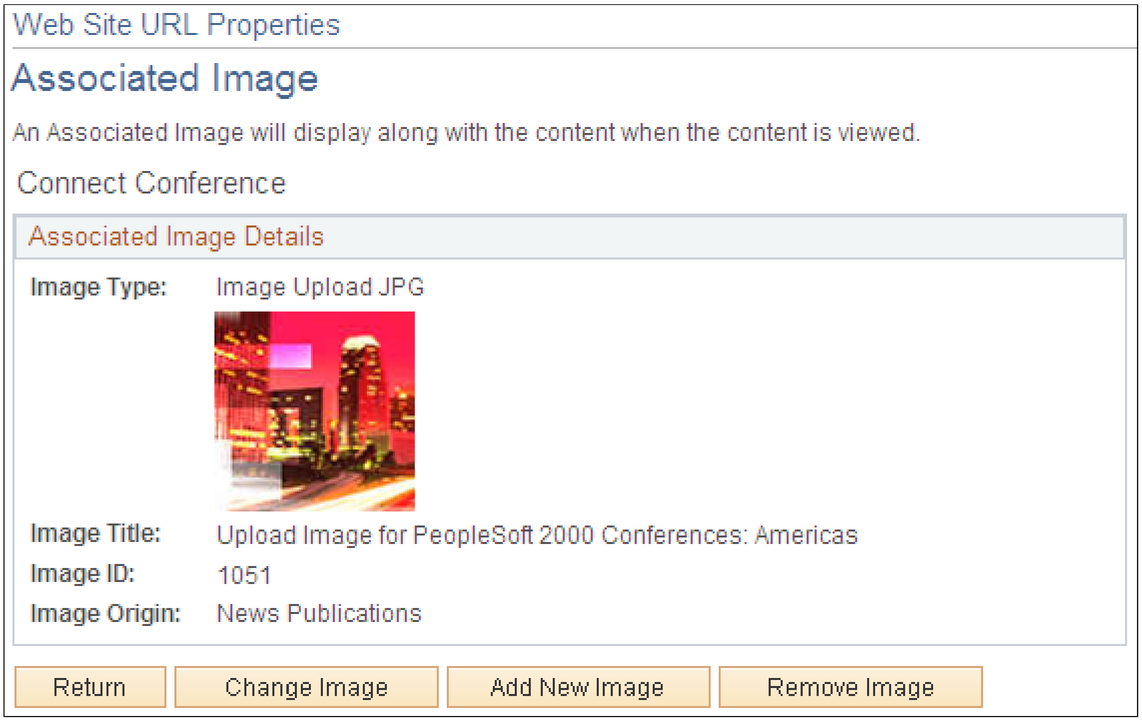
This example illustrates the fields and controls on the Associated Image page.



Field or Control	***Description***
Change Image	Click to access the Select Associated Image page, where you can associate an existing image with the article. See Select Associated Image Page.
Add New Image	Click to access the Add Associated Image page, where you can add a new image to the article.
Remove Image	Click to remove an existing image that is currently displayed with article.

Add Associated Image Page

Use the Add Associated Image page (EPPCM_CONT_IMGADD) to add a new image to the content management system to associate it with news articles.

Navigation:

Content Management > **News Publications** > **Browse News Publications**

Click title links to access the Browse Section Articles page, and click the **Add Article** button or a content Properties link.

Click the **Associated Image** link on the Content Properties page.

Click the **Add New Image** button on the Associated Image page.

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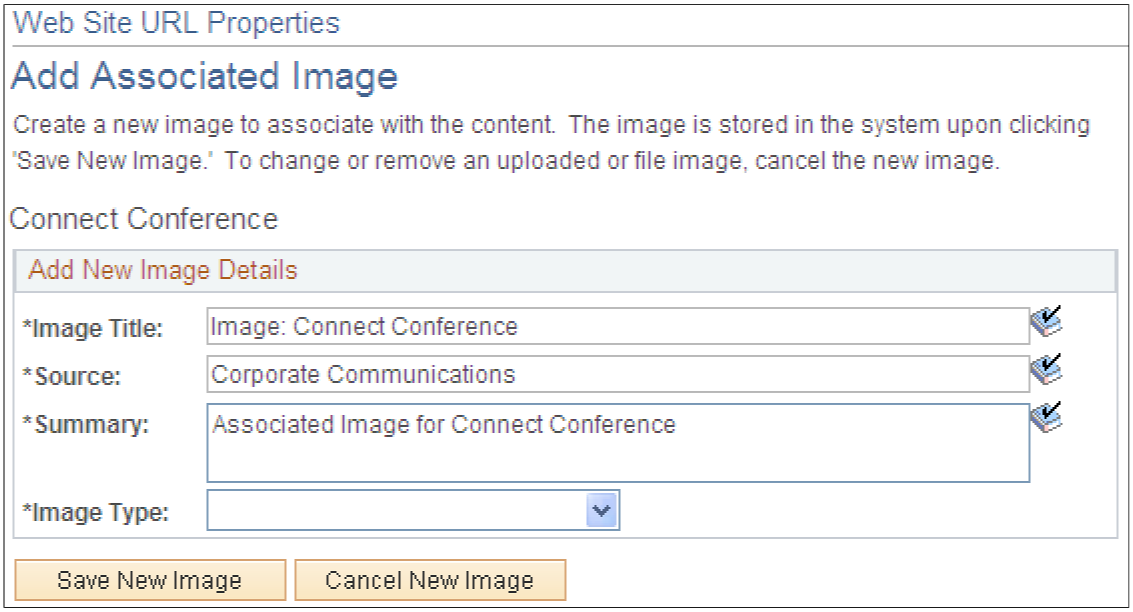
This example illustrates the fields and controls on the Add Associated Image page.



Note: News Publication image content can be deleted only from the Administer Content page. The image content does not appear in the Browse Publication pages because the image content is not considered an article, but is only associated with articles.
News Publication image content can also be accessed from the **Maintain Content** link on the search dialog. Use the advanced search to select the image content type.

Field or Control	***Description***
Image Title, Source, and **Summary**	Enter a title and the source. The **Image Title, Source,** and **Summary** fields are derived from attributes of the associated news article. These default values might not be appropriate for the new image that you add to the Content Management system.
Image Type	Use the drop-down list box to select the image type. Available options are: • *Image Attachment*: Uses ftp to transfer the image file to the web server. • *Image URL*: Uses an absolute or relative URL to locate the image file. • *Image Upload JPG*: Stores a JPG image in the database as a blob (limited to 32 KB).
Upload File	Click to upload the image attachment file.

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Field or Control	***Description***
URL	Enter the URL to locate the image file. If the image exists on the web, enter the web address. If the image exists on the web server, enter the absolute path, for example, */ps/images/portal_pa/myimage.gif*.
Save New Image	Click to save the added image as a content item stored in the top folder of the publication.

Note: Save the content when you return to the Content Properties page. If you do not save the content, the saved image is not associated with the article, but the image content is saved. You can update the image content using the Administer Content page.
Only users who have the *Delete Content* privilege on the News Publication top folder (where the image content is located) can associate an image with an article. This includes adding a new image or adding an existing image.

Select Associated Image Page

Use the Select Associated Image page (EPPCM_CONT_IMGSEL) to associate an existing image in the content management system with the selected news article.

Navigation:

Content Management > **News Publications** > **Browse News Publications**

Click title links to access the Browse Section Articles page, and click the **Add Article** button or a content Properties link.

Click the **Associated Image** link on the Content Properties page.

Click the **Add Existing Image** button on the Associated Image page.

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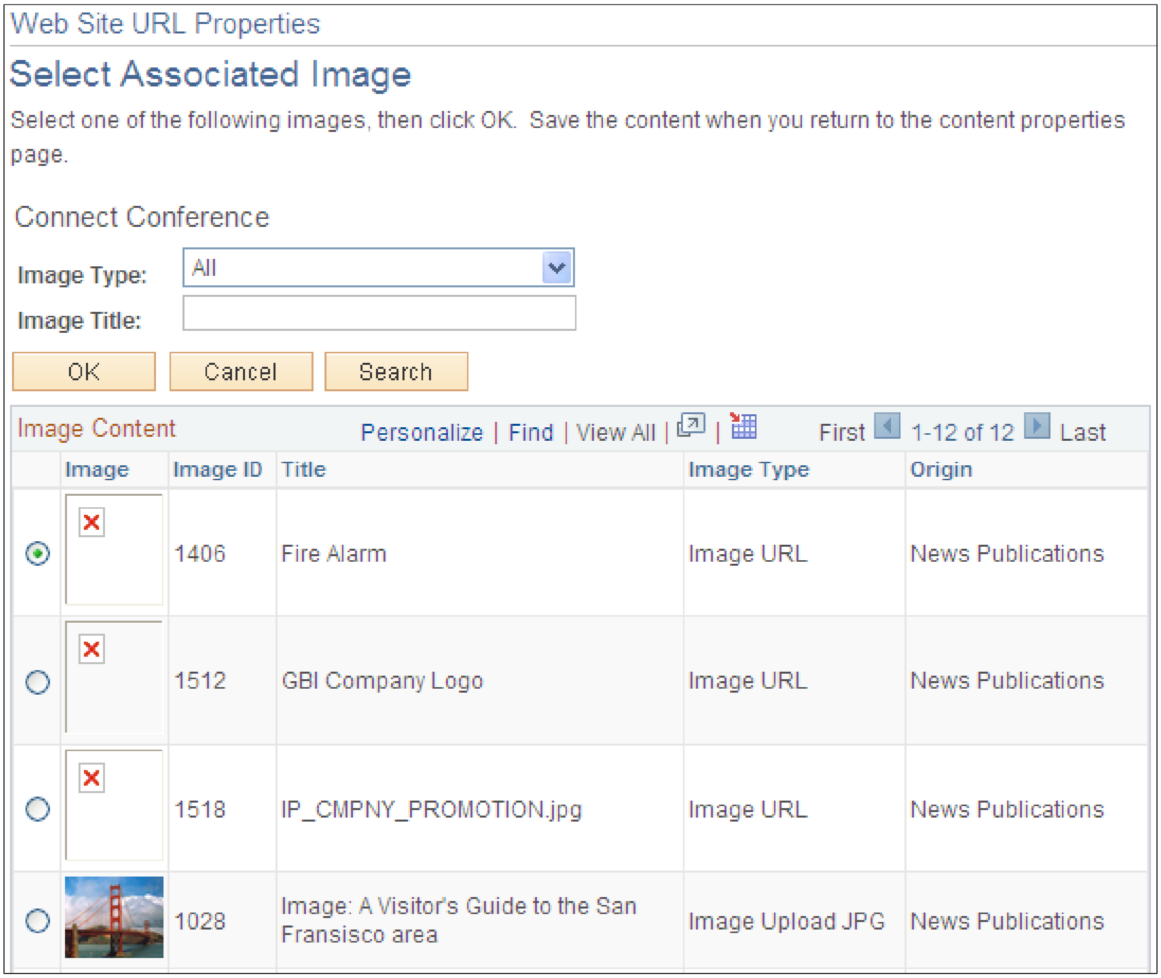
This example illustrates the fields and controls on the Select Associated Image page.



The list of available images is supplied from the News Publications and Managed Content, where the user has viewer privileges to the parent folder, and the parent folder has the *Content can be Published* option enabled.

Field or Control	***Description***
OK	Select one of the images and click this button to associate an existing Content Management image with the selected news article.

Note: Save the content when you return to the Content Properties page.

Deleting News Publications

To delete a news publication, you must do some preparatory work first, including withdrawing or moving published articles and disallowing articles to be submitted from the pagelet if this option has been set.

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Note: You must be a top administrator to be able to delete a publication in the News Publication feature.

Use the following procedure to delete a news publication:

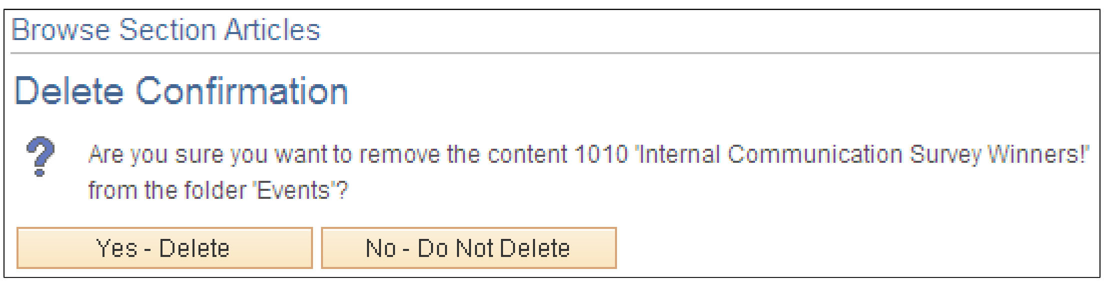
1. Review the article status in each section of the publication.
2. Withdraw published articles, or move published articles to another publication.

   Note: An image associated with a published article also has a status of published. Withdrawing a published article does not change the published status of its associated image, which must be changed separately. However, moving a published article to another publication moves its associated image as well.

3. If the publication allowed articles to be submitted from the pagelet, then deselect this option on the Folder Properties page.
4. If the publication allowed articles to be submitted from the pagelet, then move or delete any submitted articles from the Submitted Articles folder.
5. Delete the publication from the Browse News Publications page.

This is an example of the Browse Section Articles - Delete Confirmation page, which is used to confirm the deletion:

This example illustrates the fields and controls on the Browse Section Articles - Delete Confirmation page.



Note: The Delete Denied page appears if the delete cannot be performed. One or multiple conditions might prevent a delete. Only the first condition encountered is described in the error message.

Managing News Articles

This topic discusses steps to edit, view, publish and withdraw news articles. It also provides information on working with the My News Content pagelet and choosing top stories.

Pages Used to Manage News Articles

Page Name	***Definition Name***	***Usage***
My News Content Status Page	EPPCM_STAT_MAIN	View all articles that require your attention across all news publications. Articles are displayed by status: draft, pending publication, published, rejected, to be reviewed for publication, and requires rework.
My News Content Page	EPPCM_USER_MAIN	Review articles of a particular status, add new articles, and view content item property details.
Share Content Page	EPPCM_CONT_SHARE	Convert content into a *Managed Content* origin type to make it accessible for use by other Content Management features.
Publish News Articles Page	EPPCM_PBLNW_MAIN	Select articles for publishing, rework, or rejection. This page lists articles pending publication in your assigned publication sections. Move the article to appropriate section to publish it. Click the Properties link of the article and then the Locations link to access the Article Location page.
Unpublish News Articles Page	EPPCM_UPBLNW_MAIN	Withdraw a published article and return it to pending status.
Choose Top Stories Page	EPPCM_CTSNW_MAIN	Select published articles as the most prominent articles for the news publication as well as the most prominent stories by section. Top stories appear most prominently on the news publication’s homepage pagelet and when you view the contents of a news publication.

My News Content Status Page

Use the My News Content Status page (EPPCM_STAT_MAIN) to view all articles that require your attention across all news publications.

Articles are displayed by status: draft, pending publication, published, rejected, to be reviewed for publication, and requires rework.

Navigation:

Content Management > **News Publications** > **My Content Status**

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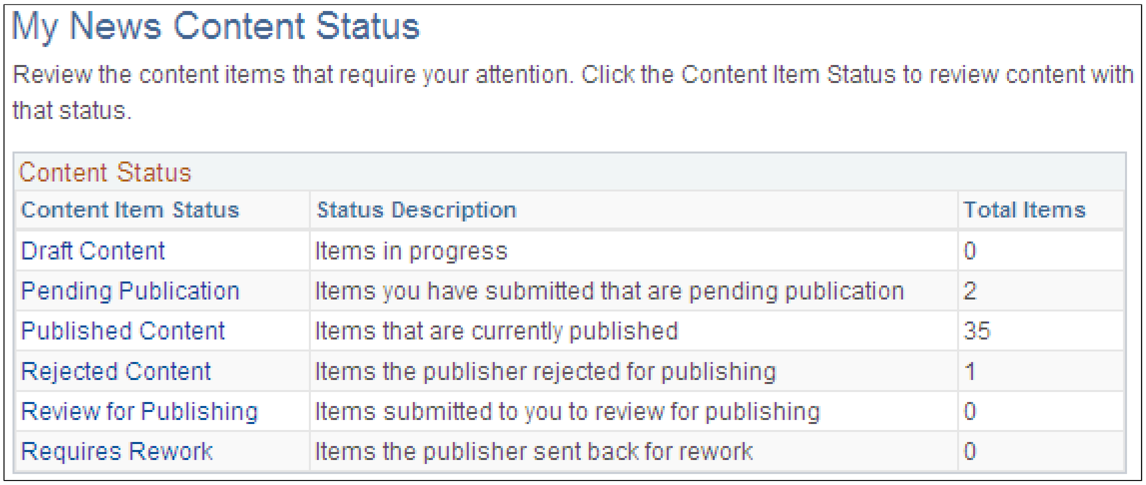
This example illustrates the fields and controls on the My News Content Status page.



Field or Control	***Description***
Content Item Status	Click a status link to access the My News Content page, where you can preview the content items for the selected status, view their property details, or add new articles.

Note: PeopleSoft Interaction hub provides a **My News Content** homepage pagelet that provides easy access to the content items that require your attention.

My News Content Page

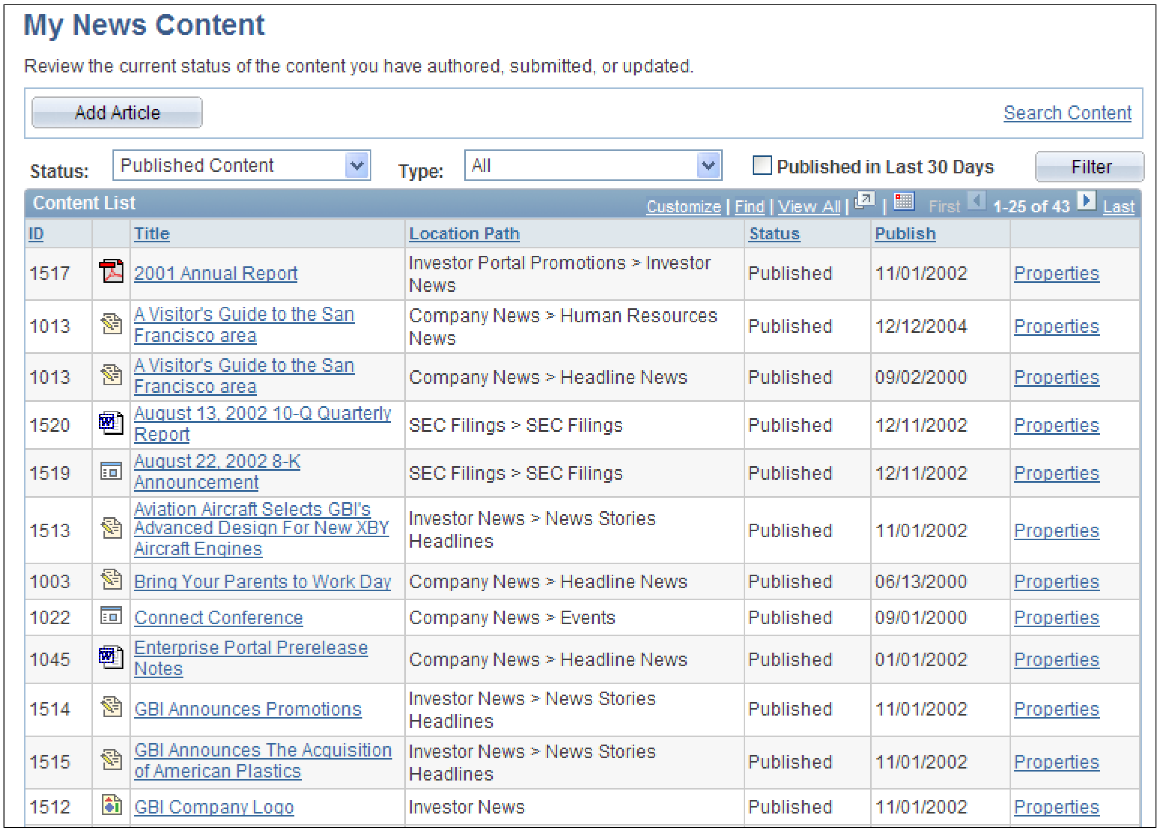
Use the My News Content page (EPPCM_USER_MAIN) to review articles of a particular status, add new articles, and view content item property details.

Navigation:

Content Management > **News Publications** > **My Content Status**

Click the content item status link on the My News Content Status page.

This example illustrates the fields and controls on the My News Content page.



Use this page to view all articles that you have authored, submitted, or updated. From this page you can edit, rework, resubmit, and add articles. You can edit all aspects of unpublished articles and modify summary information of published articles. You can narrow the list by indicating a particular type or status of content and those articles published in the last 30 days.

Field or Control	***Description***
Add Article	Select to add a new article to this section.
Status	Select to search articles with a status of *Draft, Pending, Published, Rejected, Rework,* or *All.*
Type	Select to search articles with a type of *File, Text/HTML, Web Site,* or *All.*
Published in Last 30 Days	Select to limit your search to articles published within the last 30 days.
Filter	Click to limit the number of articles displayed on the page based on the values entered for the **Status, Type,** and **Published in Lased 30 Days** fields.

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Field or Control	***Description***
Location Path	Displays the path to the article location. **Note:** Articles that are in multiple locations appear multiple times in the list.
Status	Displays the current publishing status of this article: *Draft, Pending, Publish, Reject,* or *Rework.* **Note:** You can use the **Status** drop-down list box to search based on a selected status.
Publish	Displays the date on which articles are scheduled to be published based on the folder properties for this section.
Expire	Displays the date on which articles are scheduled to expire based on the folder properties for this section.
Properties	Click to access the News Publications Properties page, where you can specify the type of content that you want to add to a section of a news publication. News publications support file attachments, managed content, text or HTML content creation, and website URLs.

Share Content Page

Use the Share Content page (EPPCM_CONT_SHARE) to convert content into a Managed Content origin type to make it accessible for use by other Content Management features.

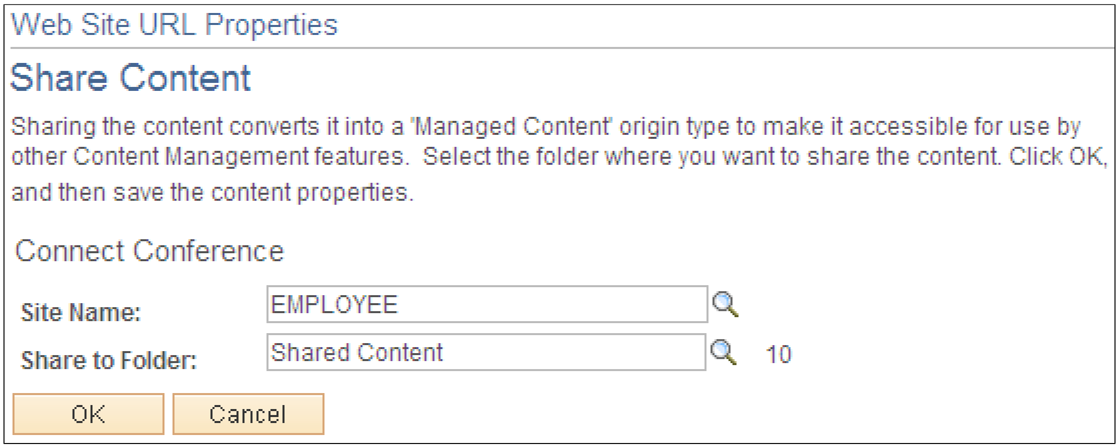
Navigation:

Content Management > **News Publications** > **Browse Publications**

Click a title link to access the folder, and then click a **Properties** link to access the content properties page.

Click the **Share Content** link on the content properties page.

This example illustrates the fields and controls on the Share Content page.



Sharing content converts it into a *Managed Content* origin type to make it accessible for use by other Content Management features. The content is placed in the system data folder *Shared Content* within the Managed Content feature, and marked as imported in the current feature. Unlike regular imported managed content, shared content remains editable from within the current feature as well as within the Managed Content feature. Sharing the content also enables version control for the content when accessed from the Managed Content feature.

To share content:

1. Click the **Share Content** link on the properties page.

   Note: The **Share Content** link is available only for news content, workspaces, documents, and categorized content.

   An example of the properties page is the Web Site URL Properties page.

2. On the Share Content page, select appropriate values and click the **OK** button.

Note: Until the content is published within the News Publication feature or Workspaces, if the content is deleted from Managed Content, the actual content is deleted, not just the location, because the origin of the content is now Managed Content.
PeopleSoft Content Management delivers a Managed Content top folder titled Shared Content. Content that is shared by means of the Share Content function is set to be copied to this folder by default. The default share folder is set on the feature definition. Only approved content can be shared. (News content is auto-approved.)

Publish News Articles Page

Use the Publish News Articles page (EPPCM_PBLNW_MAIN) to select articles for publishing, rework, or rejection.

This page lists articles pending publication in your assigned publication sections.

Navigation:

- **Content Management** > **News Publications** > **Publish Articles** > **or**

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- **Content Management** > **News Publications** > **My Content Status** > **Review for Publishing**

This example illustrates the fields and controls on the Publish News Articles page.

Note: Publishing, unpublishing, and choosing top stories can also be done directly in the Content Properties and Locations pages.
Submitted articles should be removed from the **Submitted Articles** section and must be placed in an appropriate section in order to publish them.

Field or Control	*Description*
Articles	Select appropriate articles to publish or to take any other action. **Note:** If the selection box for an article is unavailable, you cannot select this article to publish it or to take any other action. This article is in the system-generated **Submitted Articles** section, which indicates that the article was submitted by a user through the homepage pagelet of publication. Before you can publish this article, you need to move it to an appropriate section of the news publication using the Article Locations page. To access the Article Locations page, click the **Properties** link of the article, and then click the **Locations** link.
Title	Prior to taking an action on an article, click the title link to preview the article.
Properties	Click to view and modify article properties such as the viewers, associated image, locations, and so on.
Publish	Click to publish the selected articles to the News Publication pagelet according to the publish dates, location, and viewer details.

Field or Control	*Description*
Rework	Click to send the selected articles back to their authors for rework. Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken. Authors can view articles sent for rework on the My News Content page or from the **Requires Rework** link on the My News Article page. After an article is reworked, it can be resubmitted for approval.
Reject	Click to reject selected articles. If articles are rejected, they appear on the My News Content page of the author with a status of *Rejected.* Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken.

Important! Automated notifications are sent to the authors to notify them of any publishing status change of their articles.

Unpublish News Articles Page

Use the Unpublish News Articles page (EPPCM_UPBLNW_MAIN) to withdraw a published article and return it to pending status.

Navigation:

Content Management > **News Publications** > **Unpublish Articles**

Select a news publication.

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This example illustrates the fields and controls on the Unpublish News Articles page.

Note: You might want to enter a note in the Comments section of the content properties to inform the author why this action was taken.
The page automatically refreshes when you select filter criteria.

Field or Control	***Description***
Unpublish	Click to return the selected articles to the status of pending publication. Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken.
Type	Select an article type to limit the list to articles of that type only.
Published in Last 30 Days	Select this option to display only articles published within the last 30 days.
Published Articles	Use the check boxes to select the articles that you want to unpublish.

Creating and Using Tags in News Publications

Tags for news publications are displayed on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window directly without using the application view page. In these instances, tags are available only on the properties page. Application pages can be displayed only in *edit* or *view* mode.

To create and use tags for news publications:

1. Access the pages using one of the following navigations:
   - Select **Content Management** > **News Publications** > **Browse Publications.**
   - Select **My Content** > **My News Content.**
2. Select the content property link to view the content.
3. Click an appropriate link to view, edit, or add a tag.
4. Enter the tag name, and click the **Update Tags** button.

Pagelet Wizard news publications—for example, Company News—display tags for top stories only. The number of tags to display for each story should be limited to three due to limited screen space.

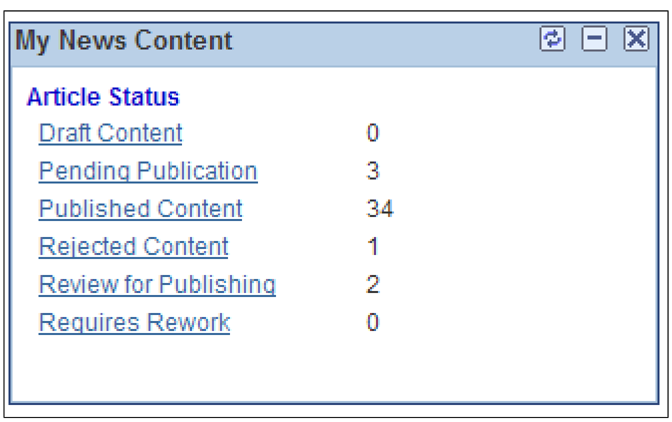
Note: Security considerations: All users who have access to the content will have the add and view tag permissions. Users who are assigned the Administrator, Manager, or Publisher role will also be given modify permissions.

See “Understanding Tagging in PeopleSoft Interaction Hub” (Using Portal Features).

My News Content Pagelet

Access the My News Content pagelet (click the **Content** link on the menu bar on the homepage, and then select the **My News Content** option in the Personalize Content page).

This example illustrates the fields and controls on the My News Content pagelet.



The My News Content pagelet provides an alternate access path to the My News Content page and to the Publish News Articles page. The Personalize Content page enables you to select the pagelets that you want to appear on your homepage. Optionally, you can personalize the name of your homepage tab and add a welcome message.

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Field or Control	*Description*
Article Status	Displays the same information that is in the My News Content Status page. Click a content status link to access the My News Content page, where you can access the news content item in the selected status. • **Draft Content:** Click to view all draft of new content. • **Submitted Content:** Click to view news content that you have submitted for approval that is not yet approved. • **Published Content:** Click to view news content that has been published. • **Rejected Content:** Click to view news content that you have submitted for approval that has been rejected. • **Review for Publishing:** Click to view news content items submitted to you for approval and publication. • **Requires Rework:** Click to view news content items that are returned to you from an approver who has requested that you rework the content. The number adjacent to the content status link indicates the number of content items in the folder.

Choose Top Stories Page

Use the Choose Top Stories page (EPPCM_CTSNW_MAIN) to select published articles as the most prominent articles for the news publication as well as the most prominent stories by section.

Top stories appear most prominently on the news publication's homepage pagelet and when you view the contents of a news publication.

Navigation:

Content Management > **News Publications** > **Choose Top Stories**

Select a news publication.

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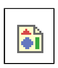
This example illustrates the fields and controls on the Choose Top Stories page.

Field or Control	***Description***
Article	Click the Article link for an article to preview the article.
	The Image icon indicates that the article has an associated image. Click to preview the associated image as well as get the information of the associated image.
Publication Top Story	Select to place the article in the publication's top story section, at the top of the pagelet. **Note:** Publication top stories should have associated images. If you publish the top story without associating an image, the article appears in the News Publication pagelet with a blank space in the column where the image would ordinarily be located, resulting in an odd-looking layout.
Section Top Story	Select to place an article in the 3-column display when a section is clicked. You can navigate to the section page by clicking the section title on the pagelet.
Display Order	Enter the numeric order of appearance. Publication top stories are displayed at the top of the publication pagelet on the homepage. Section top stories are displayed in the center column when you are viewing the publication section. The display order determines the numeric order in which the top story articles appear. Publication top stories should have an image associated with them.
Properties	Click to access the article details and the article's associated image.

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Related Links

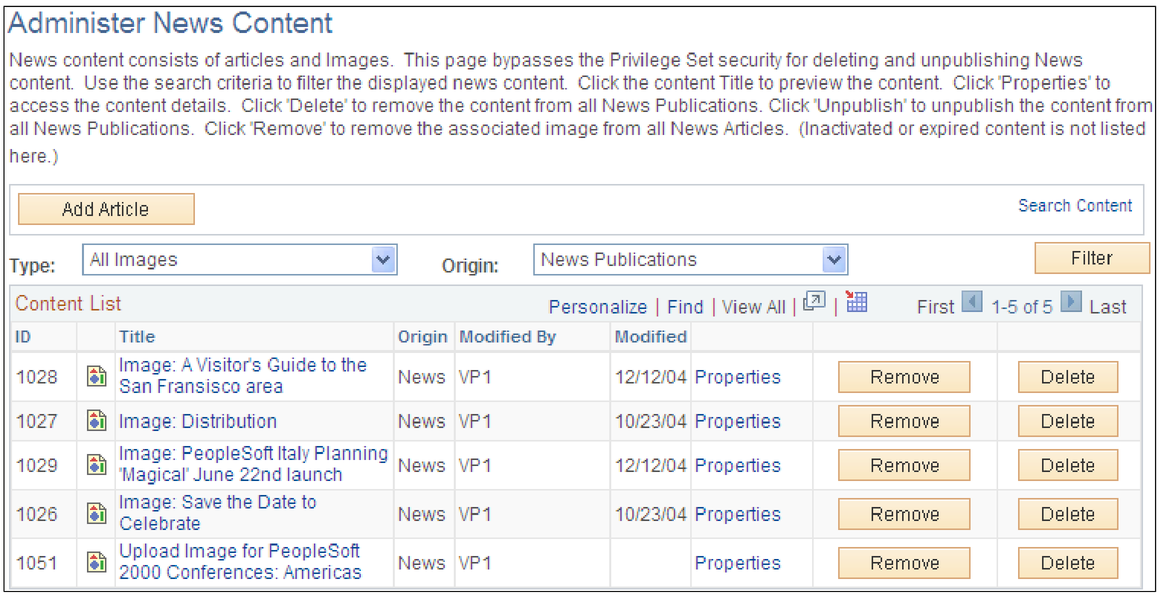
Associating Images with News Articles

Administering News Content

This section discusses how to administer news content.

Access the Administer News Content page (EPPCM_ADMN_MAIN) (select **Content management** > **News Publications** > **Administer Content).**

This example illustrates the fields and controls on the Administer News Content page.



Use this page to bypass privilege set security to preview content, view content property details, remove content, or unpublish content from all news publications.

Note: Archived or expired content is not listed on this page.

Field or Control	***Description***
Add Article	Click to add a new article to this section.
Filter	Click to limit the number of articles displayed on the page based on the values entered for the **Type** and **Origin** fields.
Title	Click to preview the content details.
Properties	Click to access the content property details.

Field or Control	*Description*
Origin	Displays where the article originated: • *News* indicates the article was created from the News Publications feature. • *Managed* indicates articles that were imported from Managed Content.
Unpublish and **Expire**	Click to unpublish the content from all news publications. Unpublishing the content does not remove it from the news sections. It remains available for future publishing or deletion.
Remove	Click to remove the associated image from all news articles. Removing the image removes it from any news article. It does not delete it from the Content Management system.
Delete	Click to remove the content from all news publications. Deleting the article permanently deletes it from the Content Management system if its origin is News Publication. If it is imported managed content, deleting it removes only the News Publication locations and not the content item itself.

Publishing News Publications

This topic provides an overview of methods to publish News Publications.

Pages Used to Publish News Publications as Pagelets

Page Name	*Definition Name*	*Usage*
Publications Properties - Publish Pagelet Wizard Definition Page	EPPPB_PGLT_PUB	Create a pagelet definition for news publications.
Preview Pagelet	EPPPB_PGLT_PREVIEW	Preview a list pagelet.
Pagelet Wizard - Specify Pagelet Information Page	PTPPB_WIZ_INFO	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source Page	PTPPB_WIZ_DATASRC	Select the type of data source for the pagelet.

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Page Name	*Definition Name*	*Usage*
Pagelet Wizard - Specify Data Source Parameters Page	PTPPB_WIZ_DATAPRMS	Configure the data source parameters that are required for data to be displayed in the pagelet. This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.
Pagelet Wizard - Specify Data Source Parameter Values Page	PTPPB_WIZ_PRMVALS	Specify prompt values for the end user to select from when personalizing the pagelet. This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.
Pagelet Wizard - Select Display Format Page	PTPPB_WIZ_DISPFRMT	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options Page	PTPPB_WIZ_DISP_CUS	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options Page	PTPPB_WIZ_PUBOPT	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Confirm that the creation of the pagelet is complete.
Publications Properties - Publish as Pagelet Page	EPPCM_CATG_PGLT	Administer pagelet definitions for an action item list.
Publish to Multiple Portals Page	PTPP_PMPUBPRTL	Publish the pagelet definition to additional portals and sites. See Publishing to Multiple Portals and Pubishing Multiple Pagelets
Publish Multiple Pagelets Page	PTPP_PMPUBPGLT	Publish multiple pagelet definitions to another portal or site. See Publishing to Multiple Portals and Pubishing Multiple Pagelets

Page Name	Definition Name	Usage
Publications Properties - Advanced Feed Options Page	EPPCM_FEED_ADVOPT	Set up advanced options to publish a news publication in the content management system so that it is accessible as a feed.

Understanding Methods to Publish News Publications

Two methods are available to publish a news publication:

1. Use the Publish Pagelet Wizard Definition page.

   You use the Publish Pagelet Wizard Definition page to publish a news publication as a pagelet to a site or portal. News publication publishing features include:

   - The pagelet folder in which the news publication will be available.
   - The homepage tabs on which the pagelet will be available.
   - The pagelet behavior (optional, optional-default, required-fixed, or required).

2. Use the Pagelet Wizard pages.

   The Pagelet Wizard guides you through six steps to create or update a News Publication homepage pagelet.

   - Step 1: Specify pagelet information.
   - Step 2: Select data source.
   - Step 3: Specify data source parameters.
   - Step 4: Select display format.
   - Step 5: Specify display options.
   - Step 6: Specify publishing options.

Publications Properties - Publish Pagelet Wizard Definition Page

Use the Publications Properties - Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to create a pagelet definition for news publications.

Navigation:

- Content Management, News Publications, Browse Publications

  Click the **Properties** link for the news publication.

  Click the **Publish as Pagelet** link on the Folder Properties page.

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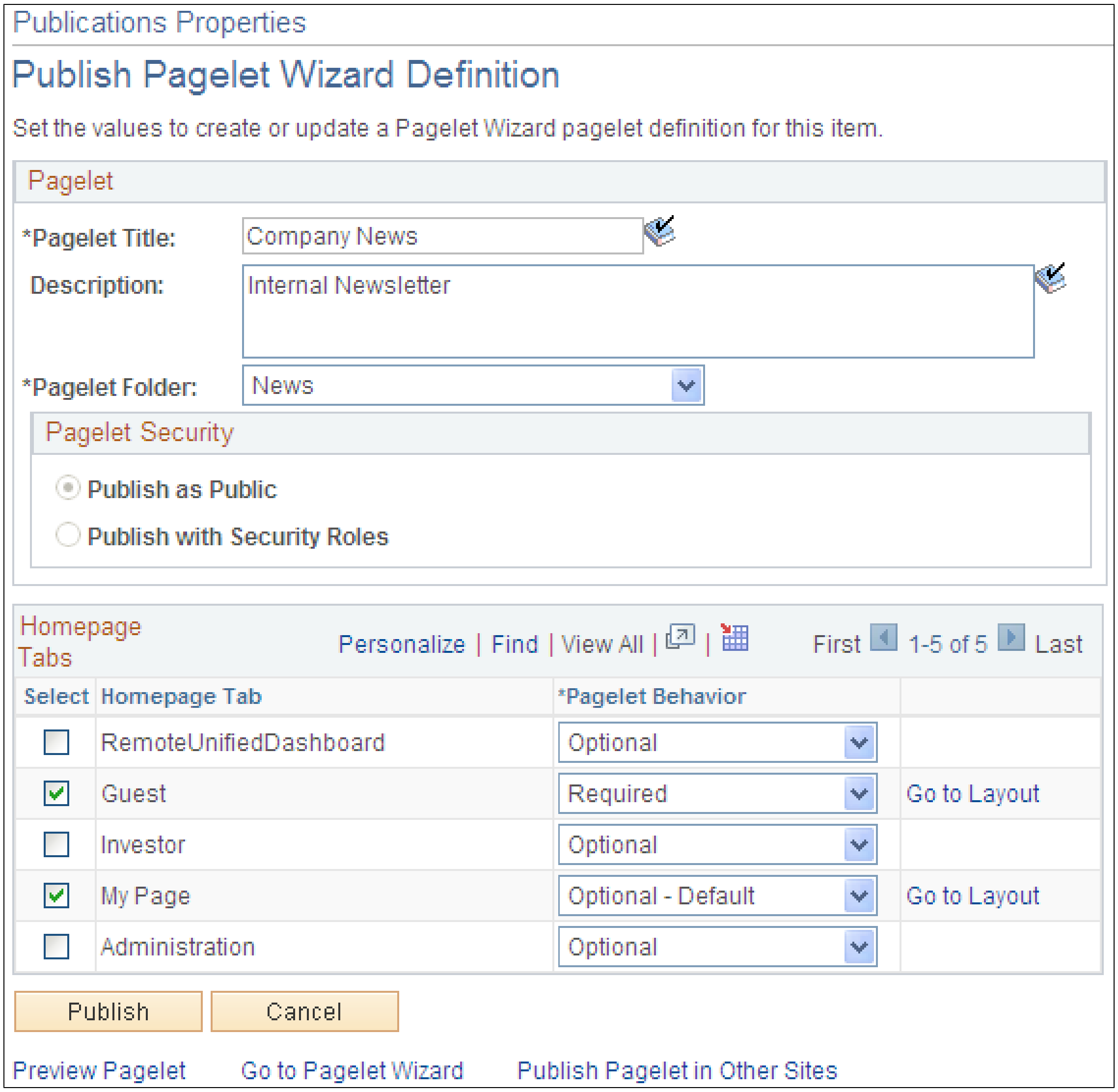
- Click the **Add Pagelet** button or the **Edit** button on the Publications Properties - Publish as Pagelet page.

This example illustrates the fields and controls on the Publications Properties - Publish Pagelet Wizard Definition page.



Pagelet

The pagelet title and description from the Folder Properties page appear in the pagelet section. You can edit these two fields as necessary.

Field or Control	***Description***
Pagelet Title	Enter the pagelet title that will identify the pagelet.
Description	Enter a meaningful description for this pagelet.

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Field or Control	*Description*
Pagelet Folder	Select a folder in which this news publication pagelet will be available. Only folders from the current site are available to select. See *PeopleTools: PeopleSoft Applications User's Guide*, "Setting User Preferences", for more information about pagelet folder.."
Pagelet Security	Select the security options for viewing the pagelet. Available options are: • *Publish as Public,* which enables all users to view the pagelet. • *Publish with Security Roles,* which uses the roles defined on the Folder Security page when publishing the pagelet. **Note:** If no roles are defined on the Folder Security page, the system automatically selects to publish the pagelet as *Public.*

Homepage Tabs

Use the Homepage Tabs section to define the homepage tab labels and behavior for the pagelet.

Field or Control	*Description*
Homepage Tab	Select the tabs that will display the pagelet.

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Field or Control	*Description*
Pagelet Behavior	Select the behavior options for the pagelet. The available options are: • *Optional* The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges. • *Optional-Default* The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges. • *Required-Fixed* The pagelet will appear on all user homepages if users have access to the pagelet. The placement of the pagelet cannot be changed, and the pagelet cannot be removed from the homepage. • *Required* The pagelet will appear on all user homepages if the user has access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.
Publish	Click to display the Publish as Pagelet page, where you can review or edit the pagelet definition. See Publishing a Folder or Content Item as a Pagelet.

Publishing a News Publication from Pagelet Wizard

Pagelets for news publication can be created and published using Pagelet Wizard and then managed from the Folder Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

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- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note: If you access Pagelet Wizard from the **Go to Pagelet Wizard** link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a folder as a pagelet. The PeopleTools 8.53 PeopleBooks provide detailed information on using Pagelet Wizard.

See *PeopleTools: PeopleTools Portal Technologies* “Using Pagelet Wizard to Create and Manage Pagelets” for more information about publishing a news publication from pagelet wizard.

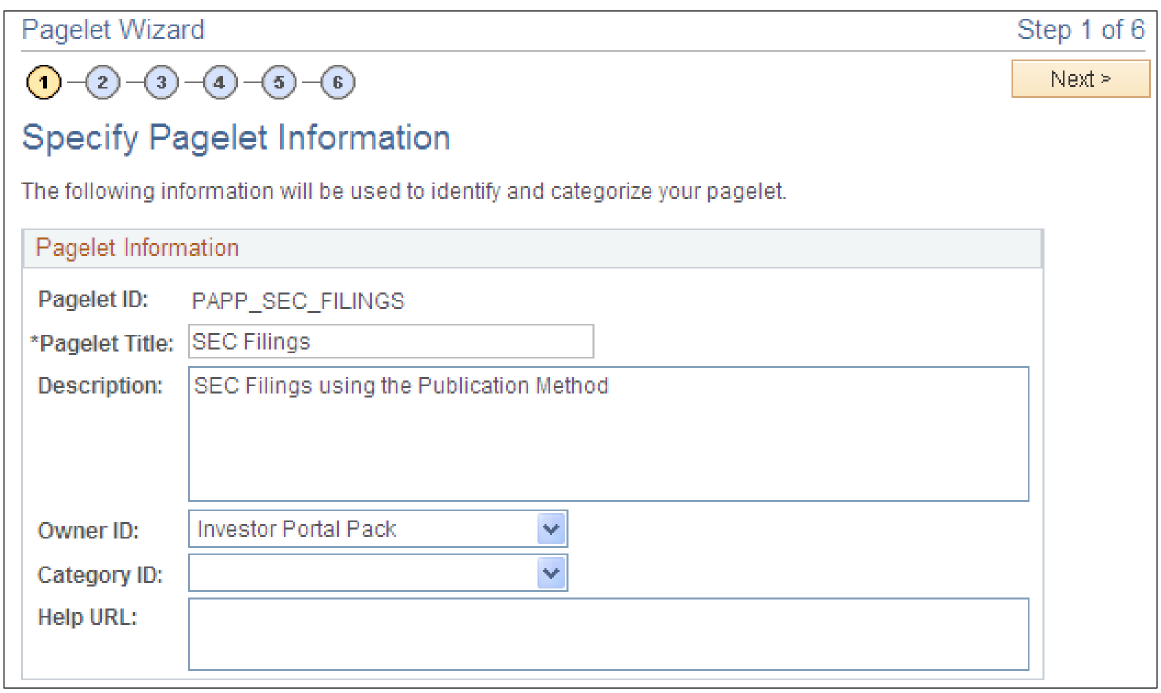
Pagelet Wizard - Specify Pagelet Information Page

Use the Pagelet Wizard - Specify Pagelet Information page (PTPPB_WIZ_INFO) to provide information to identify and categorize a pagelet.

Navigation:

- Click the **Go to Pagelet Wizard** link on Publications Properties - Publish Pagelet Wizard Definition page.
- Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard
- PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard
- Click the **Pagelet Information** button from any page in the wizard.

This example illustrates the fields and controls on the Pagelet Wizard - Specify Pagelet Information page.



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Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *PeopleTools: PeopleTools Portal Technologies*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 1: Entering Pagelet Identifying Information for more information about entering pagelet identifying information.

Pagelet Wizard - Select Data Source Page

Use the Pagelet Wizard - Select Data Source page (PTPPB_WIZ_DATASRC) to select the type of data source for the pagelet.

Navigation:

- Click the **Next** button on the Pagelet Wizard - Specify Pagelet Information page.
- Click the **Data Type** button from any page in the wizard.

This example illustrates the fields and controls on the Pagelet Wizard - Select Data Source page (News Publications data type).

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

Field or Control	***Description***
Data Type	Use the *News publications* data type (NEWS PUBLICATION) to make a Pagelet Wizard pagelet a publishing vehicle for content from a news publication. News publication data source pagelets are compatible with the custom display format. If you select the *News publications* option, the **Publication ID** and **Publication Name** fields appear. See *PeopleTools: PeopleTools Portal Technologies*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 2: Selecting a Pagelet Data Type for more information about selecting a pagelet data type.
Publication ID	Select the news publication that you want to use as the data source for the pagelet. Available news publications are created in the News Publications component.
Publication Name	Displays the name of the news publication.

See *PeopleTools: PeopleTools Portal Technologies*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 2: Selecting a Pagelet Data Type for more information about selecting a pagelet data..

Pagelet Wizard - Specify Data Source Parameters Page

Use the Pagelet Wizard - Specify Data Source Parameters page (PTPPB_WIZ_DATAPRMS) to configure the data source parameters that are required for data to be displayed in the pagelet.

Navigation:

- Click the **Next** button on the Pagelet Wizard - Select Data Source page.
- Click the **Data Source Parameters** button from any page in the wizard.

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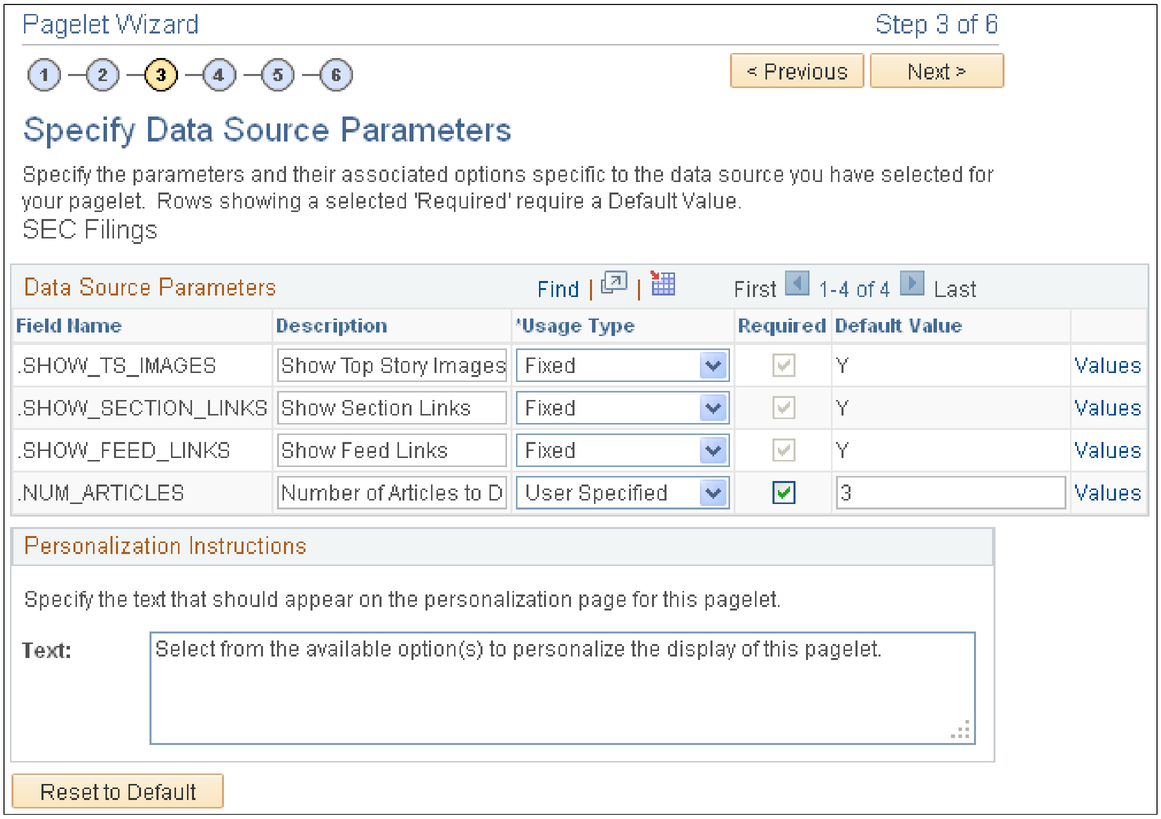
This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameters page (News Publication data source).



Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note: This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field or Control	***Description***
Field Name	Displays the name of the data source parameter. • *.SHOW_TS_IMAGES:* Set the **Default Value** field to *Y* if you want the pagelet to display images for top stories for the news publication. • *.SHOW_SECTION_LINKS:* Set the **Default Value** field to *Y* if you want the pagelet to display links to sections in the news publication. • *.SHOW_FEED_LINKS:* Set the **Default Value** field to *Y* if you want the pagelet to display feed links. • *.NUM_ARTICLES:* Set the **Default Value** field to the number of articles that you want the pagelet to display.
Description	Displays a description of the data source parameter.

Field or Control	***Description***
Usage Type	Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are: • *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the **Configure** link on the published pagelet and select from those parameters for users. • *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field. If you change the usage type from or to *Context Sensitive* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet. • *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify. • *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter. For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the **User** field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet. • *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the **Customize** button appears on the pagelet title bar. End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Uers can select a value from a prompt, or they can manually enter their own value if no prompt values are available. See "Publishing an Action Item List as a Pagelet" (Using Portal Features). If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.
Required	This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

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Field or Control	Description
Default Value	You can enter a value that includes the % and * wildcards at the beginning or end of a value in the **Default Value** field. Note the following about default values: • If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value. If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field. If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.* • If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the **Look up Value** button to access a list of valid system variables. See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets, ” Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters. • If you select *Fixed* as the usage type, you must enter the fixed value.
Values	If you select *User Specified* or *Admin Specified* as the usage type, click **Values** to access the Pagelet Wizard - Specify Data Source Parameter Values page. See “Publishing an Action Item List as a Pagelet” (Using Portal Features).
Text	Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet. **Note:** Personalization instructions must be translatable.

Pagelet Wizard - Specify Data Source Parameter Values Page

Use the Pagelet Wizard - Specify Data Source Parameter Values page (PTPPB_WIZ_PRMVALS) to specify prompt values for the end user to select from when personalizing the pagelet.

Navigation:

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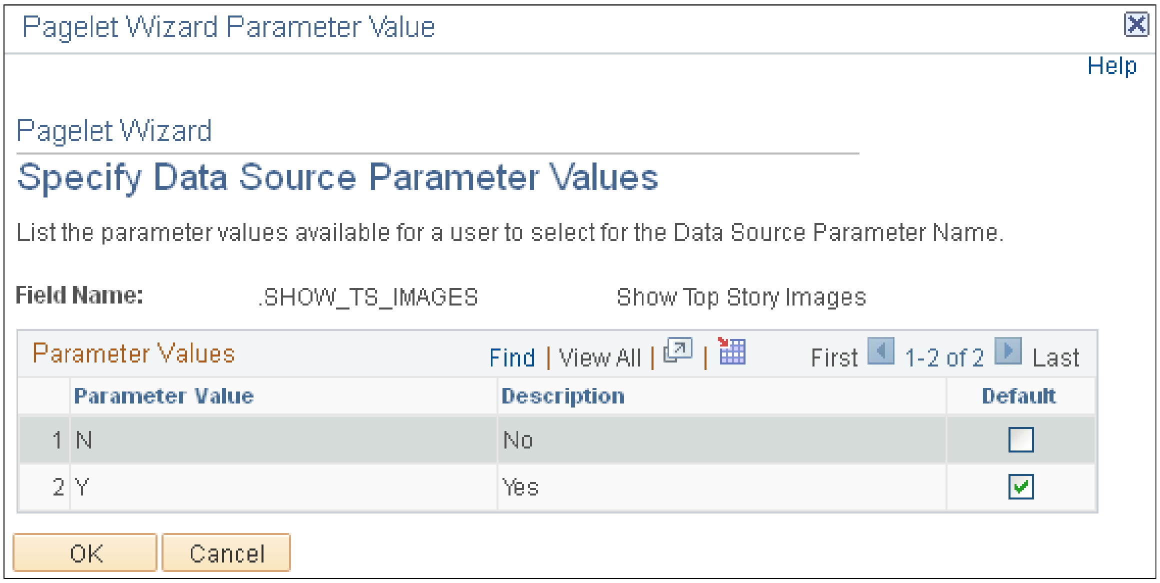
Click the **Values** link on the Pagelet Wizard - Specify Data Source Parameters page.

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameter Values page (News Publications data source)..



Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Field or Control	***Description***
Parameter Value	Specify the parameter value.
Description	Provide an optional description of the parameter value.
Default	Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 3: Specifying Data Source Parameters for more information about data source parameters.

Pagelet Wizard - Select Display Format Page

Use the Pagelet Wizard - Select Display Format page (PTPPB_WIZ_DISPFRMT) to specify the data transformation method and display format for the pagelet.

Navigation:

- Click the **Next** button on the Pagelet Wizard - Specify Data Source Parameters page.
- Click the **Display Format** button from any page in the wizard.

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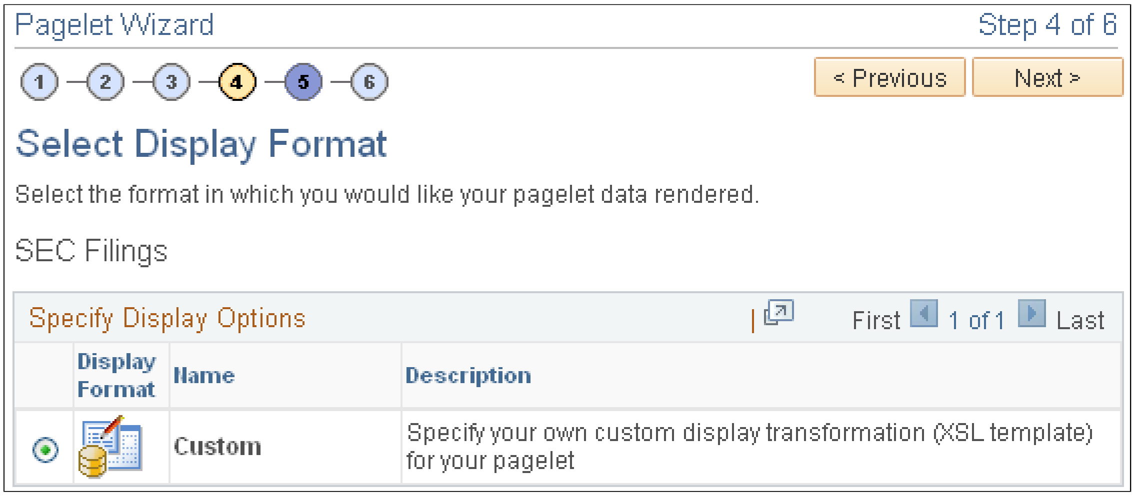
This example illustrates the fields and controls on the Pagelet Wizard - Select Display Format page.



Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

Field or Control	***Description***
Custom	Select to specify a custom display transformation (XSL template) for your pagelet.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 4: Selecting a Pagelet Display Format for more information about pagelet display format.

Pagelet Wizard - Specify Display Options Page

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the **Next** button on the Pagelet Wizard - Select Display Format page).

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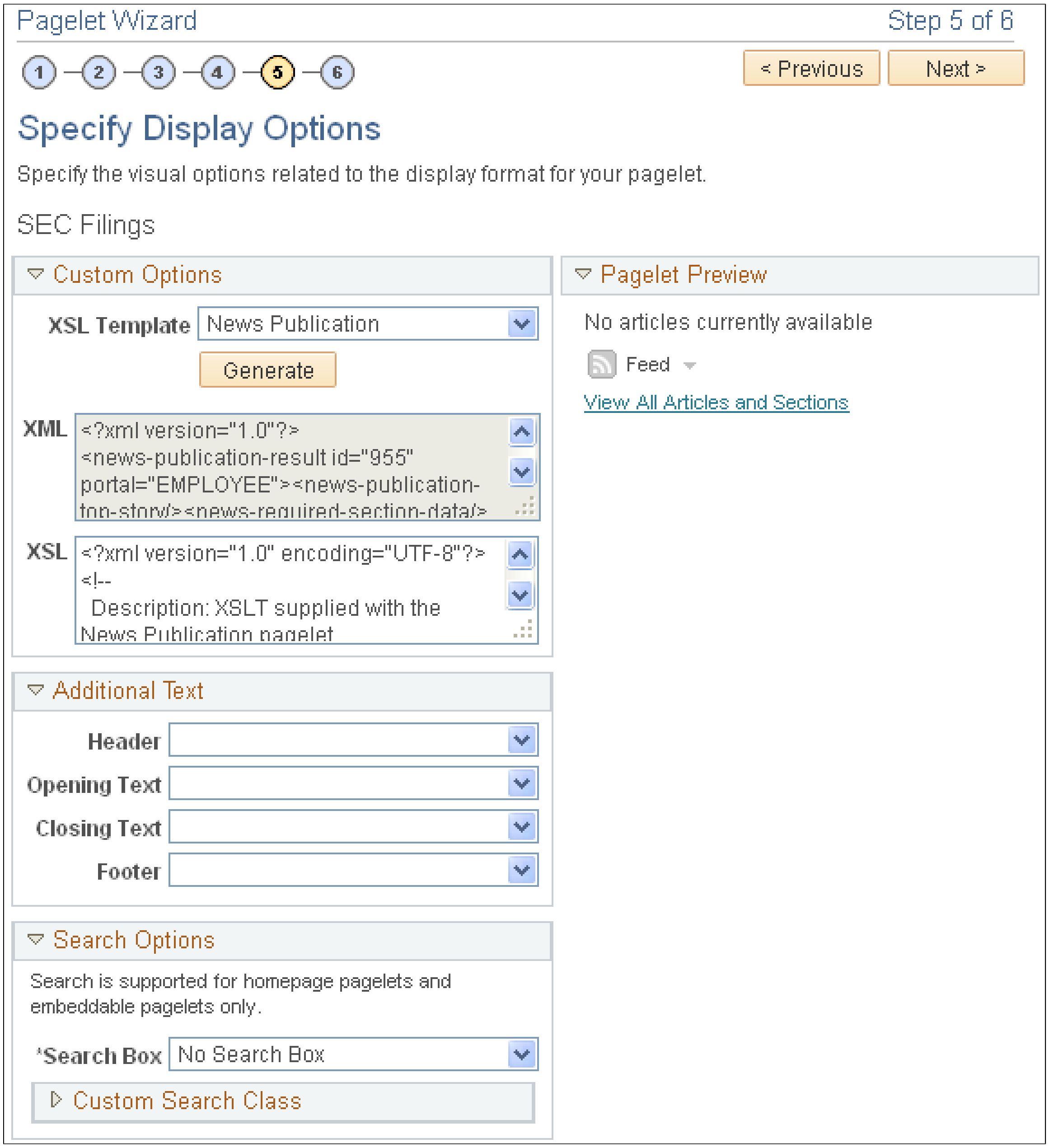
This example illustrates the fields and controls on the Pagelet Wizard - Specify Display Options page.



Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

Note: If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 5: Specifying Pagelet Display Options for more information about pagelet display options.

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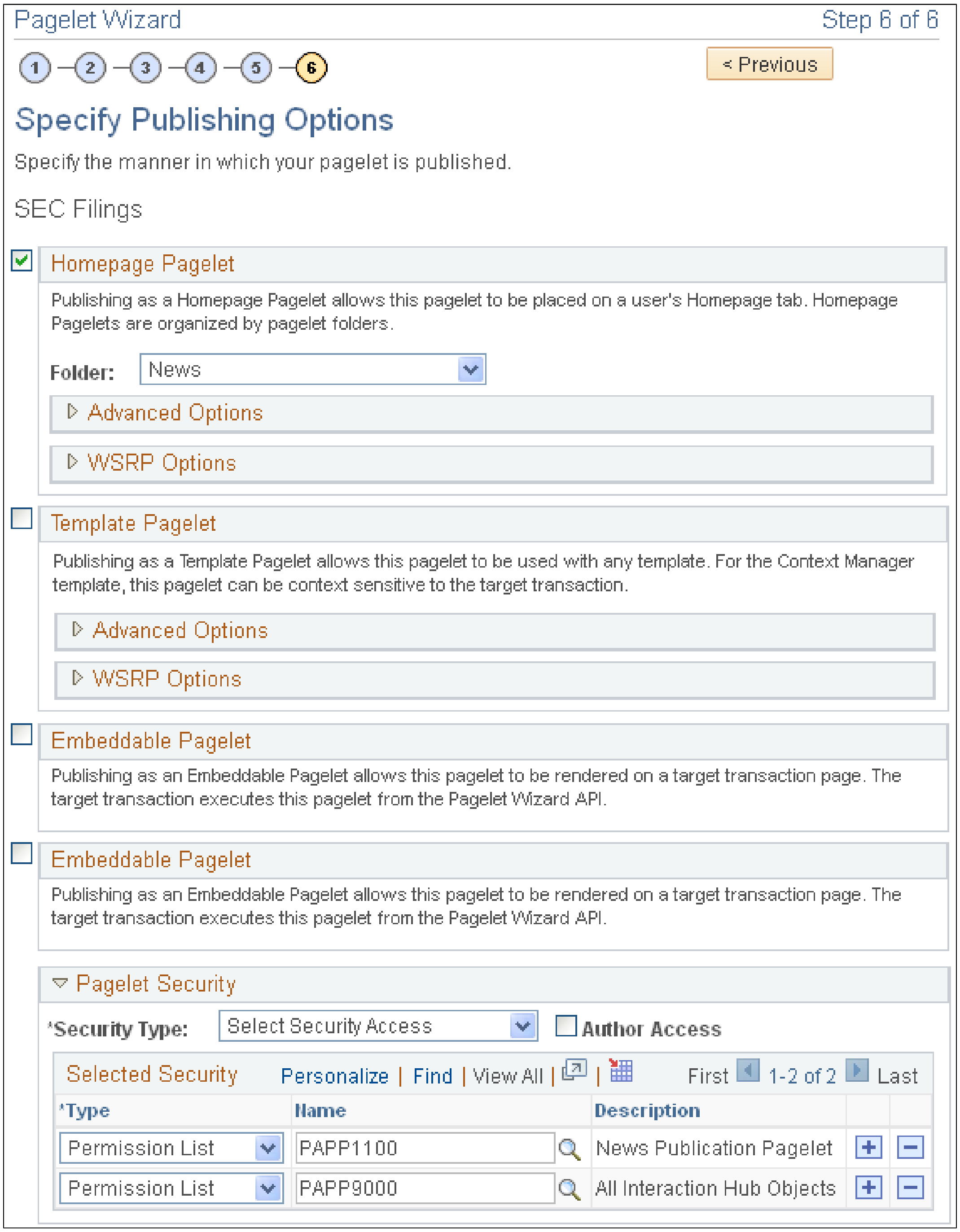
Pagelet Wizard - Specify Publishing Options Page

Access the Pagelet Wizard - Specify Publishing Options page (click the **Next** button on the Pagelet Wizard - Specify Display Options page).

This example illustrates the fields and controls on the Pagelet Wizard - Specify Publishing Options page.



Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

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See *PeopleTools: PeopleTools Portal Technologies*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 6: Specifying Pagelet Publication Options for more information about pagelet publication options.

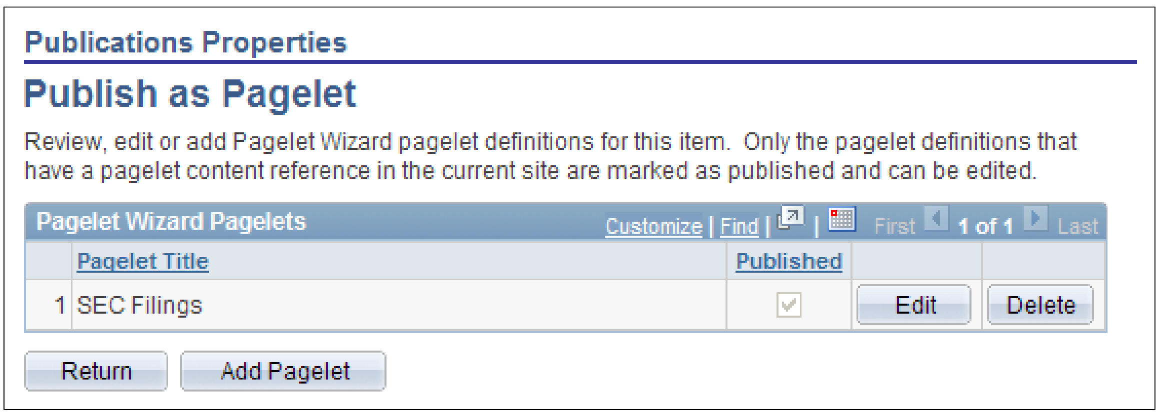
Publications Properties - Publish as Pagelet Page

Use the Publications Properties - Publish as Pagelet page (EPPCM_CATG_PGLT) to administer pagelet definitions for an action item list.

Navigation:

- Click the **Publish** button on the Publications Properties - Publish Pagelet Wizard Definition page.
- If this action item list has already been published as a pagelet, click the **Publish as Pagelet** link on the Folder Properties page.

This example illustrates the fields and controls on the Publications Properties - Publish as Pagelet page.



Use the Publications Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this news publication. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note: Pagelets for this news publication published directly from Pagelet Wizard also appear in this list.

Field or Control	***Description***
Published	Indicates the whether the pagelet is published.
Edit	Click to access the Publications Properties - Publish Pagelet Wizard Definition page, where you can edit pagelet definitions.
Delete	Deletes this pagelet definition and the published pagelet content references in all sites.

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Field or Control	Description
Add Pagelet	Click to access the Publications Properties - Publish Pagelet Wizard Definition page, where you can publish content as a pagelet to a site or portal.

Publishing to Multiple Portals and Pubishing Multiple Pagelets

Use the Publish Multiple Pagelets page (PTPP_PMPUBPGLT) to publish multiple pagelet definitions to another portal or site.

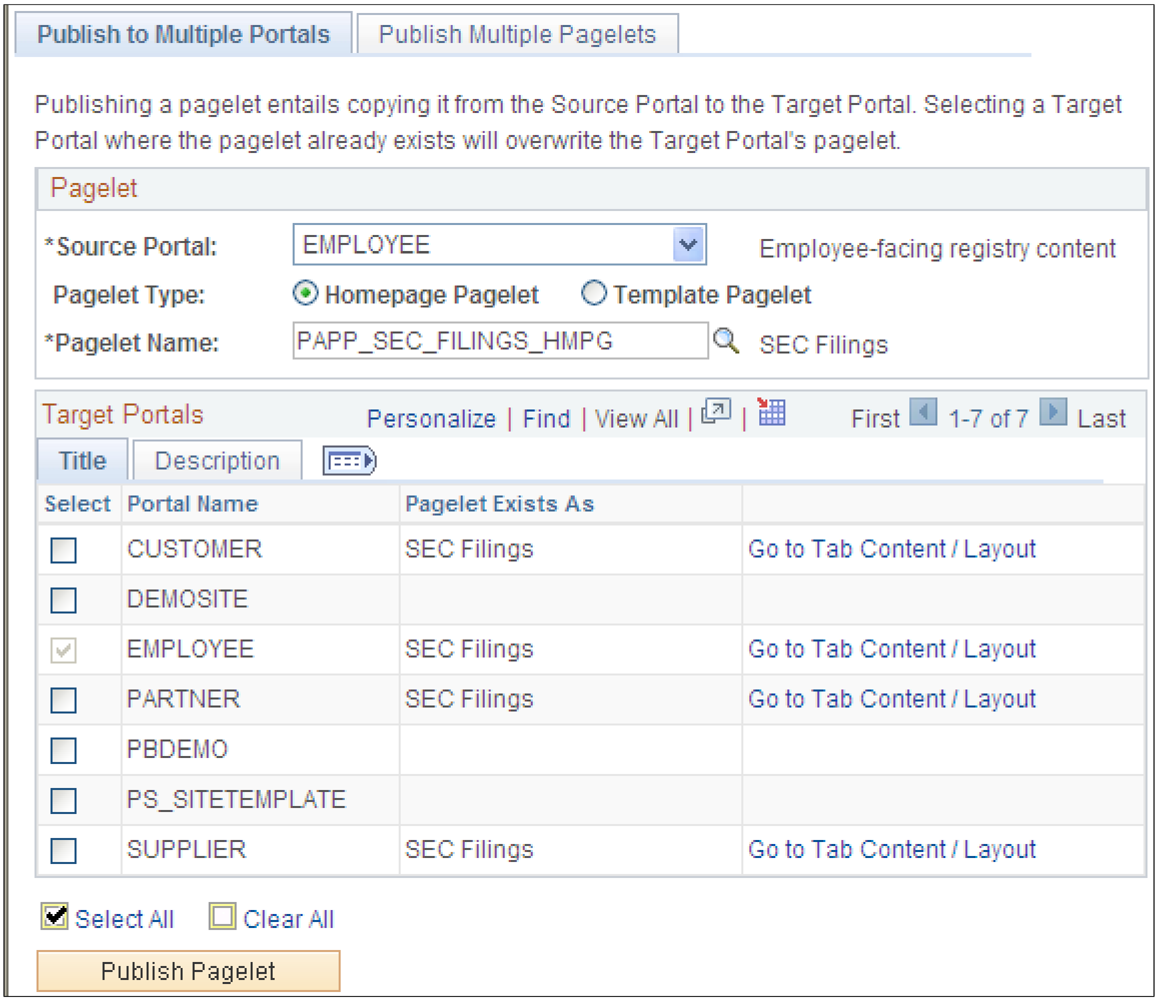
Navigation:

- On the Publish to Multiple Portals page, select the Publish Multiple Pagelets tab.
- Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.

This example illustrates the fields and controls on the Publish to Multiple Portals page.



- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

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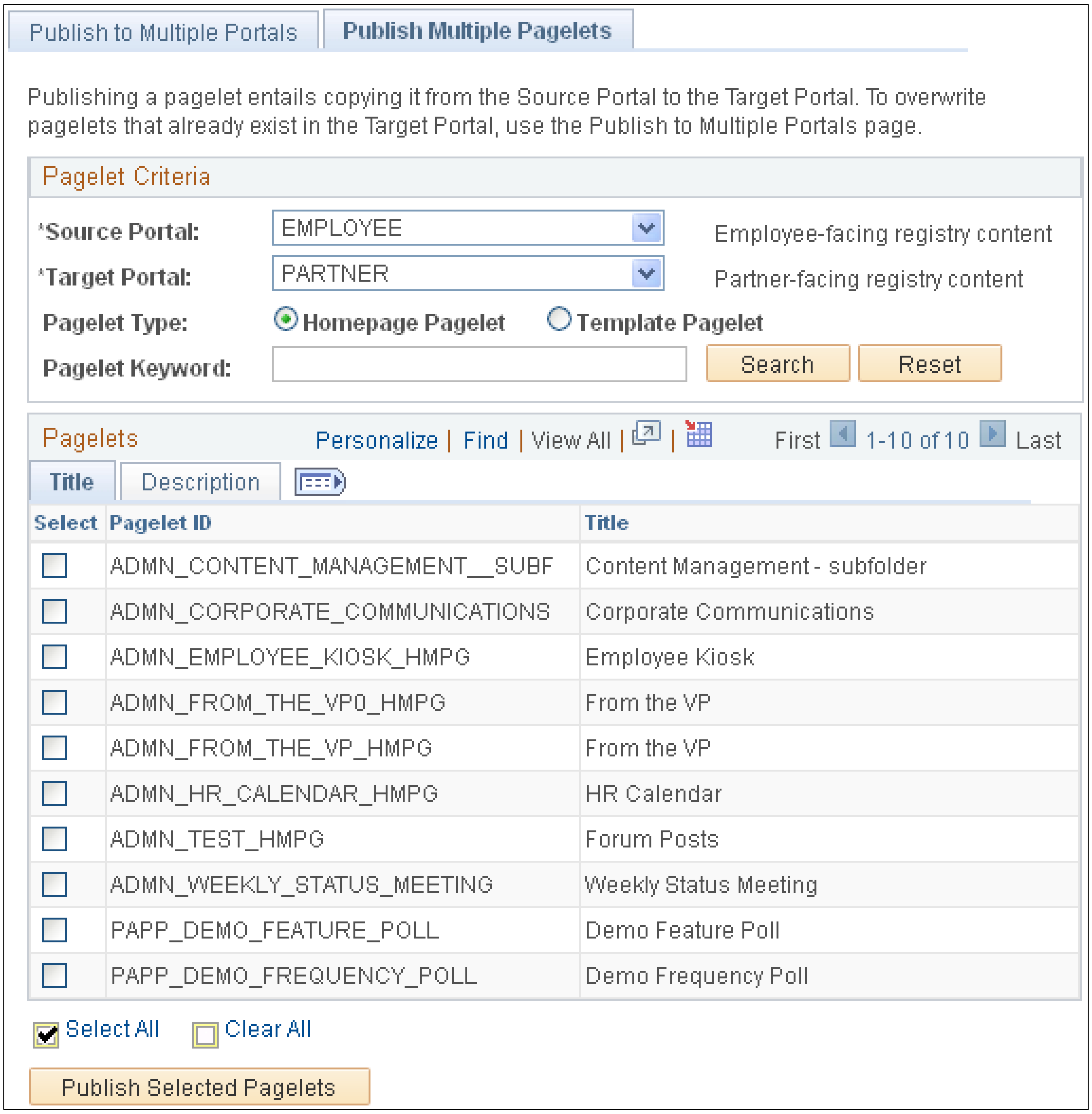
This example illustrates the fields and controls on the Publish Multiple Pagelets page.



See *PeopleTools: PeopleTools Portal Technologies*, "Working With Navigation Pages," Publishing Pagelets for more information about publishing a pagelet to multiple portals.

Publications Properties - Advanced Feed Options Page

Use the Publications Properties - Advanced Feed Options page (EPPCM_FEED_ADVOPT) to set up advanced options to publish a news publication in the content management system so that it is accessible as a feed.

Navigation:

Content Management > **News Publications** > **Browse Publications**

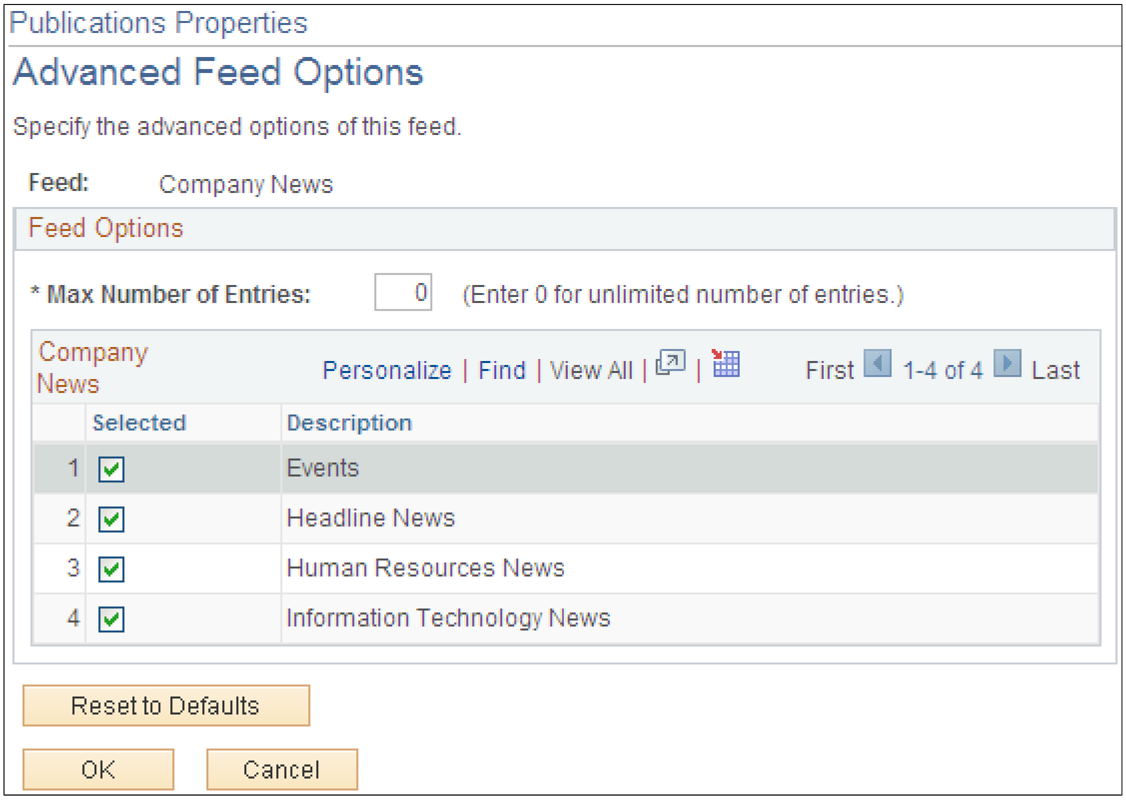
Click the **Properties** link.

Click the **Publish as Feed** link on the Folder Properties page.

Click the **Add Feed** button or the **Edit** button on the Publications Properties - Publish as Feed page.

Click the **Advanced Options** link on the Publications Properties - Publish Feed Definition page.

This example illustrates the fields and controls on the Publications Properties - Advanced Feed Options page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Max Number of Entries (maximum number of entries)	Specify the maximum number of feed entries that you want to display in the feed document.
Selected	Select appropriate folders to be included in the feed.
Reset to Defaults	Click to reset all parameters: **Max Number of Entries** is back to *10,* and subfolder is *selected.*
OK	Click to return to the Publications Properties - Publish Pagelet Wizard Definition page, and then click the **Publish** button to save and publish this content item as feed.

See "Publishing PeopleSoft Interaction Hub Content as a Feed" (Using Portal Features).

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Viewing News Publications

This topic discusses steps to view, upadte and submit news articles.

Pages Used for Viewing News Publications

Page Name	***Definition Name***	***Usage***
News Publication Details Page	EPPCM_NWDSPSEC	View information in a focused format, incorporate news and images, and designate top stories to emphasize content.
View Expired Articles Page	EPPCM_NWDSPARC	View all expired news publications that have become inactive.
View All Articles and Sections Page	EPPCM_NWDSPALL	View all active articles and sections of the selected news publication pagelet.
Submit News Articles - Add News Article Page	EPPCM_ADDCONT_SEC	Select the type of content to add. Select Managed Content to import existing content into the News Publication feature.
Submit News Articles Page	EPPCM_SBMTNW_MAIN	View basic information about the articles within a section and drill down to article details. Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles.

Company News Pagelet

View the Company News pagelet (click the **Content** link from the menu bar on the Homepage, and then select any news publication option in the Personalize Content page).

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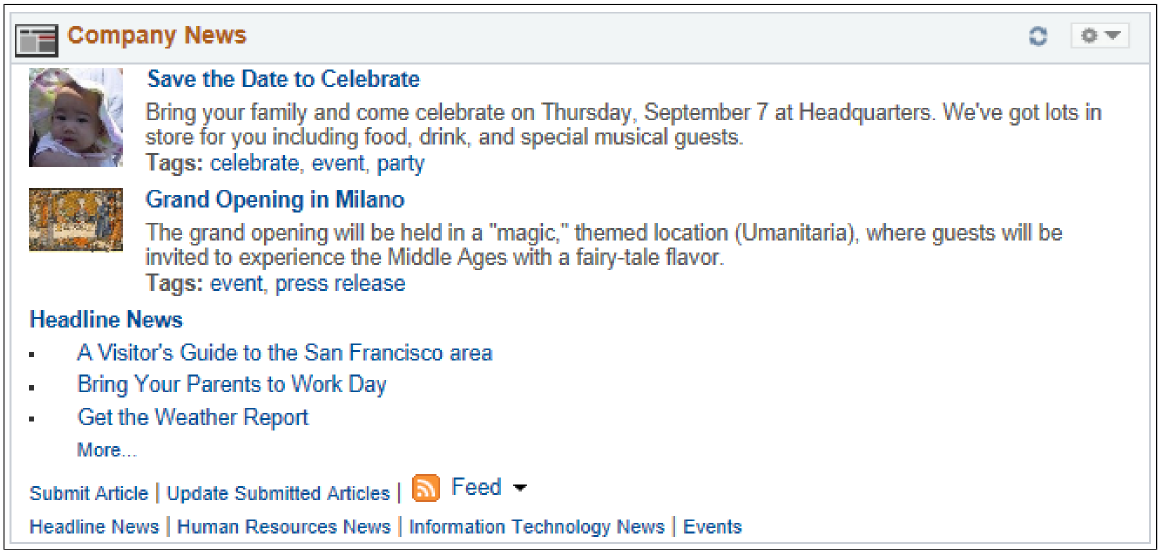
This example illustrates the fields and controls on the Company News pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
<News title links>	Click to access the News Publication Details page, where you can view the details of each news publication.
Submit Article	Click to access the Submit News Articles - Add News Article page, where you can select the type of content to add. See Submit News Articles - Add News Article Page.
Update Submitted Articles	Click to access the Submit News Articles page, where you can view and edit basic information about the articles within a section and drill down to article details. **Note:** Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles. See Submit News Articles - Add News Article Page.
Feed	Click to open the feed for this item, if available. See “Publishing PeopleSoft Interaction Hub Content as a Feed” (Using Portal Features).
More...	Click to access the news publication details page, where you can access the **View All Articles and Sections** link to view all active articles and sections of the selected news publication pagelet. See View All Articles and Sections Page.

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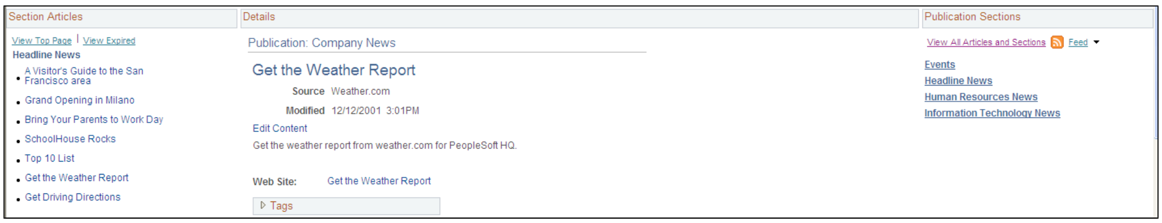
News Publication Details Page

Use the News Publication Details page (EPPCM_NWDSPSEC) to view information in a focused format, incorporate news and images, and designate top stories to emphasize content.

Navigation:

In the Homepage, click any section or article title link in the news publication pagelet—for example, Company News pagelet.

This example illustrates the fields and controls on the News Publication Details page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
My Links	Click to access the View My Links page, where you can view all of your saved links.
View Top Page	Click to view published articles that appear more prominently on the News Publication homepage pagelet.
View Expired	Click to view all expired news publications that have become inactive.
Edit Content	Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location. See Feature Definitions Page.
Tag	Click to expand and access the content properties to view or edit tags. See “Understanding Tagging in PeopleSoft Interaction Hub” (Using Portal Features).
View Articles and Sections	Click to access the View All Articles and Sections page, where you can view all active articles and sections of the selected news publication pagelet. See View All Articles and Sections Page.

Field or Control	***Description***
Feed	Click to open the feed for this publication, if available. See “Publishing PeopleSoft Interaction Hub Content as a Feed” (Using Portal Features).

View Expired Articles Page

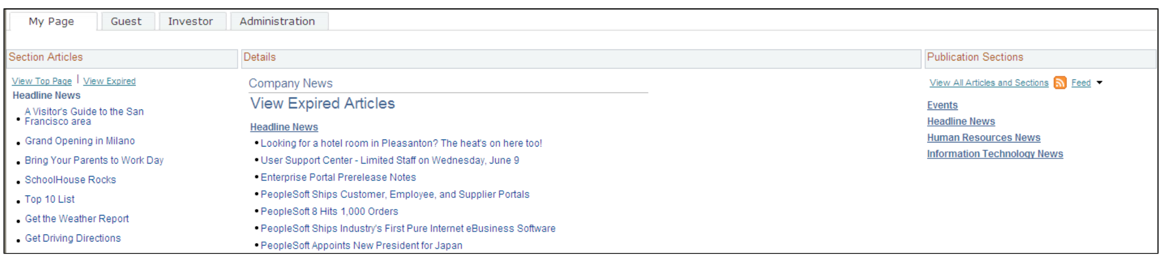
Use the View Expired Articles page (EPPCM_NWDSPARC) to view all expired news publications that have become inactive.

Navigation:

In the Homepage, click any section or article title link in the news publication pagelet—for example, Company News pagelet.

Click the **View Expired** link in the News Publication Details page.

This is the screenshot of View Expired Articles page.



View All Articles and Sections Page

Use the View All Articles and Sections page (EPPCM_NWDSPALL) to view all active articles and sections of the selected news publication pagelet.

Navigation:

- In the Homepage, click **More...** link on the news publication pagelet.
- Click the **View All Article and Sections** link in the news publication Details page listed under Publication Sections column.

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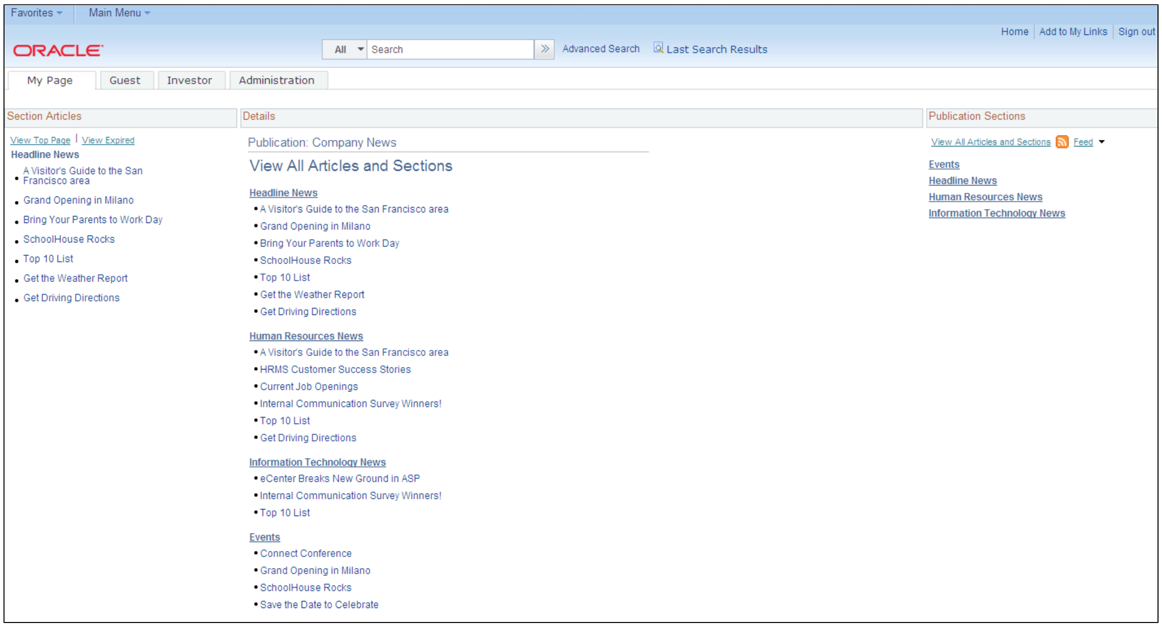
This screenshot shows View All Articles and Sections page.



Submit News Articles - Add News Article Page

Use the Submit News Articles - Add News Article page (EPPCM_ADDCONT_SEC) to select the type of content to add.

Navigation:

- **My Content** > **Submit News Article**
- In the Homepage, click the **Submit Articles** link in the news publication pagelets.

This example illustrates the fields and controls on the Submit News Articles - Add News Article page.

Field or Control	***Description***
Content Type	Select a content type of submitted articles to add to news publications. Available options are: • *File Attachment* • *Text or HTML* • *Web Site URL*

Submit News Articles Page

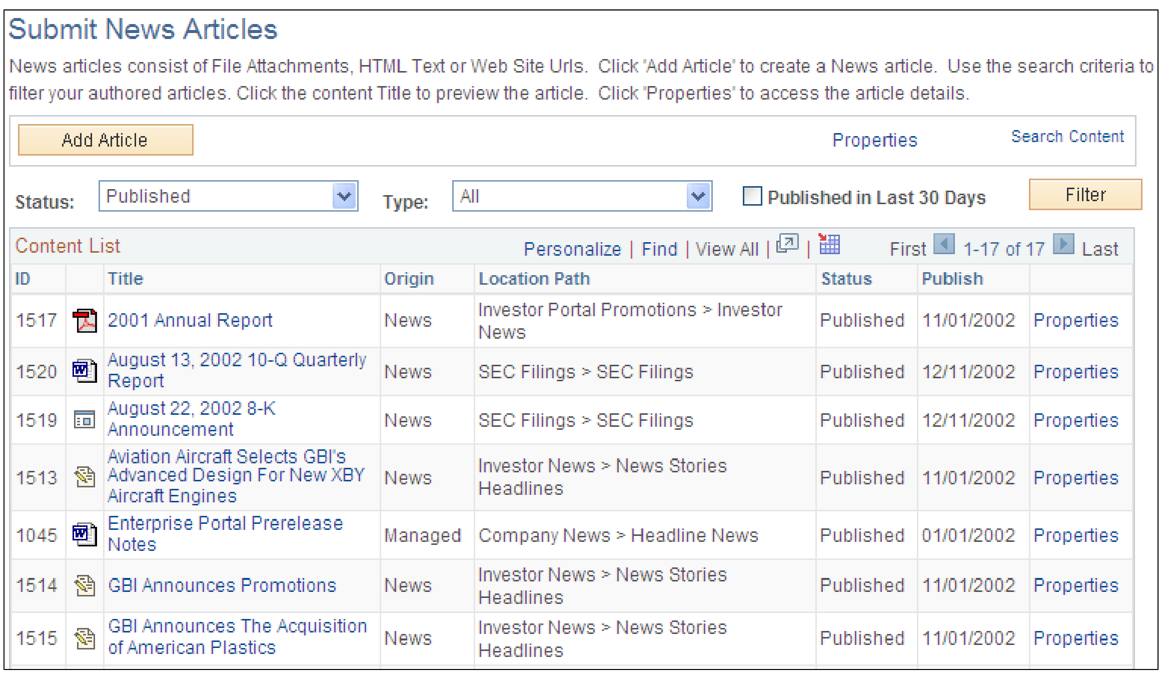
Use the Submit News Articles page (EPPCM_SBMTNW_MAIN) to view basic information about the articles within a section and drill down to article details.

Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles.

Navigation:

- **My Content** > **Submit News Article**
- In the Homepage, click the **Update Submitted Articles** link in the news publication pagelets.

This example illustrates the fields and controls on the Submit News Articles page. You can find definitions for the fields and controls later on this page.



Use this page to view all articles that you have authored, submitted, or updated. From this page you can edit, rework, resubmit, and add articles. You can edit all aspects of unpublished articles and modify summary information of published articles.

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Field or Control	***Description***
Add Article	Select to add a new article to this section.
Filter	Click to limit the number of articles displayed on the page based on the values entered for the following options: • Status: Select to search articles with a status of *Draft, Pending, Published, Rejected, Rework,* or *All.* • Type: Select to search articles with a type of *File, Text/HTML, Web Site,* or *All.* • Published in Last 30 Days: Select to limit your search to articles published within the last 30 days. You can narrow the list by indicating a particular type or status of content and those articles published in the last 30 days.
Origin	Shows where the article originated: • *News* indicates that the article was created from the News Publications feature. • *Managed* indicates that the articles were imported from Managed Content.
Location Path	Displays the path to the article location. **Note:** Articles that are in multiple locations appear multiple times in the list.
Publish	Shows the date that articles are published based on the folder properties for this section.
Status	Displays this article's current publishing status: *Draft, Pending, Publish, Reject,* or *Rework.*
Properties	Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location. See Feature Definitions Page.

Creating Tiles for News Publications

You can publish a news publication as a tile to include it in your Fluid homepage. You can also specify which news articles can display as top stories. Each news publication item can have an associated image. In Fluid mode, display of the image depends on the screen size. PeopleSoft Interaction Hub provides you an option to create a tile of a publication, a section, or an article. You can organize the tiles under folders like PeopleSoft Applications, to segregate different topics.

For more information on creating a tile for Fluid homepage, see the product documentation for *PeopleTools: Fluid User Interface Developer's Guide*, “Configuring Tile Options”.

For more information on adding a tile to Fluid homepage, see the product documentation for *PeopleTools: Applications User's Guide*, “Working With Fluid Homepages”, Managing Fluid Homepages.

Related Links

Understanding News Publications
Choose Top Stories Page

Pages Used to Create Tiles for News Publications

Page Name	***Definition Name***	***Usage***
Publication Properties: Publish as Tile Page	EPPCM_CATG_GPLT	Review, edit or delete a publication item, or a section.
Text or HTML Properties: Publish as Tile Page	EPPCM_CONT_GPLT	Review, edit or delete an article.
Publish Tile Definition Page	EO_PE_GPLT_PUB	Rename the tile and move the tile to a different folder.

Publication Properties: Publish as Tile Page

Use the Publication Properties: Publish as Tile page (EPPCM_CATG_GPLT) to review, edit or delete a Publication tile. Use the Section Properties: Publish as Tile Page to review, edit or delete a Section tile.

Navigation:

Content Management > **News Publication** > **Browse Publications**

Click the Properties link of a publication for which you want to create a tile. The Folder Properties page for the publication appears. Click Publish as Tile link to display the Publication Properties: Publish as Tile Page.

If you want to make tile of a publication section then click the Title link of a publication folder on the Browse News Publications page to display the Browse Publication Sections page. Click Properties link of the section of which you want to create the tile, Folder Properties page of the section appears. Click Publish as Tile link to display the Section Properties: Publish as Tile Page.

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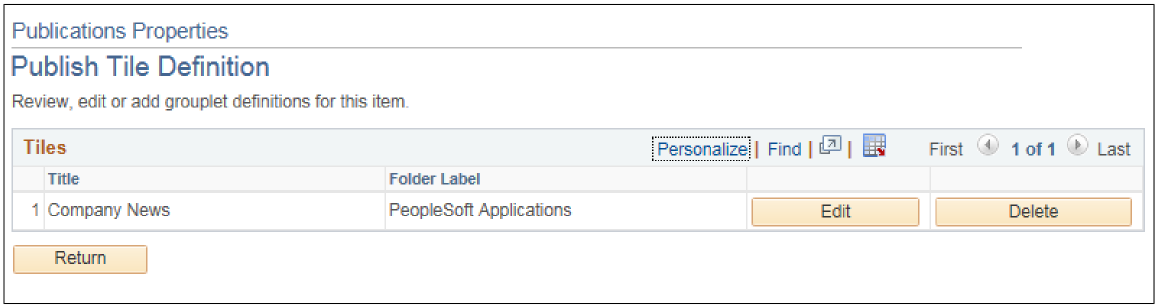
This example illustrates Publications Properties: Publish as Tile page where a list of publication folders published as tiles are displayed.



Field or Control	***Description***
Title	Displays the title of the news publications folder or section that is published as a tile.
Folder Label	Displays the folder the tile is saved in.
Personalize	Click to open the Tiles: Personalize Column and Sort Order secondary page where you can change order of columns and select to hide or freeze columns. For more information on personalizing the grid, see *PeopleTools: Portal TechnologyPeopleTools: Portal Technology*, “Personalizing Grids”. For description on Grid Personalization, see *PeopleTools: Applications User's Guide*, “Navigating Through Data”.
Edit	Click to edit the tile title name and the folder label information.
Delete	Click to delete the item as a tile.

Text or HTML Properties: Publish as Tile Page

Use the Text or HTML Properties: Publish as Tile page (EPPCM_CONT_GPLT) to review, edit or delete the tile. You can select a content type from the options, file attachment, managed content, text or HTML, or web site URL to create a new article. Then select any article from Browse Section Articles page to publish it as a tile.

Navigation:

Content Management > **News Publication** > **Browse Publications**

Click the **Title** link of a publication folder to display the Browse Publication Sections page. Click the **Title** link of a publication section folder to display Browse Section Articles page. Click **Properties** link of the article that you want to publish as a tile to display the properties page. If the article is not published then click **Publish** button to display the **Publish as Tile** link. The link exists on the properties page of a published article.

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See Publication Properties: Publish as Tile Page for more information on the fields and controls on the page.

Publish Tile Definition Page

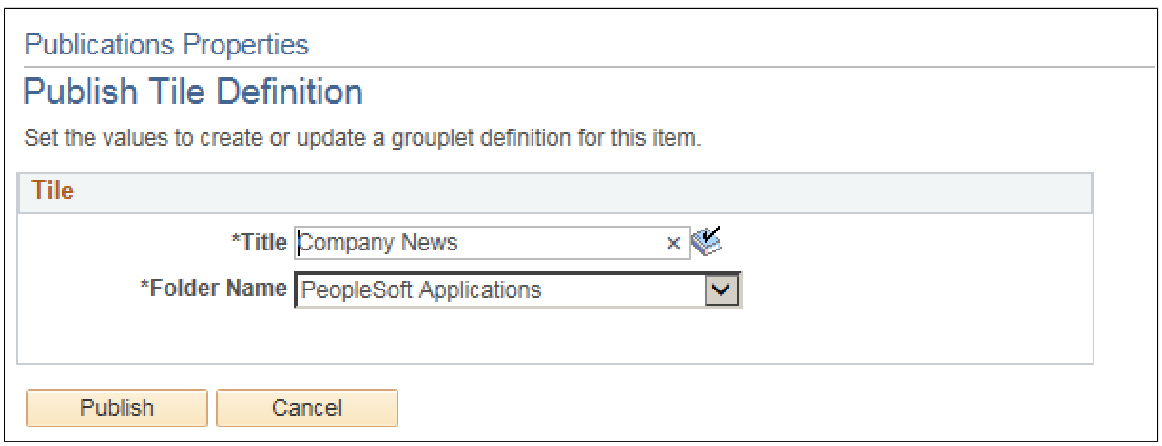
The Publish Tile Definition page (EO_PE_GPLT_PUB) appears, if you are publishing a news publication for the first time as a tile. Use the Publish Tile Definition page to change the Tile Title and move the tile to a different folder before publishing it.

Navigation:

Content Management > **News Publication** > **Browse Publications**.

Click the Properties link to open the Publication Properties: Publish as Tile page. Click the Edit button to display the Publish Tile Definition page.

The example illustrates Publish Tile Definition page where you can change the title of the tile and select a folder where it is published.



Field or Control	***Description***
Title	Enter the tile title. You can change the title to be different from its original publication name.
Folder Name	Select the folder to save the tile in it.
Publish	Click to publish the tile.

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Chapter 8

Using the Advanced Options

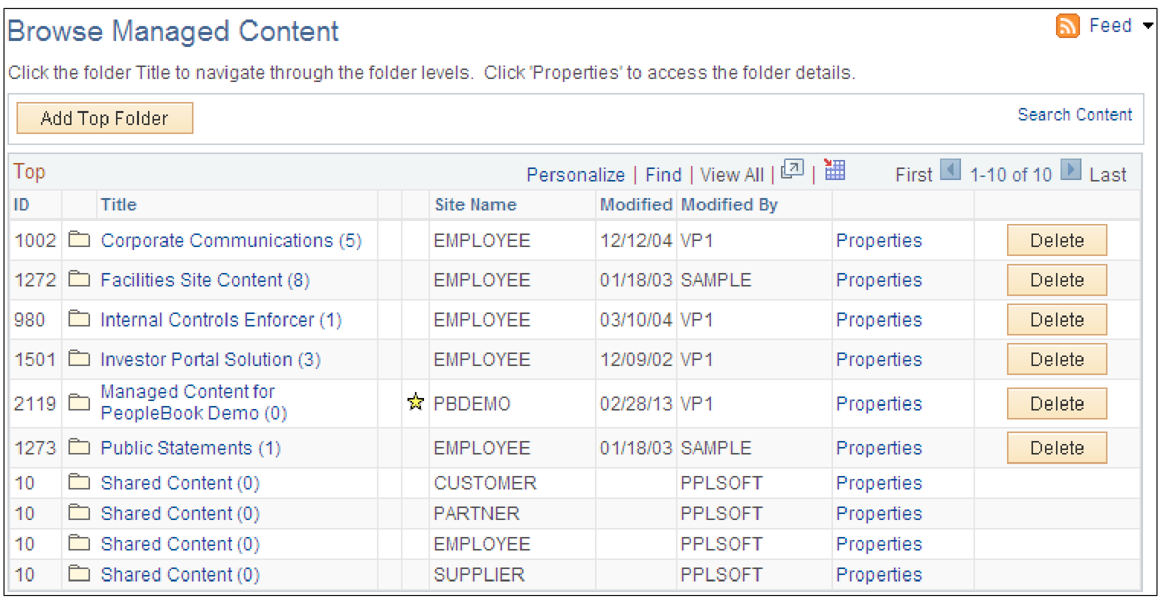
Browsing All Folders

This section discusses how to browse all folders.

Browsing All Folders

Access the Browse feature (select **Content Management** > **Advanced Options** > **Browse All Folders).**

This screenshot is an example of a page in the Browse feature.



The **Browse All Folders** option enables you to drill down through the top level folders to locate and view content that is in one of these features (EPPCM_HIERTOP_MAIN and EPPCM_HIER_MAIN):

- Browse Workspace Content
- Browse Discussion Content
- Browse Navigation Content
- Browse Menu Items
- Browse Pagelet Wizard Content
- Browse Related Content

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Note: The **Browse All Folders** option is the only browse option by which you can locate and access content across all portal sites without having to log into that site.

Related Links

PeopleSoft Interaction Hub Content Management System Features

Understanding the Folder Hierarchy

Searching All Folders

This section discusses how to search all folders.

Search Folders Page

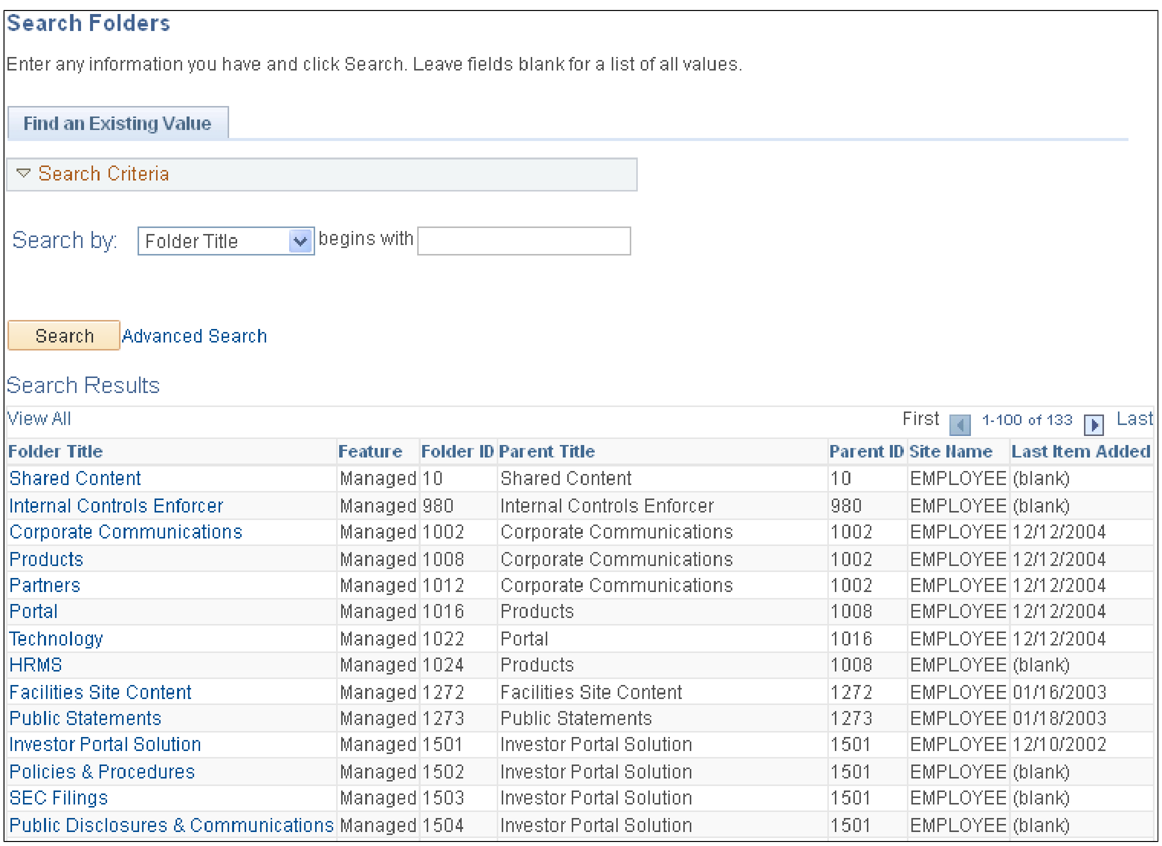
Use the Search Folders page (EPPCM_HIERARCHY) to used to locate a folder in the content management system.

This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.

Navigation:

Content Management, Managed Content, Search Folders

This example illustrates the fields and controls on the Search Folders page.



Folder Title	Feature	Folder ID	Parent Title	Parent ID	Site Name	Last Item Added
Shared Content	Managed	10	Shared Content	10	EMPLOYEE	(blank)
Internal Controls Enforcer	Managed	980	Internal Controls Enforcer	980	EMPLOYEE	(blank)
Corporate Communications	Managed	1002	Corporate Communications	1002	EMPLOYEE	12/12/2004
Products	Managed	1008	Corporate Communications	1002	EMPLOYEE	12/12/2004
Partners	Managed	1012	Corporate Communications	1002	EMPLOYEE	12/12/2004
Portal	Managed	1016	Products	1008	EMPLOYEE	12/12/2004
Technology	Managed	1022	Portal	1016	EMPLOYEE	12/12/2004
HRMS	Managed	1024	Products	1008	EMPLOYEE	(blank)
Facilities Site Content	Managed	1272	Facilities Site Content	1272	EMPLOYEE	01/16/2003
Public Statements	Managed	1273	Public Statements	1273	EMPLOYEE	01/18/2003
Investor Portal Solution	Managed	1501	Investor Portal Solution	1501	EMPLOYEE	12/10/2002
Policies & Procedures	Managed	1502	Investor Portal Solution	1501	EMPLOYEE	(blank)
SEC Filings	Managed	1503	Investor Portal Solution	1501	EMPLOYEE	(blank)
Public Disclosures & Communications	Managed	1504	Investor Portal Solution	1501	EMPLOYEE	(blank)

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The **Search All Folders** option enables you to locate a folder in the Content Management system in any site, and access the children associated with the selected folder.

You can search by *Feature, Folder ID, Folder Title, Last Item Added, Parent ID,* or *Site Name.*

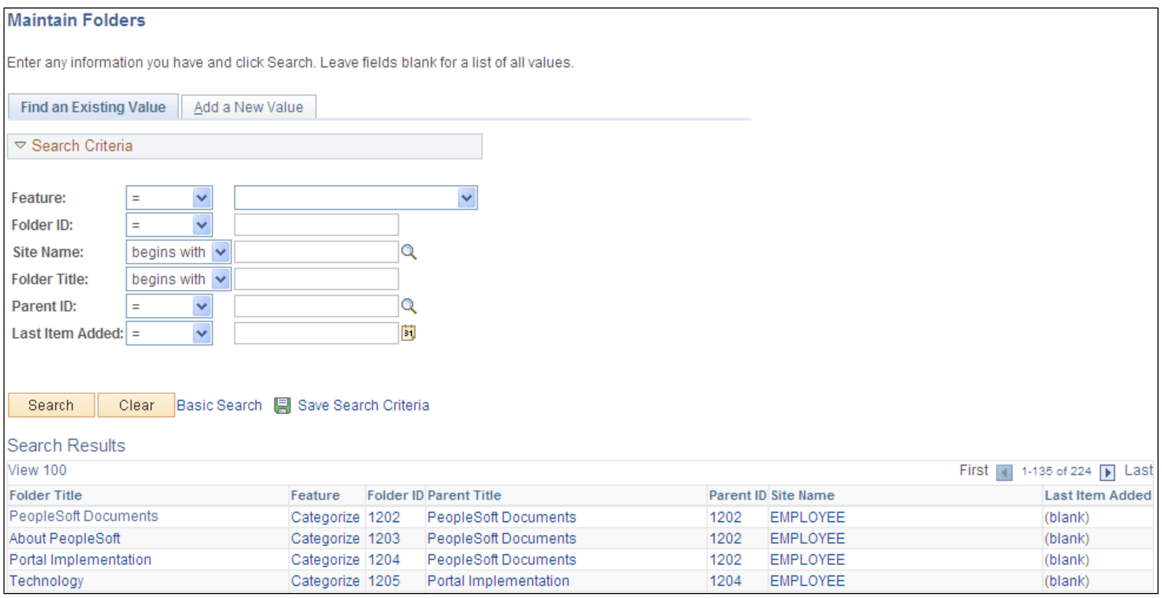
Maintaining All Folders

This section discusses how to use the Maintain All Folders option.

Maintain Folders Page

Access the Maintain Folders page (EPPCM_DEFN_CATG) (select **Content Management** > **Advanced Options** > **Maintain All Folders).**

This is the screenshot of Maintain Folders page.



The **Maintain All Folders** option enables you to locate a folder that is stored in the Content Management system in any site and access the children associated with the selected folder.

Use the Maintain Folders search page to find the desired folder. You can search by *Feature, Folder ID, Folder Title, Last Item Added, Parent ID,* or *Site Name.* Click the folder title to access the Content Properties page, where you can edit or view the property details based on your security access.

Related Links

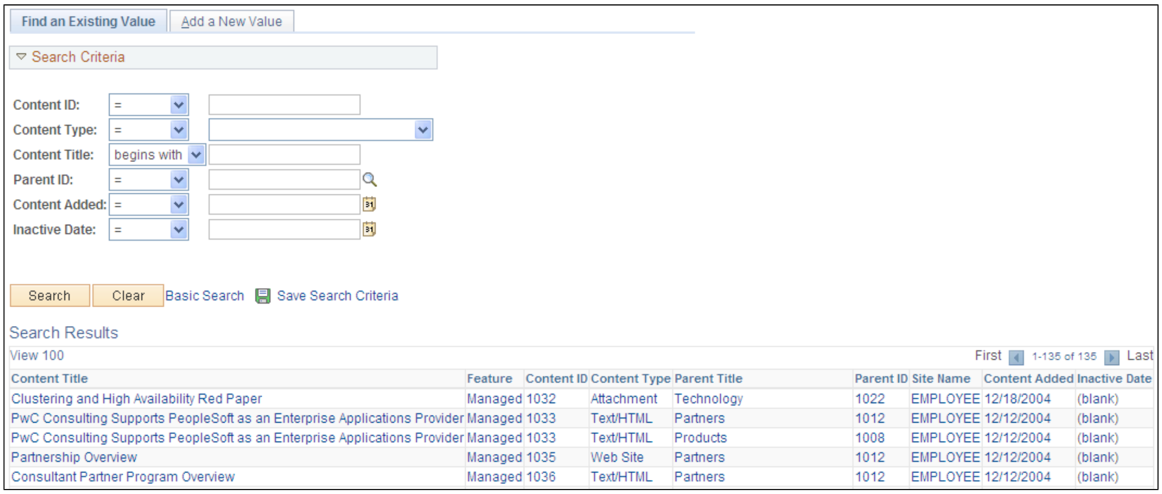
Managing Folders
Setting Up News Publications

Maintaining All Content

This section discusses how to use the Maintain All Content option.

Access the Maintain Content page (EPPCM_DEFN_CONT) (select **Content Management** > **Advanced Options** > **Maintain All Content).**

This is the screenshot of Maintain Content page.



The **Maintain Content** option enables you to locate and maintain the properties for the content stored in the Content Management system in any site.

Use the Maintain Content search page to find the desired content item. You can search by *Archive Date, Content Added, Content ID, Content Title, Content Type, Feature, Parent ID,* or *Site Name.*

Click the content title to access the Content Properties page, where you can edit or view the property details based on your security access.

Related Links

Managing Versions
Adding Categorized Content Manually
Managing News Articles

Unlocking Content

This section provides an overview of the unlocking process and discusses how to unlock managed content.

Understanding the Unlocking Process

Users with authorization to release locks on content under their folders can do so from the Unlock Managed Content page. This action is different from canceling your own checkout while editing content. Unlocking enables you to release content locked by another user and return the content for editing. It does not perform a check-in action or discard the most recent content version.

Note: Canceling the checkout from the Content Properties page may delete the most recent version and release the editing lock at the same time. A version can be deleted only if it is in draft status and more than one version exists.

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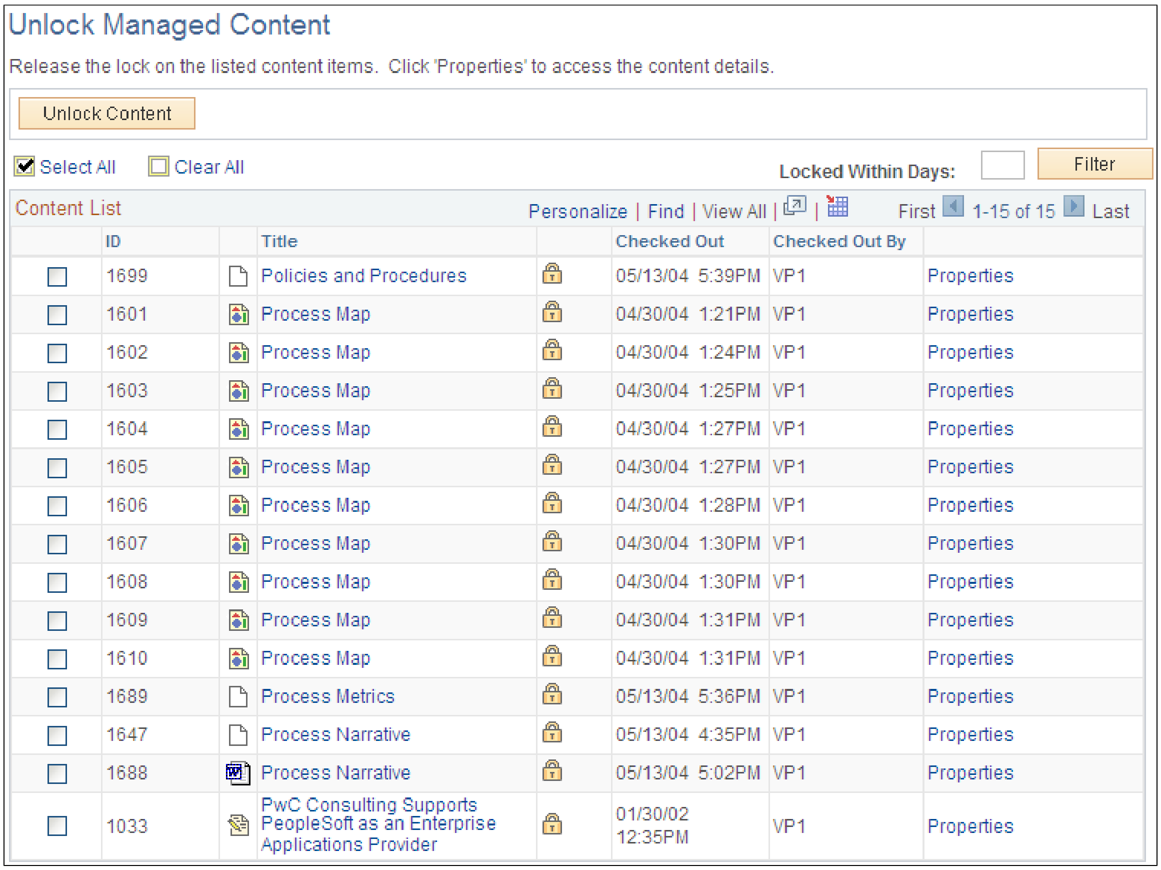
Unlock Managed Content Page

Access the Unlock Managed Content page (EPPCM_LOCK_MAIN) (select **Content Management** > **Advanced Options** > **Unlock Content;** select the *Managed Content* feature on the Unlock Content search page).

This example illustrates the fields and controls on the Unlock Managed Content page. You can find definitions for the fields and controls later on this page.



Alternatively, access the Unlock Documents page (select **Content Management** > **Advanced Options** > **Unlock Content;** select the *Collaborative Workspace* feature on the Unlock Content search page.

Use the Unlock Managed Content page and the Unlock Documents page to release the lock on the listed content items and view content property details.

Field or Control	***Description***
Unlock Content	Select individual items or select the **Select All** option to select all items, and then click the **Unlock Content** button to release the lock on selected items. **Note:** When an item has been unlocked, it is automatically removed from the list.

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Field or Control	*Description*
Locked Within Days	Enter a number and then click the **Filter** button to limit the number of items listed to content items that were locked up to that number of days ago.
Title	Click to view the content in the same format as it is seen by viewers.
Properties	Click to view the property details of the content.

Related Links

Understanding Managed Content

Reviewing Content Details

This section provides an overview of the Review Content option and discusses how to review content details.

Understanding the Review Content Option

The Review Content page shows all content and all states and provides users with the following information based on their viewing rights:

- All locations where the content is published.

  Users can navigate to only the folders that they have security privileges to access.

- All members of the qualified viewing community, along with their access types.
- Access to a preview of the content for qualified viewers.

  The **Preview Content** link is hidden from users who do not have the correct security access.

- Access to the property details of the content if the user has viewer privilege.

  The **Content Properties** link is hidden from users who do not have the correct security access.

Note: Access authorization to the Review Content page is delivered by the PAPP2070 permission list.

Unlike other pages accessible from the Content Management menu, the Review Content page does not use the row-level security enforced by folder membership and privileges. If a user's permission list has access to this page, he or she can review a content title, where the content item is located, and who has access. However, that user cannot view the actual content if he or she has not been assigned the correct security privileges.

Related Links

Understanding Managed Content

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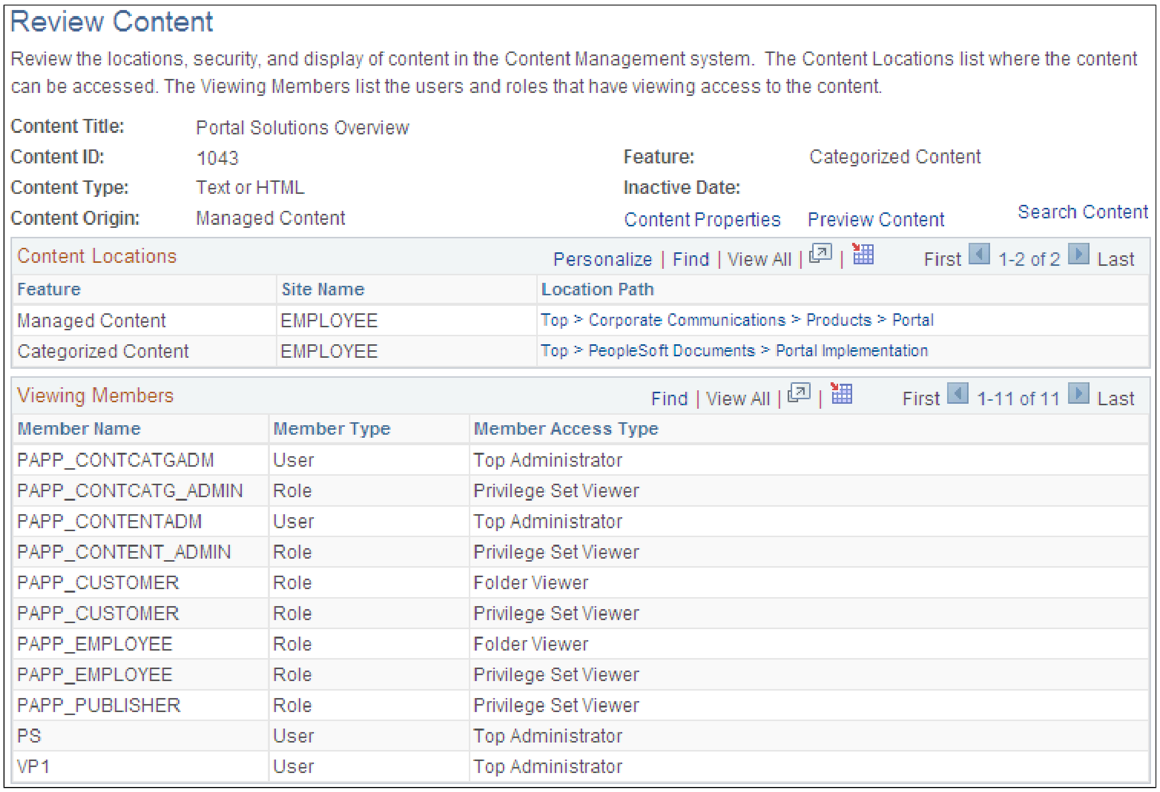
Understanding Categorized Content
Understanding News Publications

Review Content Page

Access the Review Content page (EPPCM_INQ_MAIN) (select **Content Management** > **Advanced Options** > **Review Content**).

This example illustrates the fields and controls on the Review Content page: Categorized Content. You can find definitions for the fields and controls later on this page.



This page provides an easy way to review the different locations and security that are assigned to any content located in Content Management, view content properties, and preview the content in the same format as seen by viewers.

Field or Control	***Description***
Content Type	Displays the type of content. Possible types are *File Attachment, Image Attachment, Image URL, Image Upload JPG, Managed Content, Menu Item, Text or HTML,* and *Web Site URL.*
Content Origin	Displays the location where the content first originated. Origins are *Managed Content, Categorized Content, News Publications,* and *Workspaces.*

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Content Locations

Field or Control	***Description***
Feature	Indicates the features to which the content is currently accessible: *Categorized Content, Collaborative Workspace, Discussion Forum, Manage Navigation, Managed Content, Menu Items, News Publications, Pagelet Wizard,* or *Related Information.* This field also clarifies the location to which the **Location Path** value applies.
Location Path	Indicates the hierarchical paths and locations to which the selected content is accessible. If you have access to the folders, location paths appear as links; you can click those links to access the appropriate Browse Content page. If you do not have access permission, the location paths appear as basic text. See Understanding the Folder Hierarchy.
Preview Content	Click to view the content in the same format as it is seen by the viewers.
Content Properties	Click to view the property details of the content.

Viewing Members

Field or Control	***Description***
Member Type	Indicates the type of member that has viewer access to the selected content. Values are *Role* and *User.*
Member Name	Depending on the **Member Type** value, displays the role name or user ID that has viewer access to the selected content.

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Field or Control	*Description*
Member Access Type	Displays the type of viewer access that the member has for the selected content: • *Top Administrator* indicates that the member is a top folder administrator. • *Privilege Set Viewer* indicates that the member has viewing privileges to the content's parent folder. • *Content Viewer* indicates the viewer role associated with the content item (for news publications). • *Folder Viewer* indicates the viewer role associated with the parent folder of the content.

Rendering Content URLs

This topic discusses generating URLs for third party access and previewing content.

Pages Used to Render Content URLs

Page Name	*Definition Name*	*Usage*
Render Content URL Page	EPPCM_RNDR_MAIN	Generate URLs for third-party access.
Preview Content Page	EPPCM_PUB_VIEWURL EPPCM_PUB_VIEWHTML EPPCM_PUB_VIEWFILE	Review content in the format in which it will be seen by viewers.

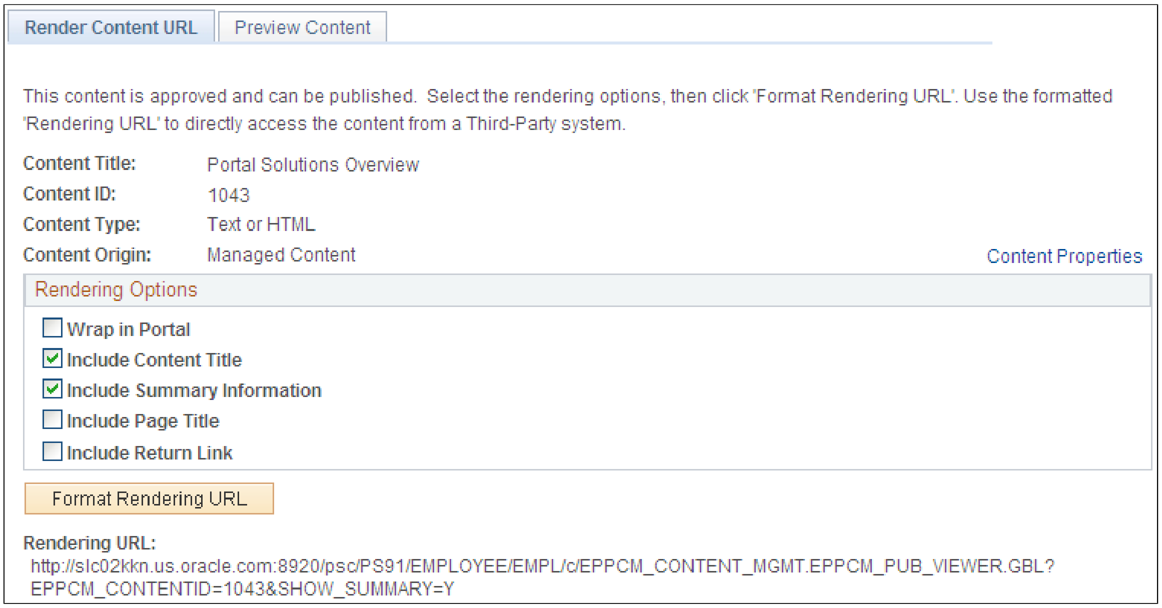
Render Content URL Page

Use the Render Content URL page (EPPCM_RNDR_MAIN) to generate URLs for third-party access.

Navigation:

Content Management > **Advanced Options** > **Render Content URL**

This is the screenshot of Render Content URL page.



Field or Control	***Description***
Format Rendering URL	Click to generate a URL to rendered content in the **Rendering URL** field. **Important!** If you change your rendering option selections, you must click this button to reconstruct a proper URL.
Rendering URL	Contains the URL generated to access content rendered using the options selected on this page. **Note:** This URL is not stored. This URL provides direct viewer access to rendered content for qualified viewers from any location within or outside your PeopleSoft Interaction hub who also have appropriate viewer access to the rendered content. Users who want to access this URL from outside the PeopleSoft Interaction hub must be able to log in to the portal, unless single login is implemented. If this URL is published and accessed from within the same PeopleSoft Interaction hub in which the content is located, no login is necessary because the user accessing the URL will already be logged in.

Rendering Options

Use the options in the **Rendering Options** section to set rendering options for the selected content. You can view the results of your selection on the Preview Content Inquiry page, or by accessing the rendering URL generated on this page.

If you do not select any rendering options, only text or HTML content is rendered. If the content is a document attachment or website URL, only a link to the attachment or website is rendered.

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Note: If both **Wrap in Portal** and **Include Return Link** options are selected on the Render Content URL page, you must ensure that the return URL value include */psc/* and not */psp/* if you intend to return to a PeopleSoft URL. If you leave the */psp/* in the URL, a double header will be rendered when the user clicks the **Return** link.

Field or Control	***Description***
Wrap in Portal	Select to display the content wrapped in the portal template header.
Include Content Title	Select to include the content title in the rendered content.
Include Summary Information	Select to include the content summary information in the rendered content. This selection includes a summary of the content, as well as the content source and last modified date and time, and any associated image.
Include Page Title	Select to include a page title for the content. When you select this option, the **Default Page Title** and **Override Page Title** fields appear.
Default Page Title and **Override Page Title**	A default page title of *View Content* appears; however, you can override this value by entering a title in the **Override Page Title** field.
Include Return Link	Select to include an explicit return link on the content display page, enabling your viewer to navigate back to an appropriate location. When you select this option, the **Default Return Label, Override Return Label,** and **Return to URL Value** fields appear.
Default Return Label	A default return label of *Return* appears; however, you can override this value by entering a return label in the **Override Return Label** field.
Return to URL Value	Enter the URL to an explicit location to which you want to return your users from the content display page.

Preview Content Page

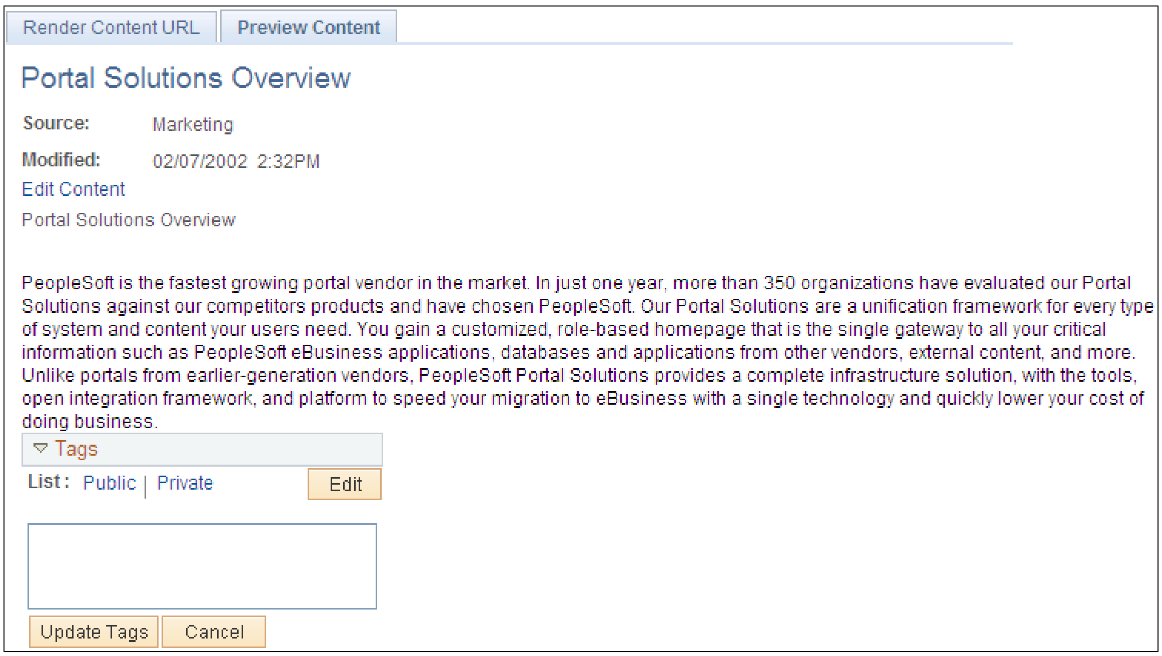
Use the Preview Content page (EPPCM_PUB_VIEWURL) to review content in the format in which it will be seen by viewers.

Navigation:

Content Management > **Advanced Options** > **Render Content URL**

Select the Preview Content tab on the Render Content URL page.

This example illustrates the fields and controls on the Preview Content page. You can find definitions for the fields and controls later on this page.



Use this page to review content in the format in which it will be seen by viewers.

Field or Control	***Description***
Edit Content	Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location. See <u>Defining Features</u>.

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Chapter 9

Working with Content WorkCenter

Understanding Content WorkCenter

In Oracle's PeopleSoft Interaction hub, the Content WorkCenter feature of the Content Management system provides a central location for content administrators to:

- Manage the development of content.

  For more information about editing and reviewing the Managed Content, see Working with Managed Content

- Manage news publication.

  For more information about editing and reviewing the News content, see Working with News Publications

Related Links

Understanding Managed Content
Understanding News Publications

Working with Managed Content

In Content WorkCenter, you can:

- Create content.
- Manage content collaboratively in folders.
- Check content in and out.
- Create new versions of content.
- Make approved content available to other content management features, such as news publications, content categorization, collaborative workspaces, related information pagelets,

Pages Used to Manage Content

Page Name	***Definition Name***	***Usage***
Browse Managed Content Page	EPPCM_HIERTOP_MAIN	Use to add a top level folder.

Page Name	***Definition Name***	***Usage***
Publish as Menu Item Page	EPPCM_REG_CONT	Use to publish a content as a menu item.
Publish as Pagelet Page	EPPPB_PGLT_PUB	Use to publish a content as a pagelet.
My Managed Content Status Page	EPPCM_USER_MAIN	Use to review the work that requires attention.

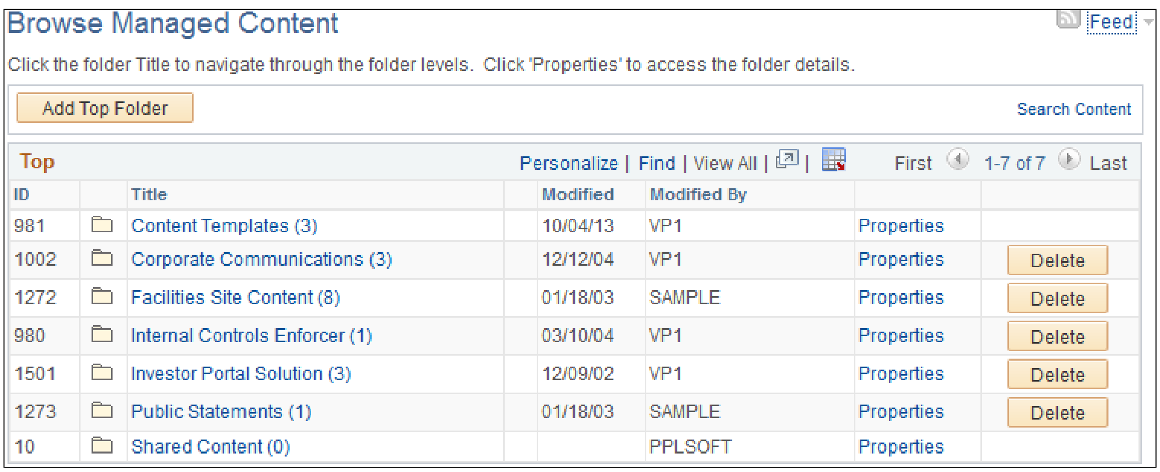
Browse Managed Content Page

Use the **Browse Managed Content** page (EPPCM_HIERTOP_MAIN) to add a top-level folder if you are a top administrator for this feature or, starting at the top level folders, drill down through folder hierarchies for content that is accessible by that feature.

Navigation:

Content Management > **Content WorkCenter** > **Browse and Add Content**

This example illustrates the fields and controls on the Browse Managed Content page.



Related Links

Browse Managed Content Page

Publish as Menu Item Page

Use the **Publish as Menu Item** page (EPPCM_REG_CONT) to publish a content in the content management system so that it is accessible as a link in the left navigation menu.

Navigation:

Content Management > **Content WorkCenter** > **Publish as Menu Item**

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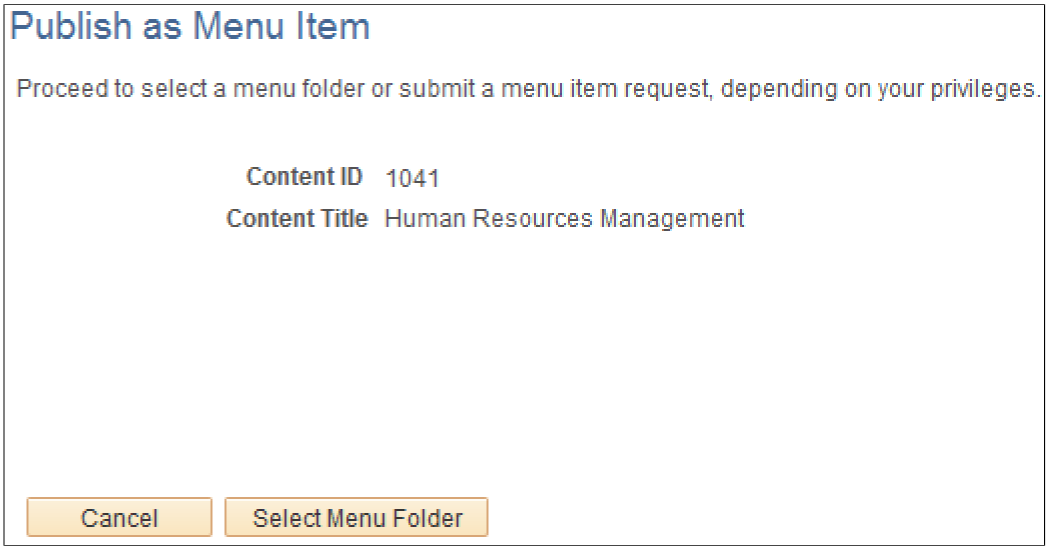
This example illustrates the fields and controls on the Publish as Menu Item page.



Field or Control	***Description***
Select Menu Folder	Click this to access the **Manage Navigation** page to select the menu folder. For more information about selecting a menu folder, see “Manage Navigation Page” (Portal and Site Administration).

Related Links

“Manage Navigation Page” (Portal and Site Administration)
Folder Properties - Publish as Menu Item Page

Publish as Pagelet Page

Use the Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to publish a content in the Content Management system as a pagelet.

Navigation:

Content Management > **Content WorkCenter** > **Publish as Pagelet**

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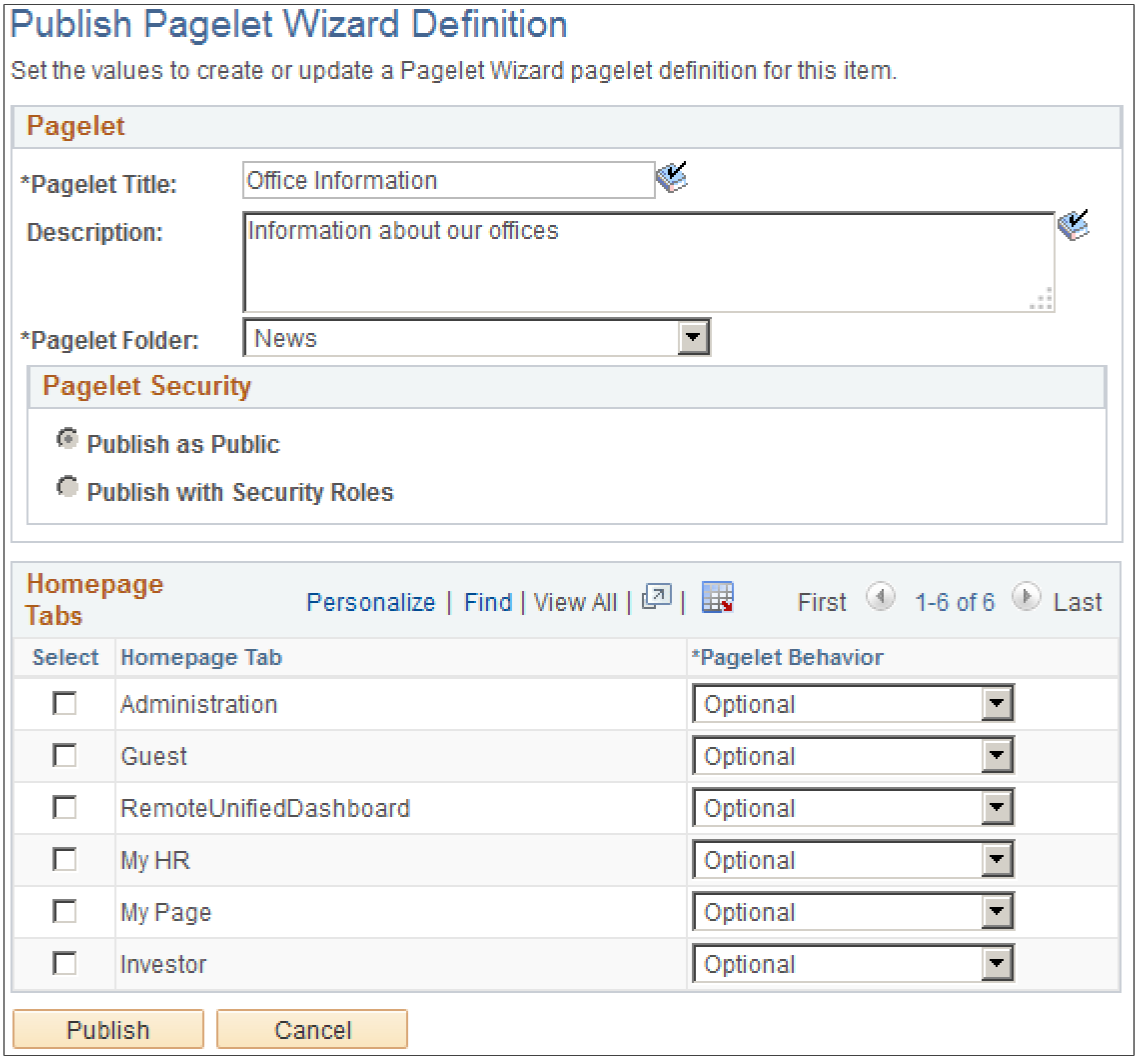
This example illustrates the fields and controls on the Publish Pagelet Wizard Definition page.



Field or Control	***Description***
Pagelet Title	Enter the pagelet title that will identify the pagelet.
Description	Enter a meaningful description for this pagelet.
Pagelet Folder	Select a folder to publish to. Only folders from the current site are available to select.

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<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Pagelet Security</td><td>Select the security options for viewing the pagelet. The available options are:

• Publish as Public, which enables all users to view the pagelet.

Note: When publishing a content item as a pagelet, this is the only available option and it is selected by default.

• Publish with Security Roles, which uses the roles defined on the Folder Security page when publishing the pagelet.

Note: If no roles are defined on the Folder Security page, the system automatically selects to publish the pagelet as Public.</td></tr>
<tr><td>Homepage Tab</td><td>Select the tabs that will display the pagelet.</td></tr>
<tr><td>Pagelet Behavior</td><td>Select the behavior options for the pagelet. The available options are:

• Optional

The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.

• Optional-Default

The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.

• Required-Fixed

The pagelet will appear on all user homepages if users have access to the pagelet. The placement of the pagelet cannot be changed, and the pagelet cannot be removed from the homepage.

• Required

The pagelet will appear on all user homepages if the user has access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.</td></tr>
<tr><td>Publish</td><td>Click to display the Publish as Pagelet page, where you can review or edit the pagelet definition.</td></tr>
</table>

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Related Links

Folder Properties - Publish Pagelet Wizard Definition Page

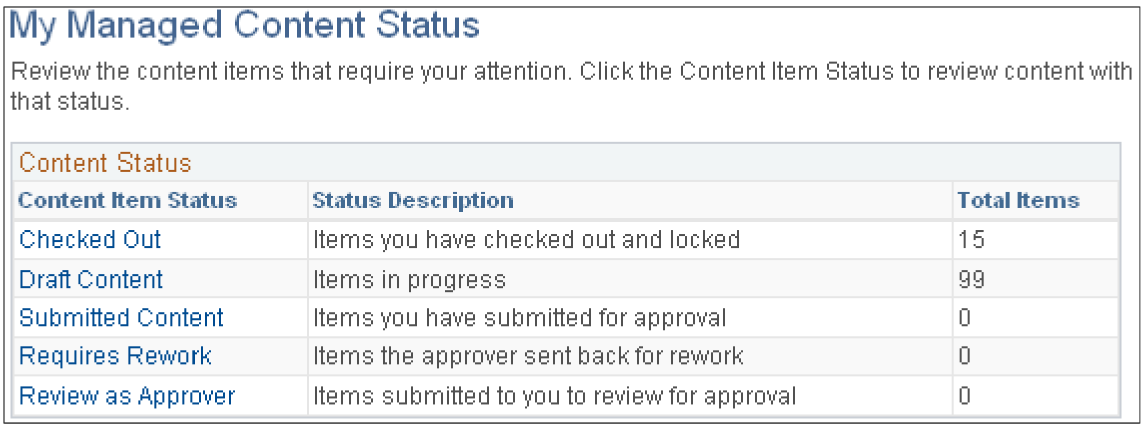
My Managed Content Status Page

Use the **My Managed Content Status** page (EPPCM_STAT_MAIN) to view the work that you need to perform based on the status of managed content.

Navigation:

Content Management > **Content WorkCenter** > **My Managed Content**

This example illustrates the fields and controls on the My Managed Content Status page.



Field or Control	***Description***
Content Item Status	Click an appropriate link to access the My Managed Content page, where you can preview the content items for the selected status, view their property details, or add new content.

Related Links

My Managed Content – Checked Out Page

Working with News Publications

In Content WorkCenter, you can, edit, view, publish, and withdraw news articles. It also provides information on working with the My News Content pagelet and choosing top stories.

Pages Used to Administer and Manage News Publications

Page Name	***Definition Name***	***Usage***
Browse News Publications Page	EPPCM_HIERTOP_MAIN	Set up and administer news publication.

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Page Name	*Definition Name*	*Usage*
Publish News Articles Page	EPPCM_PBLNW_MAIN	Choose articles for publish, update, or reject.
Choose Top Stories Page	EPPCM_CTSNW_MAIN	Select articles for prominent display.
Unpublish News Articles Page	EPPCM_UPBLNW_MAIN	Unpublish articles.
Administer News Content Page	EPPCM_ADMN_MAIN	Administer news content.
My News Content Status Page	EPPCM_STAT_MAIN	Manage news articles.

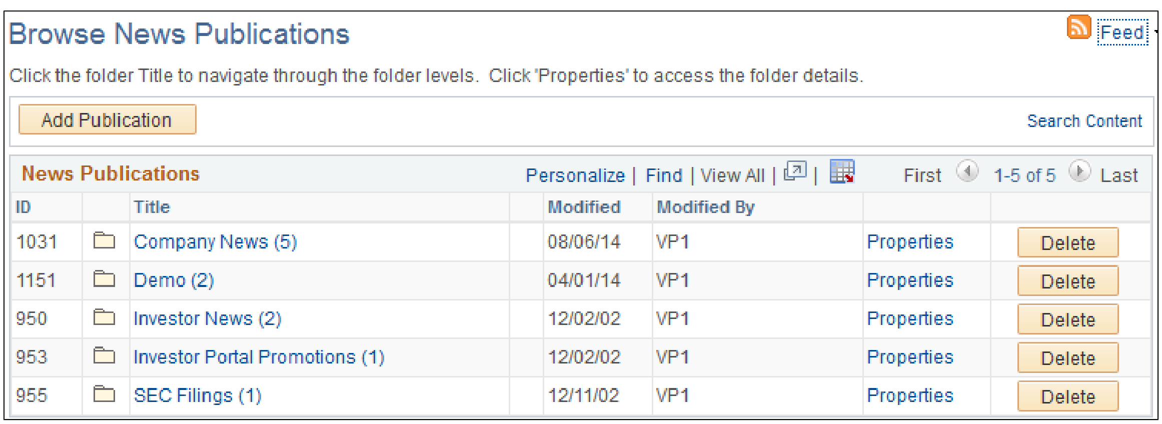
Browse News Publications Page

Use the Browse News Publications page (EPPCM_HIERTOP_MAIN) to set up and administer news publication.

Navigation:

Content Management > **Content WorkCenter** > **Browse and Add Article**

This example illustrates the fields and controls on the Browse News Publications page.



Field or Control	*Description*
Add Publication	Click this to create news publications and to add folder security. For more information, see Setting Up News Publications
Title	Enter the name of the pagelet as it will appear in the pagelet header.

Field or Control	***Description***
Propertities	Click this to: • Set the properties for a new folder or update property details for an existing folder. For information about setting folder properties, see Folder Properties Page. • Manage the folder members and their privileges. For information about setting folder security, see Folder Security Page • Define users and roles and specify their access privileges. For information about setting access privileges, see Folder Security - Set Members Privileges Page
Delete	Click this to delete a folder.

Related Links

Setting Up News Publications

Publish News Articles Page

Use the **Publish News Articles** page (EPPCM_PBLNW_MAIN) to select articles for publishing, rework, or rejection.

Navigation:

Content Management > **Content WorkCenter** > **Publish Articles**

This example illustrates the fields and controls on the Publish News Articles page.

Field or Control	***Description***

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Related Links

Publish News Articles Page

Choose Top Stories Page

Use the **Choose Top Stories** page (EPPCM_CTSNW_MAIN) to select the articles that you would like to display prominently.

Navigation:

Content Management > **Content WorkCenter** > **Choose Top Stories**

This example illustrates the fields and controls on the Choose Top Stories page.

Field or Control	*Description*

Related Links

Choose Top Stories Page

Unpublish News Articles Page

Use the **Unpublish News Articles** page (EPPCM_UPBLNW_MAIN) to unpublish articles.

Navigation:

Content Management > **Content WorkCenter** > **Unpublish Articles**

This example illustrates the fields and controls on the Unpublish News Article page.

Field or Control	***Description***

Related Links

Unpublish News Articles Page

Administer News Content Page

Use the **Administer News Content** page (EPPCM_ADMN_MAIN) to bypass the privilege set security to:

- Add articles.
- Preview content
- View content property details
- Remove content
- Unpublish content from all news publications.

Navigation:

Content Management > **Content WorkCenter** > **Administer Content**

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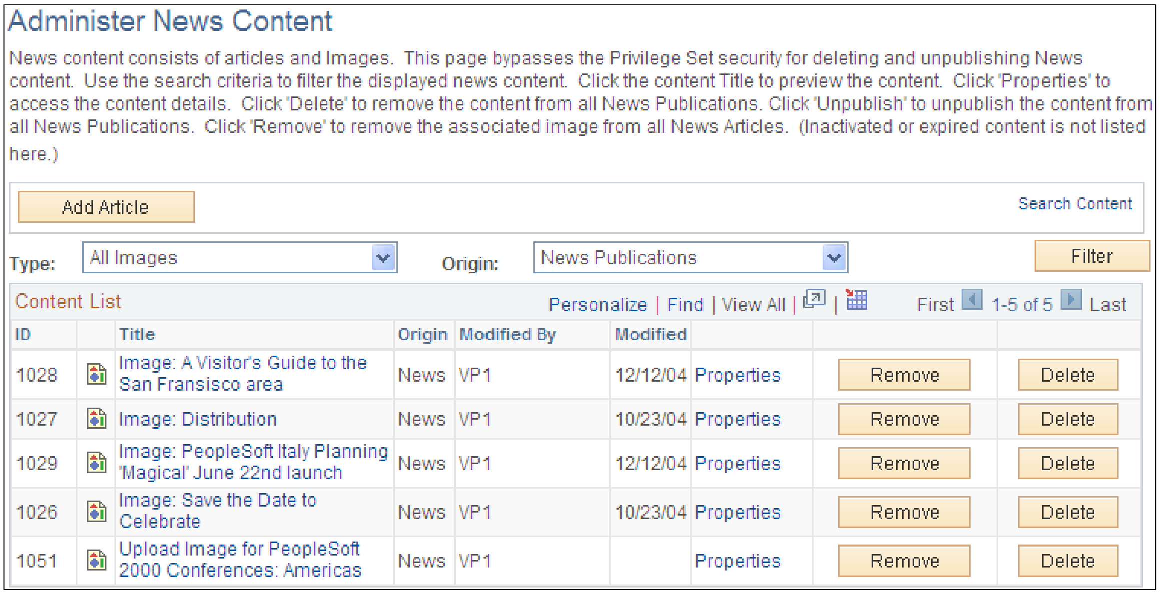
This example illustrates the fields and controls on the Administer News Content page.



Field or Control	***Description***

Related Links

Administering News Content

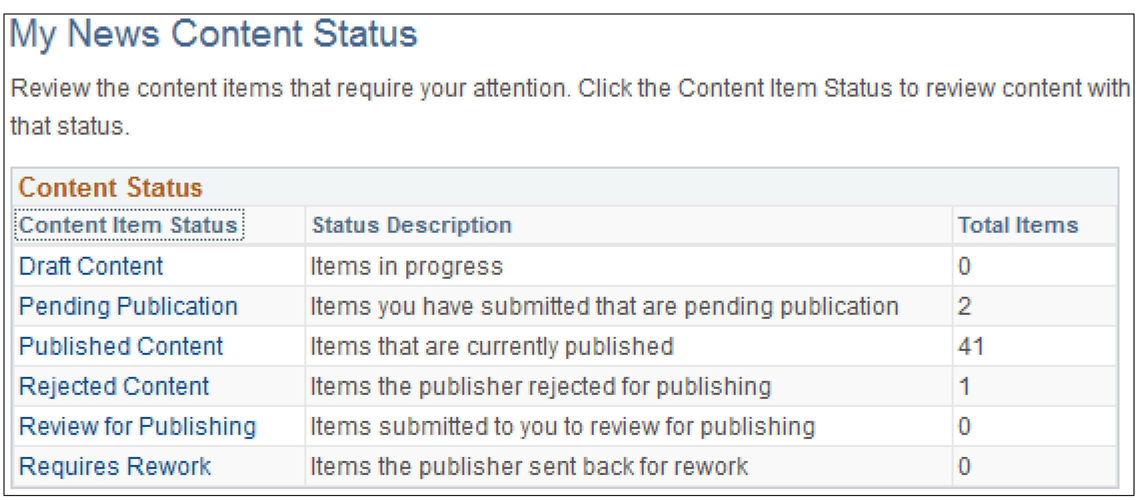
My News Content Status Page

Use the **My News Content Status** page (EPPCM_STAT_MAIN) to manage news articles.

Navigation:

Content Management > **Content WorkCenter** > **My News Content**

This example illustrates the fields and controls on the My News Content Status Page page.



Click the **Content Item Status** link to toggle the content item status display list.

To edit or update news article, click a status link to access the **My News Content** page.

Related Links

My News Content Status Page

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Chapter 10

Setting Up and Managing Company Promotions

Understanding Company Promotions

Company promotions enable you to highlight special products, promotions, or transactions for your portal users by displaying them prominently on their home page. The Company Promotions feature can add this type of content to any portal product so that users can link to specific transactions or URLs in your system. Users can personalize their views of company promotions by selecting categories, displaying number of rows, and selecting a narrow or wide version of the pagelet.

Setting Up Company Promotions

This topic discusses how to define targets, categories and content to set up company promotions.

Pages Used to Set Up Company Promotions

Page Name	***Definition Name***	***Usage***
Define Company Promotion Targets Page	EO_PE_PR_TARGET	Make portal registry content references available as promotion target pages.
Company Promotion Categories Page	EO_PE_PR_CAT_TBL	Define company promotions categories.
Company Promotion Page	EO_PE_PR_SETUP	Define pagelet content for your promotions. End users who submit promotions should access the page through Portal Administration. Managers who edit or add promotions should access the page through My Content.

Define Company Promotion Targets Page

Use the Define Company Promotion Targets page (EO_PE_PR_TARGET) to make portal registry content references available as promotion target pages.

Navigation:

Portal Administration > **Pagelets** > **Promotions** > **Promotion Targets**

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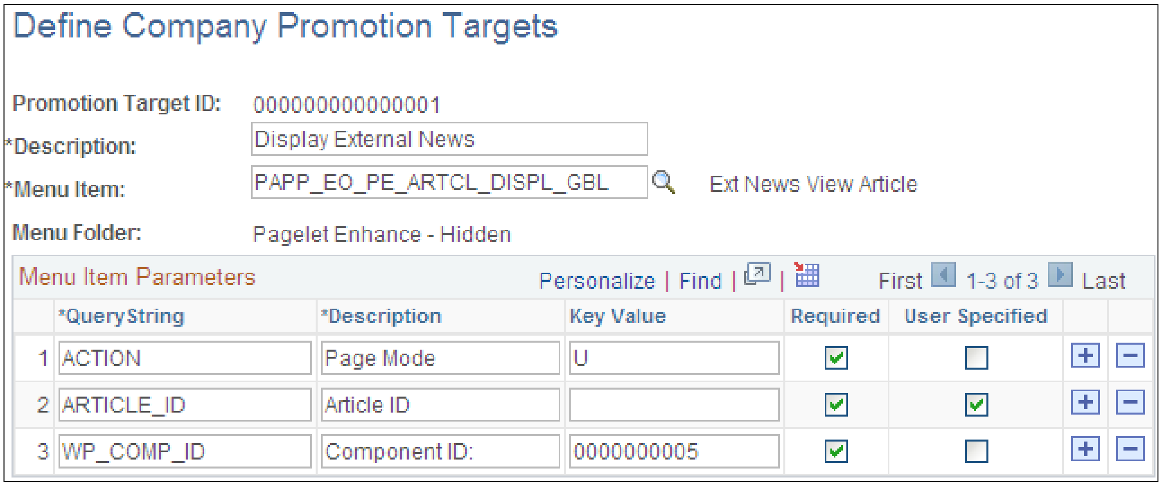
This example illustrates the fields and controls on the Define Company Promotion Targets page. You can find definitions for the fields and controls later on this page.



System administrators can use this page to make portal registry content references available as promotion target pages. Promotion targets can be either a URL definition or a portal registry content reference.

Note: A URL promotion target is any URL definition in the URL catalog of the PeopleSoft Interaction hub database.

Field or Control	***Description***
Promotion Target ID	Use the system-generated promotion ID or assign a new ID.
Menu Item	Select from the content references in the portal registry. The prompt table displays every target content reference that is available in the portal registry. The content reference that you select can be an iScript, a component, or an external URL. **Note:** You might need to add your target page to the portal registry if it is not there. The Promotion Target page does not need to reside in the Portal database, but it must be registered there.
QueryString	Enter the expected Key Field names if the selected menu item requires you to use search keys to access it.
Key Value	Enter the value for key values that are part of the target definition.
Required	Select if the QueryString is required to access the target page. **Note:** If the **User Specified** and **Required** options are selected, you must enter the query key value of string for the promotion when the company promotion is created.

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Field or Control	***Description***
User Specified	Clear the **Key Value** field and select the **User Specified** option if the key value is user-specified.

Example

The following example shows three required query string values. Two of the key values are user-specified, and the third is part of the target definition. The target page requires the search fields BUSINESS_UNIT, PRODUCT_ID, and VENDOR. Any company promotion that uses this target page has the business unit M04 appended as part of the URL query string. The product ID and vendor are defined by each promotion that uses this target page. This results in a link that contains the content reference URL with an appended query string for the search fields BUSINESS_UNIT, PRODUCT_ID, and VENDOR.

Query String	***Key Value***	***Required***	***User-Specified***
BUSINESS_UNIT	M04	Yes	No
PRODUCT_ID	not applicable	Yes	Yes
VENDOR	not applicable	Yes	Yes

Company Promotion Categories Page

Use the Company Promotion Categories page (EO_PE_PR_CAT_TBL) to define company promotions categories.

Navigation:

Portal Administration > **Pagelets** > **Promotions** > **Promotion Categories**

This example illustrates the fields and controls on the Company Promotion Categories page. You can find definitions for the fields and controls later on this page.

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Field or Control	***Description***
Promotion Category	Enter the promotion category name.
Show Section for All Users	Select to make this category a required section on all Company Promotion pagelets. **Note:** If all Company Promotion categories are set to **Show Section for All Users,** users cannot personalize the Company Promotion pagelet.

Company Promotion Page

Use the Company Promotions page (EO_PE_PR_SETUP) to define pagelet content for your promotions.

Navigation:

- **Portal Administration** > **Pagelets** > **Promotions** > **Edit Promotions**
- **My Content** > **Submit Promotions**

This example illustrates the fields and controls on the Company Promotions page (1 of 2).

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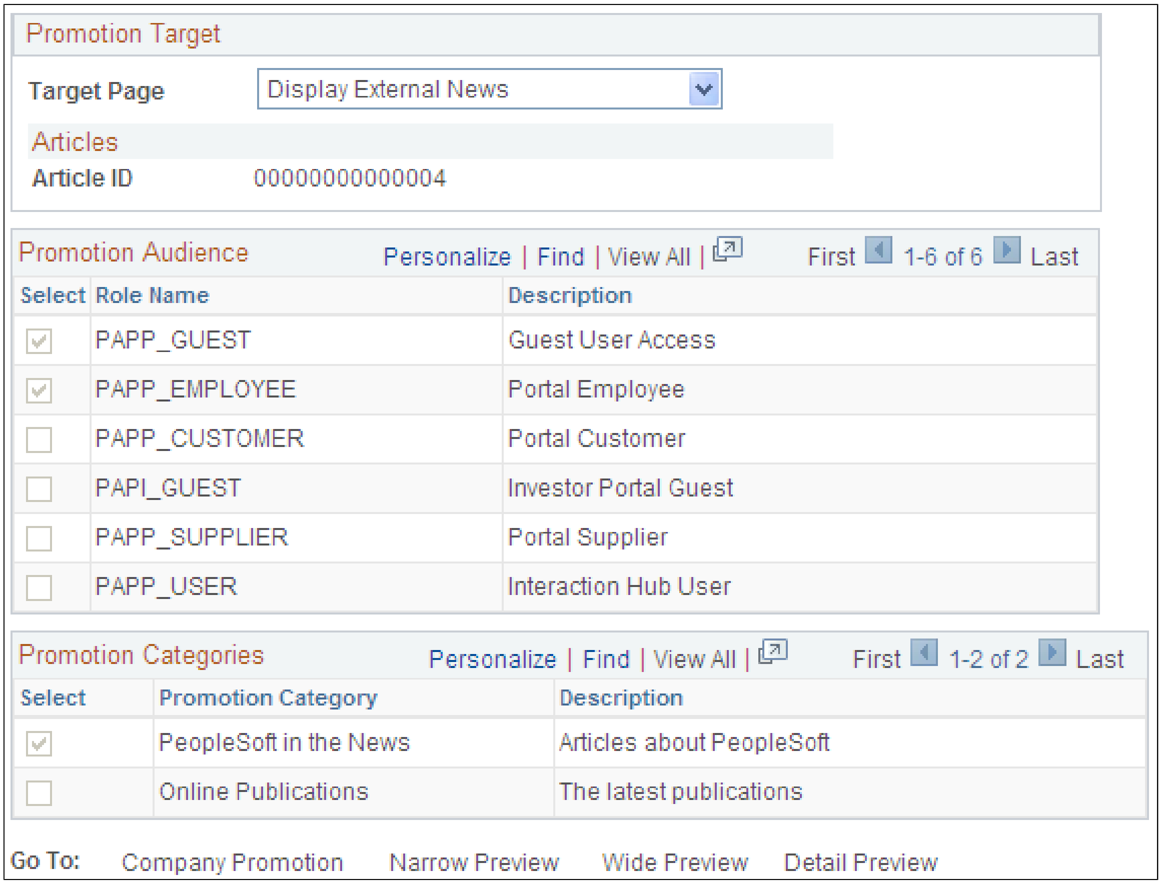
This example illustrates the fields and controls on the Company Promotions page (2 of 2). You can find definitions for the fields and controls later on this page.



Note: A promotion with the publish status *Published* is only accessible in a display-only mode.

Field or Control	***Description***
Promotion ID, Internal Title, Promotion Title, Summary, and **Content**	Complete these fields for each promotion. These entries appear on the user's Company Promotion pagelet or on the detailed view.
Hyperlink Label	Enter a label for the link that enables users to access the promotion item on the target page.
Publish Date	Displays the first date that the promotion appears on the pagelet.
Expiration Date	Displays the date that the promotion is removed from the pagelet.

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Promotion Image

Field or Control	***Description***
Upload Image	Click to add a graphic next to the Company Promotion item on the pagelet. Select a JPG image file from the machine accessing the page via the browse feature.

Promotion Target

Field or Control	***Description***
Target Page	Select either a Promotion Target content reference or a URL as the target page. This is the page that appears when the user clicks the link that is defined in the **Hyperlink Label** field. If the promotion target page that you select requires user-specified key values, these must be entered in the edit box or boxes that display the key value description as the label. **Note:** The key values of the target page appear dynamically based on how the promotion target is defined.

See Define Company Promotion Targets Page.

Promotion Audience

Field or Control	***Description***
Role Name	Select the check box next to the role name for each audience that you want to reach with this promotion. Users see specific promotions selected for them based on their security roles.

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Promotion Categories

Field or Control	*Description*
Promotion Category	Select the check box for the item that you are promoting. The item appears in that promotion category. **Note:** When a promotion has more than one category selected, the promotion appears once in a single category for a given user.

Preview Pagelet Display

Click one of these links to preview the Company Promotions pagelet.

Field or Control	*Description*
Narrow Preview	Click to display promotion image, promotion title, link label, and summary of the promotion.
Wide Preview	Click to display a longer and wider view of the pagelet with the promotion image, promotion title, link label, and summary of the promotion.
Detail Preview	Click to display promotion image, promotion title, link label, content description, and expiration fate of the promotion. **Detail Preview** also appears when you click the **More** link on the Company Promotion pagelet on the Homepage.

Related Links

Viewer Roles Page

Managing Company Promotions

This topic discusses working with submitted promotions pagelet and company promotions pagelet.

Pages Used to Manage Company Promotions

Page Name	*Definition Name*	*Usage*
Manage Company Promotions Page	EO_PE_PR_MANAGE	Track and update your promotions.

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Page Name	*Definition Name*	*Usage*
Personalize Company Promotions Page	EO_PE_PR_PERS	Specify company promotions to display on the Company Promotions pagelet.

Manage Company Promotions Page

Use the Manage Company Promotions page (EO_PE_PR_MANAGE) to track and update your promotions.

Navigation:

Portal Administration > **Pagelets** > **Promotions** > **Manage Promotions**

This example illustrates the fields and controls on the Manage Company Promotions page. You can find definitions for the fields and controls later on this page.

After your promotions are created, you can view, publish, or rework them. You can also make changes by displaying the Company Promotion setup page.

Field or Control	*Description*
Filter By	Select the *Pending, Published, Remove,* or *Rework* option to limit the number of promotions to display.
Fetch	Click to display the promotions that meet your selection criteria.
	Click the **Promotion ID** icon to access the Company Promotion setup page for this item.

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Field or Control	*Description*
Status	Select the *Pending, Publish, Remove,* or *Rework* option to change the status of the promotion. Changing the status to *Publish* makes the publication available to display on the Company Promotions pagelet if the role of the user has been selected for that item.

Submitted Promotions Pagelet

Access the Submitted Promotions pagelet (click the **Content** link on the menu bar on the Homepage, and then select the **Submitted Promotions** option in the Personalize Content page).

This is the screenshot of Submitted Promotions pagelet.

Use this pagelet to track submitted promotions and their publishing status directly from your Homepage.

From this pagelet, you can access the Submit Content page for the company promotions item by clicking the link for the promotion that you want to view. If you have not authored a company promotion, a message states that no items are available. If you have authored more than five promotions, you can search for specific authored items using the **View More Promotions** link. The items are displayed by the order of the publication dates.

Note: This pagelet displays only items that have been authored by the current user.

Personalize Company Promotions Page

This section discusses how to:

- Personalize the Company Promotions pagelet.
- Use the Company Promotions pagelet.

Personalize Company Promotions Page

Use the Personalize Company Promotions page (EO_PE_PR_PERS) to specify company promotions to display on the Company Promotions pagelet.

Navigation:

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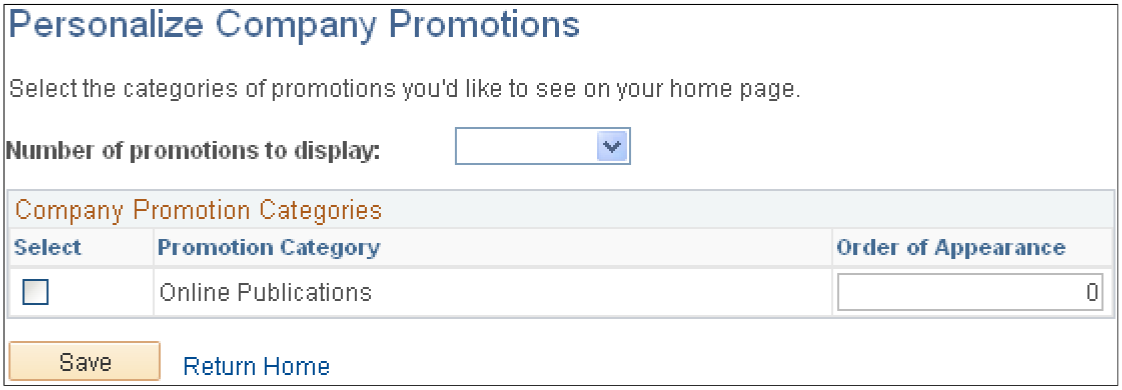
From the Homepage, click the **Customize** icon on the Company Promotions pagelet.

This example illustrates the fields and controls on the Personalize Company Promotions page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Number of promotions to display	Select the number of promotions to display on your Company Promotions pagelet.
Promotion Category	Select for each promotion category that you want to display on your Company Promotions pagelet. **Note:** If all promotion categories are required, the system displays a message on the page indicating that personalization is not available.
Order of Appearance	Enter the order in which you want the promotion categories to display on your Company Promotions pagelet.

Company Promotions Pagelet

Access the Company Promotions pagelet (click the **Content** link on the menu bar on the Homepage, and then select the **Company Promotions** option in the Personalize Content page).

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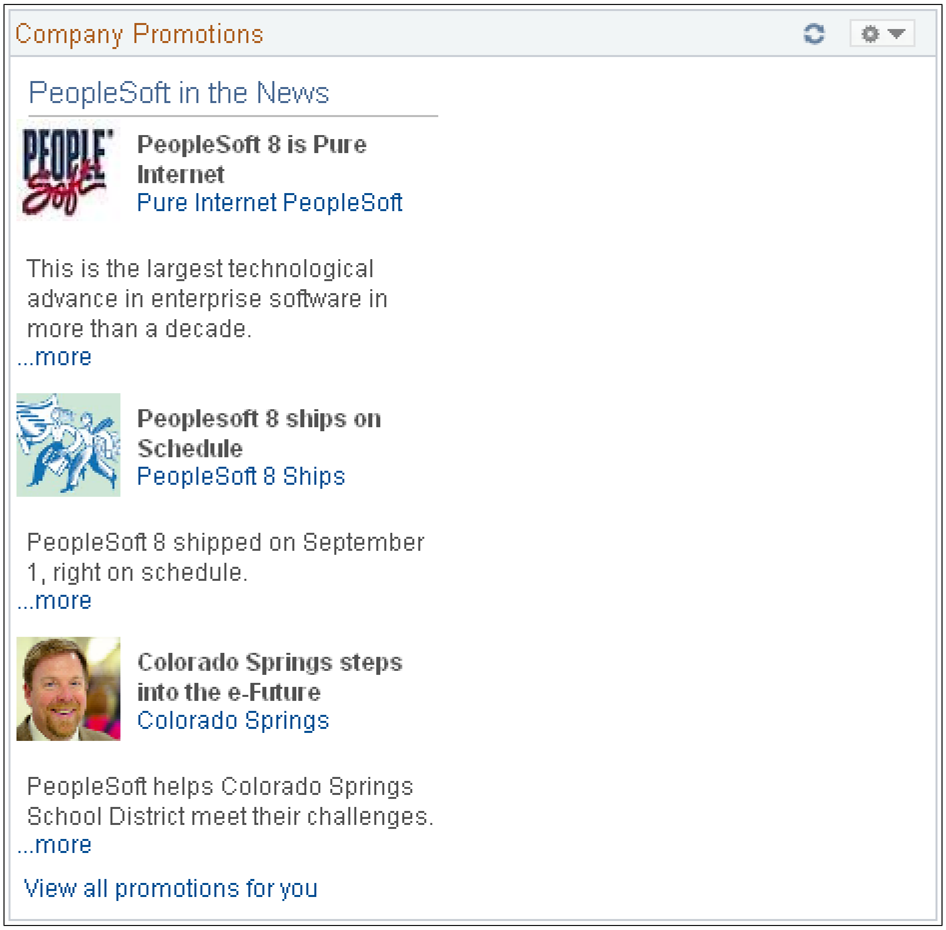
This example illustrates the fields and controls on the Company Promotions pagelet.



Use the Company Promotions pagelet to view published promotions. Click the promotion links to access the content being promoted.

Related Links

Understanding Company Promotions

Viewing Company Promotions by Role

This section discusses how to:

- View promotions by role.
- Work with the Promotions by Role pagelet.

Content Inquiry by Role Page

Access the Content Inquiry by Role page (EO_PE_PR_ROLE_INQ) (select **Portal Administration** > **Pagelets** > **Promotions** > **View Promotions by Roles).**

This example illustrates the fields and controls on the Content Inquiry by Role page.

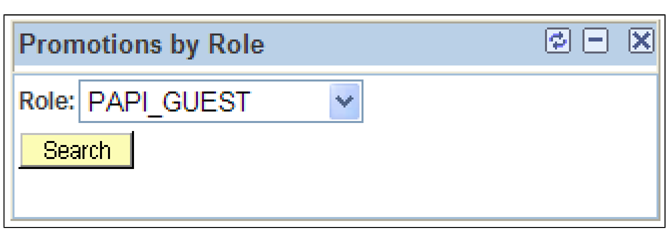
Use this page to list the promotions that are available to appear on the Company Promotions pagelet for a specific user role.

Field or Control	***Description***
	Click the **Promotion Information** icon to go to the Company Promotions page and view detail information about this item. **Note:** Information on the Company Promotion section is display-only.

Promotions by Role Pagelet

Access the Promotions by Role pagelet (click the **Content** link from the menu bar on the Homepage, and then select the **Promotions by Role** option in the Personalize Content page).

This example illustrates the fields and controls on the Promotions by Role pagelet.



Use the Promotions by Role pagelet to carry out a search for promotions by role on the Content Inquiry by Role page.

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Field or Control	***Description***
Role	Select the role for the promotions that you want to view.
Search	Click to access the Content Inquiry by Role page, where the results of your search appear.

Related Links

Viewing Company Promotions by Role

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Chapter 11

Setting Up and Managing Web Magazines

Understanding Web Magazine

This section discusses:

- Web Magazine overview
- Web magazine hierarchy
- Web magazine viewing security
- Web magazine benefits

Web Magazine Overview

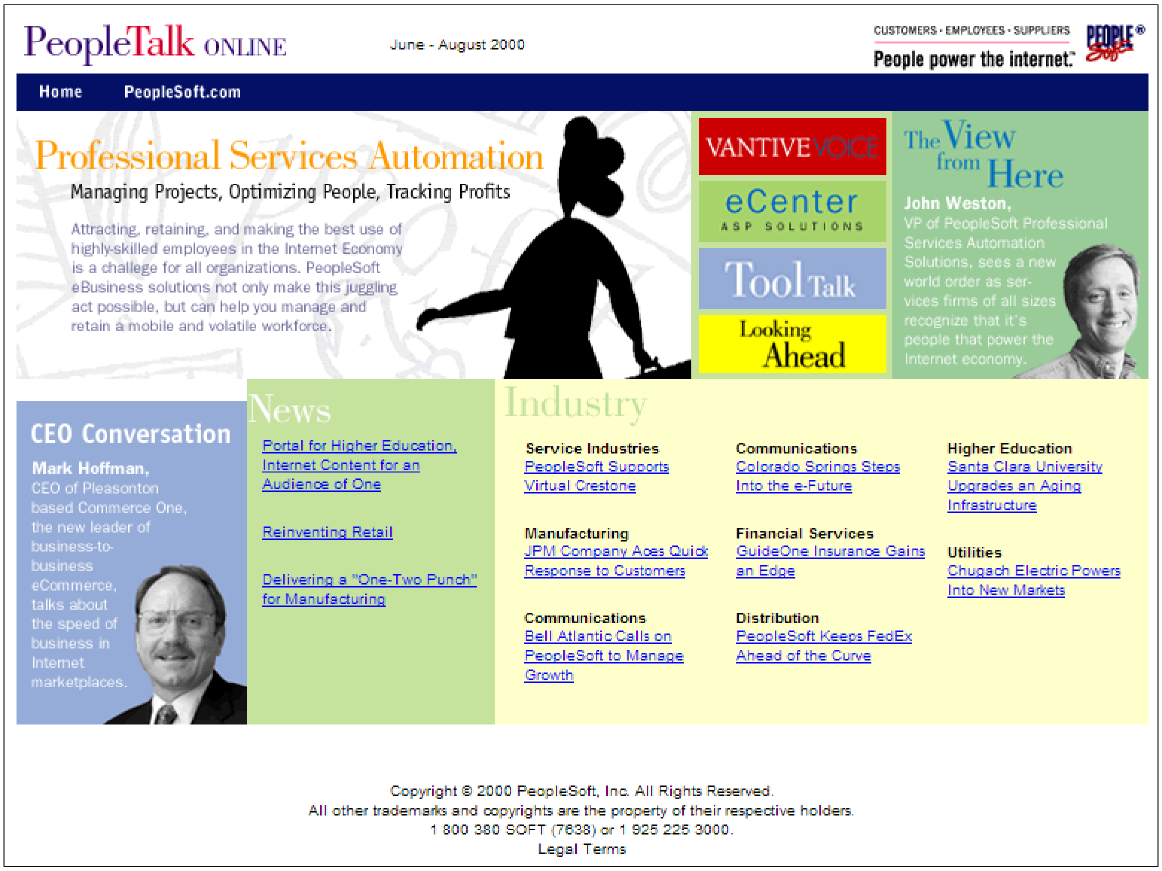
Web Magazine is an online publishing feature that enables users to create and publish collections of content such as department newsletters, policy handbooks, or mini-web sites through a graphical format. Web Magazine provides a way to communicate information to people in the organization who have access to the PeopleSoft portal.

Moving communications from printed materials to web publications greatly reduces printing costs without sacrificing graphical quality. Moreover, you can easily update and distribute web-based information.

Web Magazine includes the Web Magazines pagelet, which lists current and historical issues under a publication heading. The cover page is the first page that you see after selecting an issue. This page is your main navigation point to the rest of the publication. Common features of the cover page include the title bar and the publication navigation bar. You click links on the cover page to access other parts of the publication.

This is an example of a web magazine cover page:

This example illustrates the fields and controls on the Example of a web magazine cover page.



Note: Web magazines point to a single layout.

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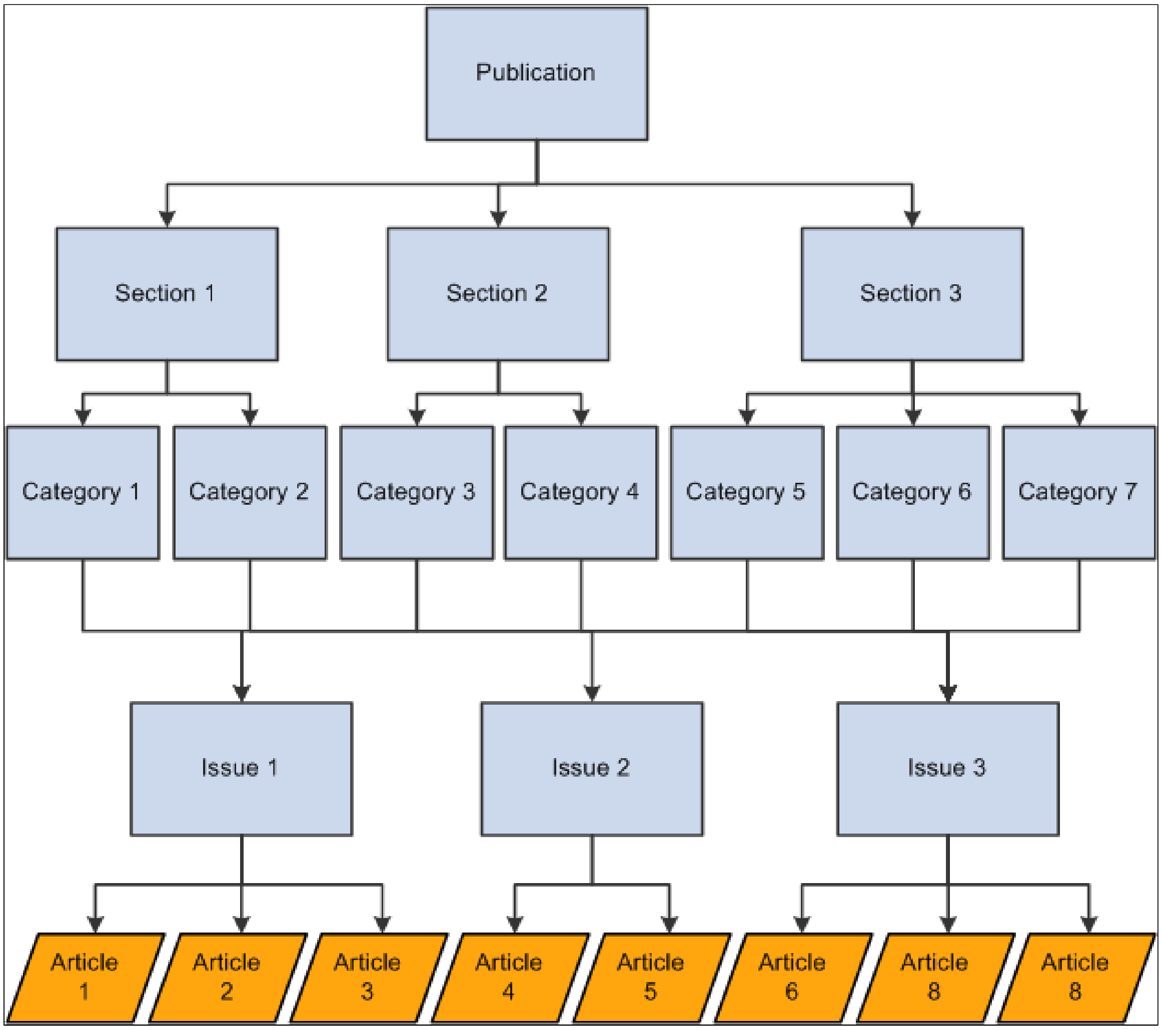
Web Magazine Hierarchy

This example illustrates the information hierarchy in a Web Magazine.



Within this framework, you can organize information to suit your needs.

Example Hierarchy

PeopleTalk Online is a publication, and *September - October 2004* is an issue that includes a particular collection of articles. *Industry* is a section, and *Manufacturing* is a category within that section. Within the Manufacturing category, the *JPM Company Aces Quick Response to Customers* article appears.

Web Magazine Viewing Security

To set up pagelet and magazine viewing security:

1. Select **Portal Administration** > **Navigation** > **Structure and Content.**
2. In the Folders section, click the **Portal Administration** link and then click the **Pagelets** link.
3. Click the **Edit** link for Web Magazine folder.

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4. Select the Folder Security tab.

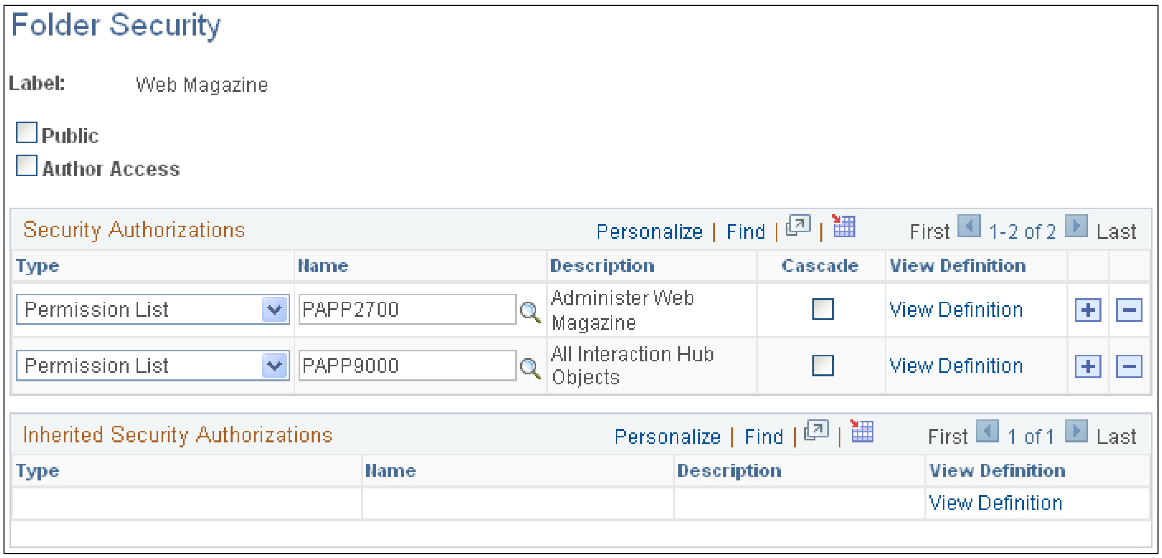
   The Folder Security page appears.

5. Select the *Public* option if no restriction exists for accessing the Web Magazines pagelet.

   Alternatively, to grant access selectively to the Web Magazines pagelet, select the *Permission List* option and select the appropriate permission lists.

This is an example of the Folder Security page:

This example illustrates the fields and controls on the Folder Security page.



See *PeopleTools: Security Administration*, "Setting Up Roles" for more information about web magazine viewing security.

Related Links

"Summary of Delivered Security Data" (Portal and Site Administration)

Web Magazine Benefits

This table describes some of the benefits of using the Web Magazine feature:

Benefit	***Description***
Content is stored and managed separately from the page presentation layout.	Web objects, such as text and images, can be reused, updated, or retired to provide a real-time, dynamic web publication using HTML templates.
Content components are stored in a centralized repository in a PeopleSoft Interaction hub database.	This repository is separate from the Content Management repository.

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Benefit	***Description***
Presentation templates can be customized for any type of web page.	Templates for the front cover page, sections, and article pages are delivered with PeopleSoft Interaction hub to give you a quick start.

Setting Up Web Magazines

This topic discusses creating publications, creating new issues, defining sections of publication and defining section categories to set up web magazines.

Pages Used to Set Up a Web Magazine

Page Name	***Definition Name***	***Usage***
Publication Page	EO_PE_PUBWP	Add or update information about a publication.
Issue Page	EO_PE_ISSUEWP	Add or edit information about an issue of a publication.
Section Page	EO_PE_SECTIONWP	Add or edit information about a section of an issue.
Category Page	EO_PE_CATEGORYWP	Create and store all the information about a category of a section.

Publication Page

Use the Publication page (EO_PE_PUBWP) to add or update information about a publication.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Publications**

This example illustrates the fields and controls on the Publication page.

Use this page to create a new publication or edit the names of existing publications.

Field or Control	***Description***
Long Name	Enter the name that will appear on setup pages.
Short Name	Enter the name that will appear on the Web Magazines pagelet.

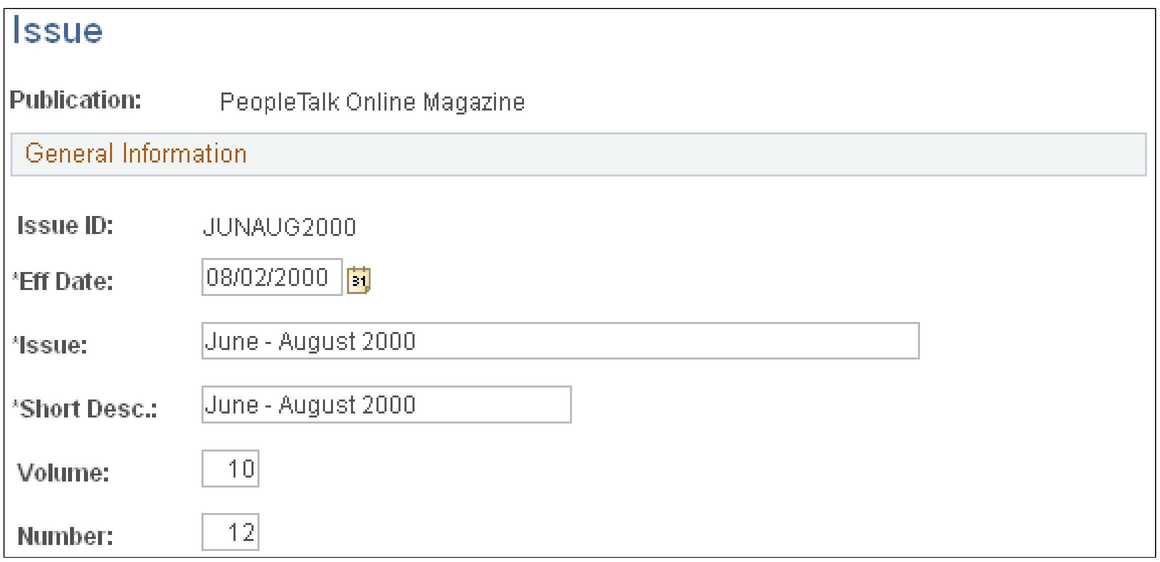
Issue Page

Use the Issue page (EO_PE_ISSUEWP) to add or edit information about an issue of a publication.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Issues**

This example illustrates the fields and controls on the Issue page.



Use this page to create new issues for publications. Enter an effective date that determines when the issue will become available on the Web Magazine pagelet. Volume and sequence numbers are informational only and not used by the system.

Specifying Back Issues

Use PeopleSoft Application Designer to specify the number of back issues that will appear on the Web Magazines pagelet. The delivered value is a maximum of five issues for each publication.

To specify the number of back issues that will appear:

1. Modify the function *IScript_BuildWPPagelet()* in *WEBLIB_WEBPUB.EO_PE_PUB.FieldFormula.*

2. Scan for all occurrences of *&RowMax* and set it to the desired number.

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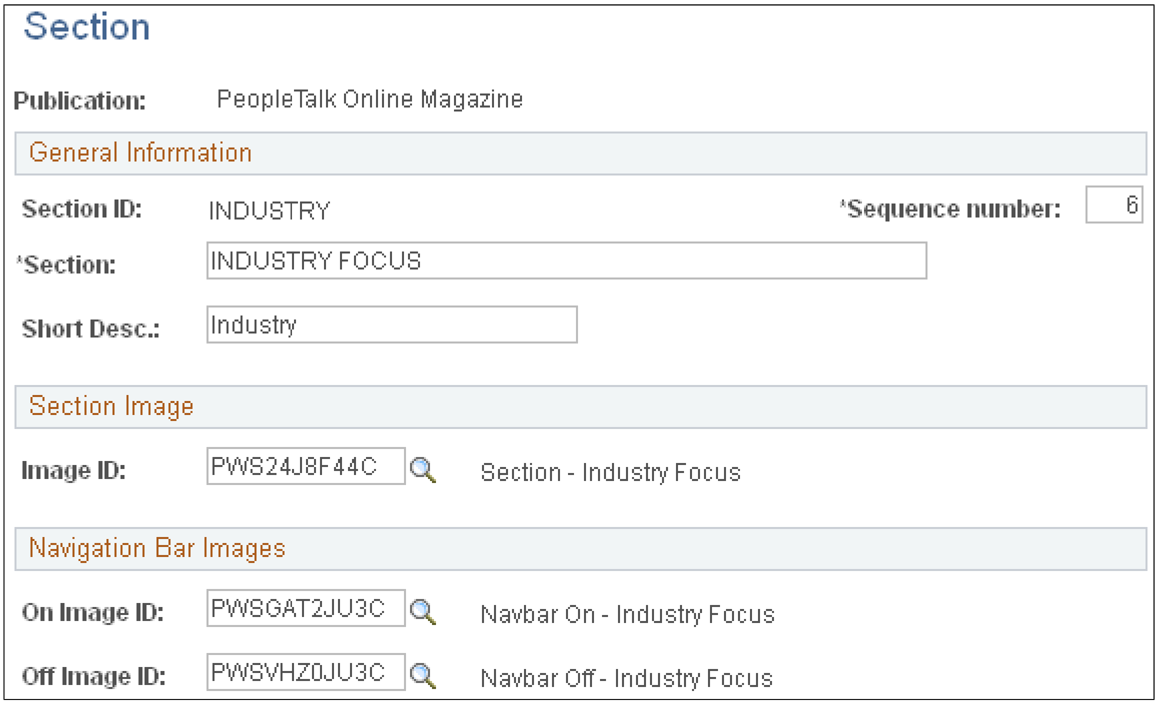
Section Page

Use the Section page (EO_PE_SECTIONWP) to add or edit information about a section of an issue.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Sections**

This example illustrates the fields and controls on the Section page.



Use this page to define the different sections of a publication.

Field or Control	***Description***
Sequence Number	The sequence number designates the placement of the section in the publication: *1* for the first section, *2* for the second section, and so on.
Image ID	Select an ID that the Web Magazine template use to reference the section image.
On Image ID	Select an ID for an image that appears in the section navigation bar when the user is in this section.
Off Image ID	Select an ID for an image that appears in the section navigation bar when the user is not in this section.

Related Links

Maintaining Graphic Images

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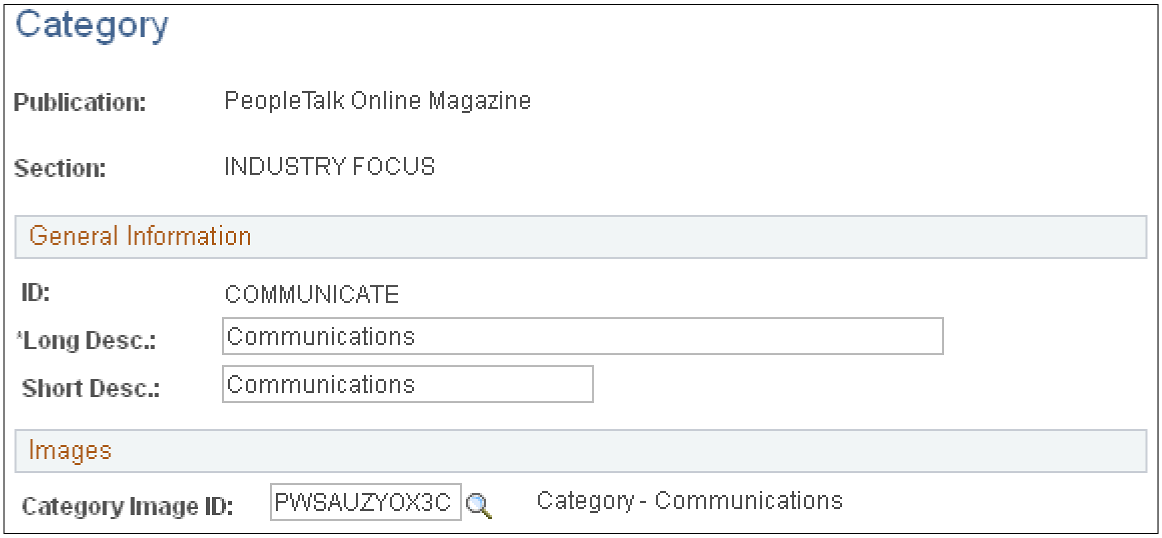
Category Page

Use the Category page (EO_PE_CATEGORYWP) to create and store all the information about a category of a section.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Categories**

This example illustrates the fields and controls on the Category page.



Use this page to define categories for each section of the publication. The selected category image appears in the Web Magazine template.

Maintaining Graphic Images

This section discusses how to register images.

Image Page

Access the Image page (EO_PE_IMGWP) (select **Portal Administration** > **Pagelets** > **Web Magazine** > **Images).**

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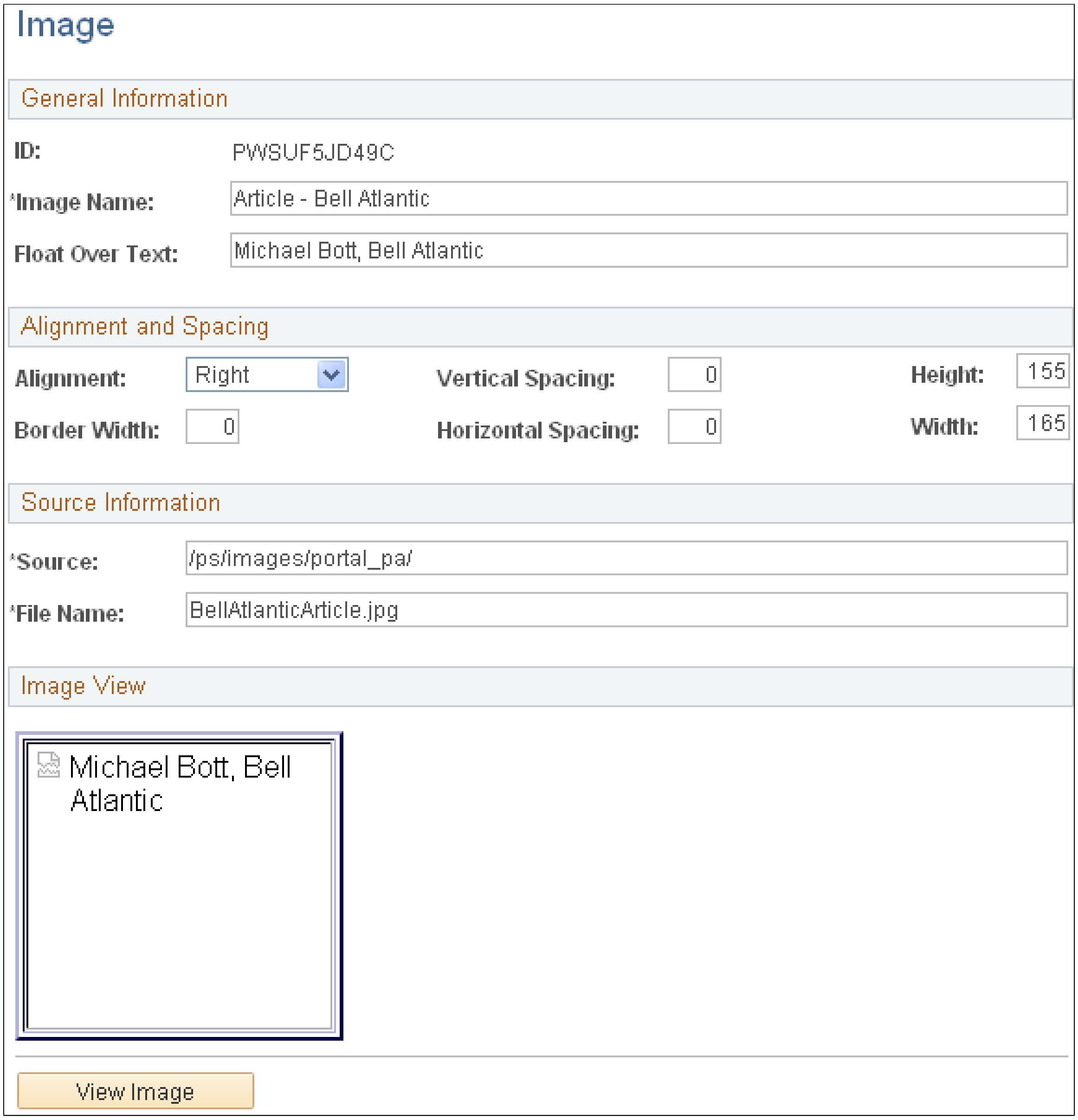
This example illustrates the fields and controls on the Image page.



Use this page to add, edit, and register the images that you want to use with Web Magazine articles.

Note: Before creating articles, you must set up issue definitions and place the images you want to use in the proper directory for Web Magazine to access.

Field or Control	*Description*
ID	Displays the unique value entered on the Search page. An ID is a key field and it cannot be altered after it is entered.

Field or Control	***Description***
Image Name	Enter the name of the image. You may want to prefix the name with an indication of the use of the image; for example, cover, section, category, title, or article.
Float Over Text	Enter the text that appears when the user moves the cursor over the image.
Alignment	Select the image alignment. Available options are *Absbottom, Absmiddle, Baseline, Bottom, Left, Middle, Right, Textop,* or *Top.*
Vertical Spacing	Enter the number of pixels on the top and bottom of the image for vertical spacing.
Horizontal Spacing	Enter the number of pixels on the left and right of the image for horizontal spacing.
Height, Border Width, and **Width**	Enter the number of pixels for the image height, border width, and width.
Source	Enter the relative path on the web server where the image file is located. **Note:** You must manually add the image to the web server directory that is specified in this field.
File Name	Enter the file name of the image.
View Image	Click to preview the image.

Creating and Publishing Articles

This topic discusses creating articles and adding article text.

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Pages Used to Create and Publish Articles

Page Name	*Definition Name*	*Usage*
Article Page	EO_PE_ARTICLEWP1	Add and maintain general information about an article, including the title and summary, image assignment, and placement in a publication.
Article Text Page	EO_PE_ARTICLEWP2	Add, edit, or view the text of the article.

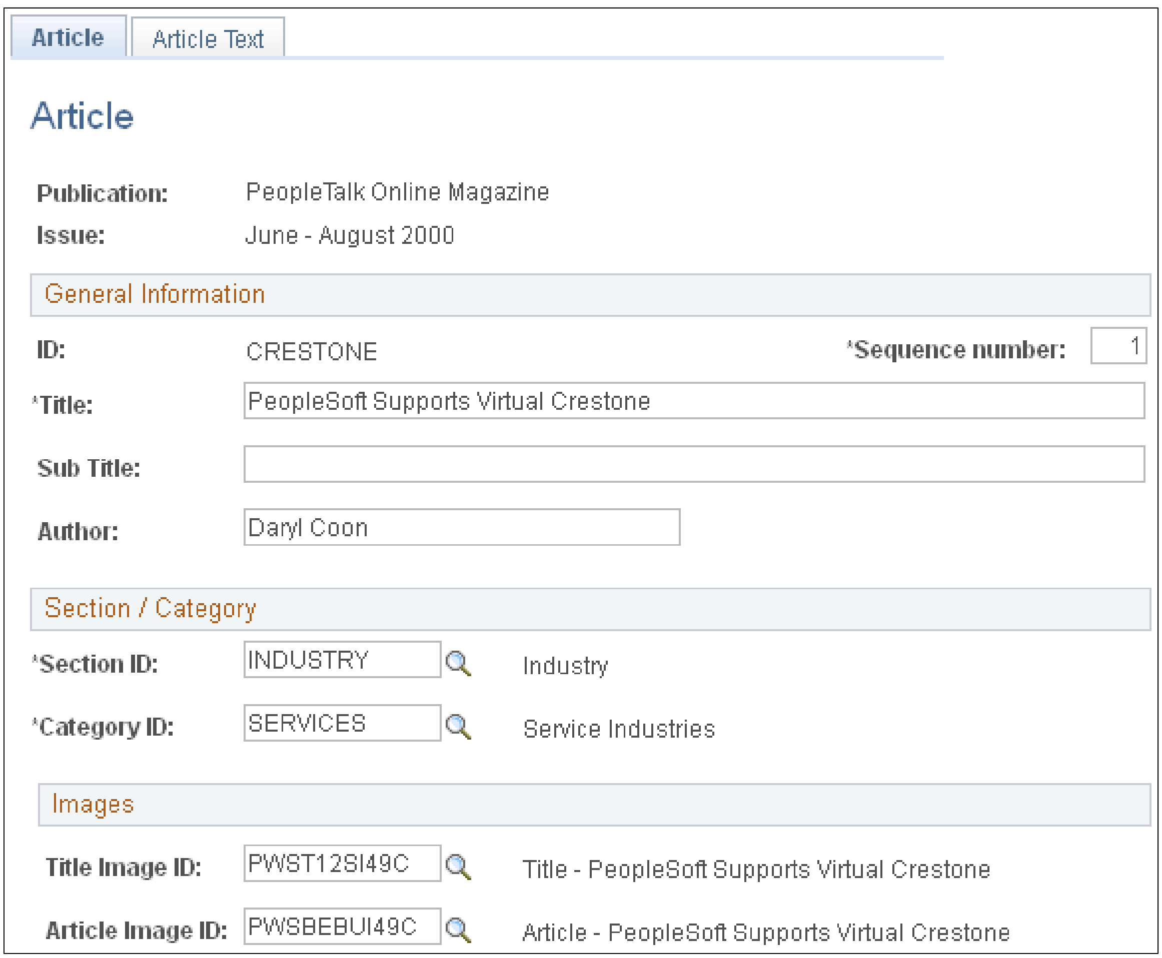
Article Page

Use the Article page (EO_PE_ARTICLEWP1) to add and maintain general information about an article, including the title and summary, image assignment, and placement in a publication.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Articles**

This example illustrates the fields and controls on the Article page.



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Use this page to capture information that will be used later by the magazine template code when it renders the article in the portal.

Field or Control	***Description***
Publication and **Issue**	Displays the publication and issue where this article will appear.
ID	Displays the unique value entered on the Search page. An ID is a key field and it cannot be altered after it is entered.
Sequence number	Enter the article sequence number to specify the order in which you want the article to appear in the section.
Title, Sub Title, and **Author**	Enter the article title, subtitle, and the name of the article's author.
Section ID and **Category ID**	Choose the publication section and category where this article will appear.
Title Image ID and **Article Image ID**	Enter the title and article image IDs for this article.

Article Text Page

Use the Article Text page (EO_PE_ARTICLEWP2) to add, edit, or view the text of the article.

Navigation:

Portal Administration > **Pagelets** > **Web Magazine** > **Articles**

Select the Article Text tab on the Article page.

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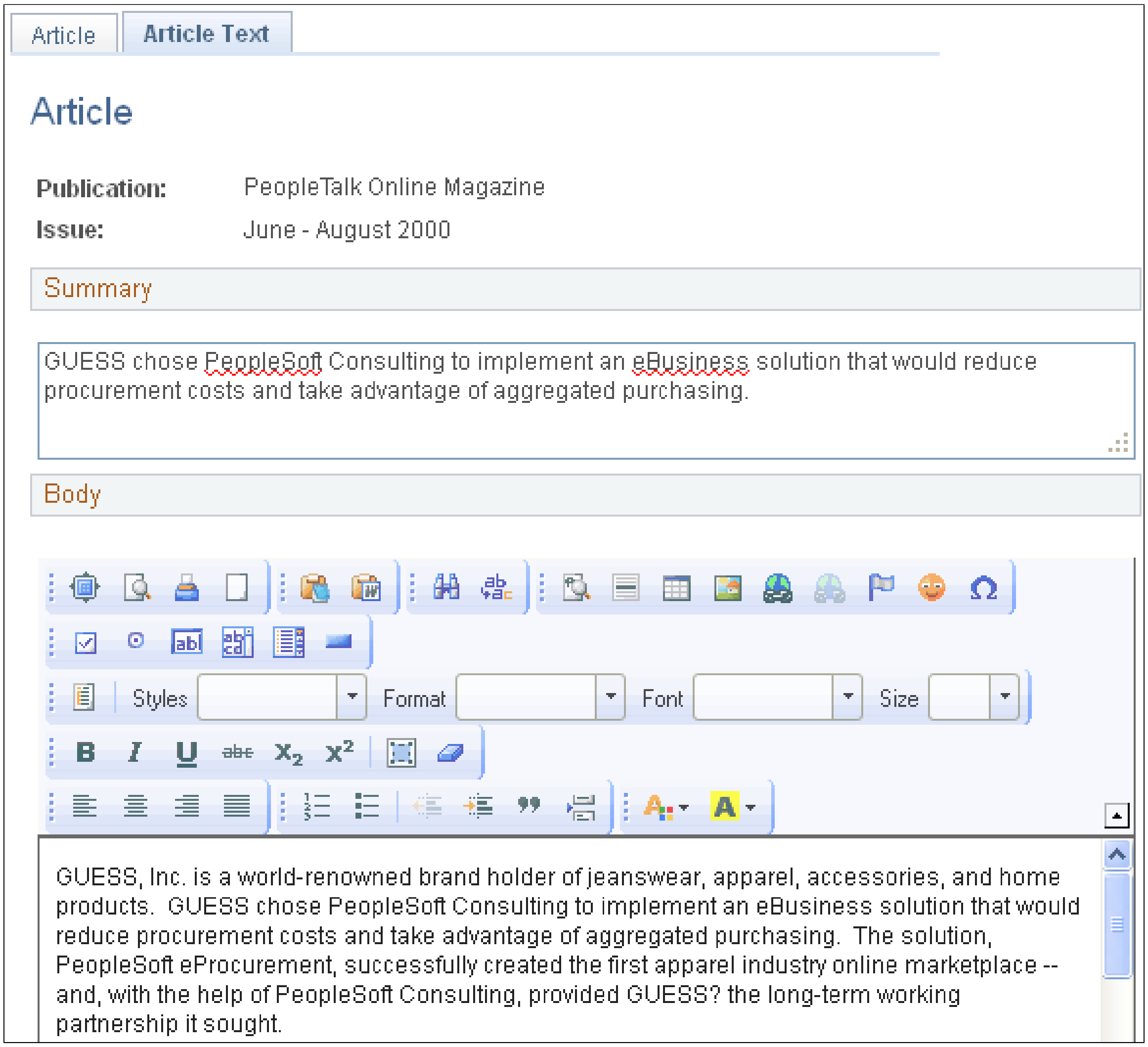
This example illustrates the fields and controls on the Article Text page.

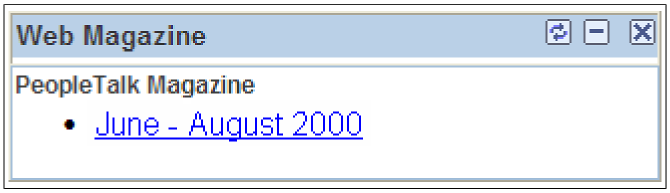


Field or Control	***Description***
Summary	Enter summary text for this article.
Body	Enter the full article in plain text or HTML format.

Working With the Web Magazine Pagelet

Access the Web Magazine pagelet (click the **Content** link from the menu bar on the homepage and then select the **Web Magazine** option in the Personalize Content page).

This example illustrates the fields and controls on the Web Magazine pagelet.



The Web Magazine pagelet lists current and historical issues under a publication heading. Issues are sorted in descending order according to the effective date of the issue. The pagelet does not list all back issues because it lists a maximum of five issues by default. You can customize the pagelet by altering the iScript PeopleCode.

If no issues exist for a publication, the text *No Issues Available* appears.

Related Links

Understanding Web Magazine

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Chapter 12

Creating Custom Templates for Web Magazines

Constructing Templates for Cover Pages

To construct a template for a Web Magazine cover page:

1. Design the template in HTML markup.

   Before creating a template, decide on the page design and break it up into table cells.

   Code example:

```
<HTML>
<HEAD><TITLE> PeopleTalk: Home Page </TITLE></HEAD>
<BODY LEFTMARGIN="0" TOPMARGIN="0" MARGINWIDTH="0" MARGINHEIGHT="0">
 <TABLE BORDER="1" CELLPADDING="0" CELLSPACING="0" WIDTH="760">
<!-- Header -->
<TR><TD height=34>%BIND(:1)</TD></TR>
<!-- Navigation Bar 1 -->
<TR><TD height=25 bgcolor=gray>%BIND(:2)</TD></TR>
</Table>

(code deleted)

<table border="0" cellpadding="0" cellspacing="0" width="760">
<tr><td valign="bottom">
<!-- <a href="/en/new/peopletalk/jun2000/ceo/index.html"> -->
<IMG SRC="/peoplesoft8/images/webpublishing/PWSYBONQO8C.gif"
ALT="Mark Hoffman" width="155" height="217" ALIGN="top" border="0"hspace="0">
<!-- </a>-->
</td>

<td valign="top" bgcolor="#C6E39E">
       <table border="0" cellpadding="0" cellspacing="0" width="166">
              <tr valign="top">
              <td>
                      <a href="%BIND(:6)?ICType=Script&ICScriptProgramName=WEB⇒

LIB_
WEBPUB.EO_PE_TEMPLATES.Field
Formula.IScript_SectionArticleTemplate&PUB=PEOPLETALK&ISSUE=%BIND(:7)&SECTION=
NEWS">
                      <img src="/peoplesoft8/images/webpublishing/PWS5JA6S59C.⇒

gif"
 width="56" height="35" vspa
ce="0" hspace="3" border="0">
                      </a>
              </td>
              </tr>

              <tr valign="top">
              <td>
                    %BIND(:3)
              </td>
              </tr>
```

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```
         </table>
</td>

<td valign="top" bgcolor="#FFFFCC">
     <a href="%BIND(:6)?ICType=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_S
ectionArticleTemplate&PUB=PEOPLETALK&ISSUE=%BIND(:7)&SECTION=INDUSTRY">
     <IMG SRC="/peoplesoft8/images/webpublishing/PWS24J8F44C.gif" ALT="Industr⇒

y
 Focus" width="439" height="32"
 ALIGN="top" border="0" hspace="0" vspace="Variables.ivspace">
     </a>
     <table width="100%" border="0" cellspacing="5" cellpadding="0">
         <tr valign="top">
         <font face="Arial, Helvetica, sans-serif" size="1" color="#000066">
         <td>
                   %BIND(:4)
         </td>
         </font>
         </tr>
    </table>

</td>
</tr>
</table>

<!-- Footer -->
<TABLE BORDER="1" CELLPADDING="0" CELLSPACING="0" WIDTH="760">
<TR>
<TD>
%BIND(:5)
</TD>
</TR>
</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools, and save the object.

3. Add the appropriate BIND parameters to each cell in the HTML object for your template.

4. Save the HTML object in PeopleTools.

5. Open the record WEBLIB_WEBPUB in PeopleTools.

6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   Edit this PeopleCode as needed.

7. Call functions to get the values for the bind variables.

   a. Under the function IScript_WebPublishing, add the appropriate functions to bind values to the values that you have set up in your HTML object (the cover page template).

      In the following example, we show how to bind a value to the fourth bind variable. The fourth bind variable in the article template represents the articles for the section *INDUSTRY.* A function is delivered with Web Magazine feature to get the article listing for a section. This function is called IScript_GetSectionArticles.

   b. From the PeopleCode in IScript_WebPublishing, call the function IScript_GetSectionArticles and set it to a string variable.

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In our example, we set the return value of the function to the variable &IndustryFocus.

Example:

```
rem;
rem    Get the Articles for the INDUSTRY;
rem;
rem    Parameters Values for the Function Call;
rem    Number   Description      Value
rem    ---------- -------------------    ---------
rem    1      Number of Columns    3
rem    2      FontSize      1
rem    3      Section Title On    0 (FALSE)
rem    4      Category Title On    1 (TRUE)
rem    5      ArticleSummary On   0 (FALSE)
rem    6      More... On      0 (FALSE)
rem    7      Section Name      "INDUSTRY"
rem;
&IndustryFocus = IScript_GetSectionArticles(3, 1, 0, 1, 0, 0, "INDUSTRY")⇒

;
```

8. Bind function values to the HTML object (cover page template).

   Specifically, bind &IndustryFocus into our HTML object (cover page template) using the function GetHTMLText.

   This function takes our HTML object (cover page template), which was saved as EO_PE_FRONTPAGETEMPLATE, and binds the bind values into it. These values must occur in the order in which they were specified in the HTML object. The variable &IndustryFocus is listed fourth because it is the fourth bind variable.

   Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1,
 &CompanyNews, &IndustryFocus, &H
TMLFooter, &articleURL, &sectionURL, IScript_GetImage("PWSH507PO8C"), IScript_⇒

Get
Image("PWSEP6SXO8C"), IScript
_GetImage("PWSPS3TQO8C"), IScript_GetImage("PWS4MT7QO8C"), IScript_GetImage
("PWSTRUTPO8C"), IScript_GetImage("
PWSPB7CPO8C"), IScript_GetImage("PWSYBONQO8C"), IScript_GetImage("PWS5JA6S59C"⇒

),
 IScript_GetImage("PWS24J8F44C
"));
```

9. Include the cover page template in the portal.

10. Repeat the process and bind additional cells within the HTML object (cover page template).

    For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values.

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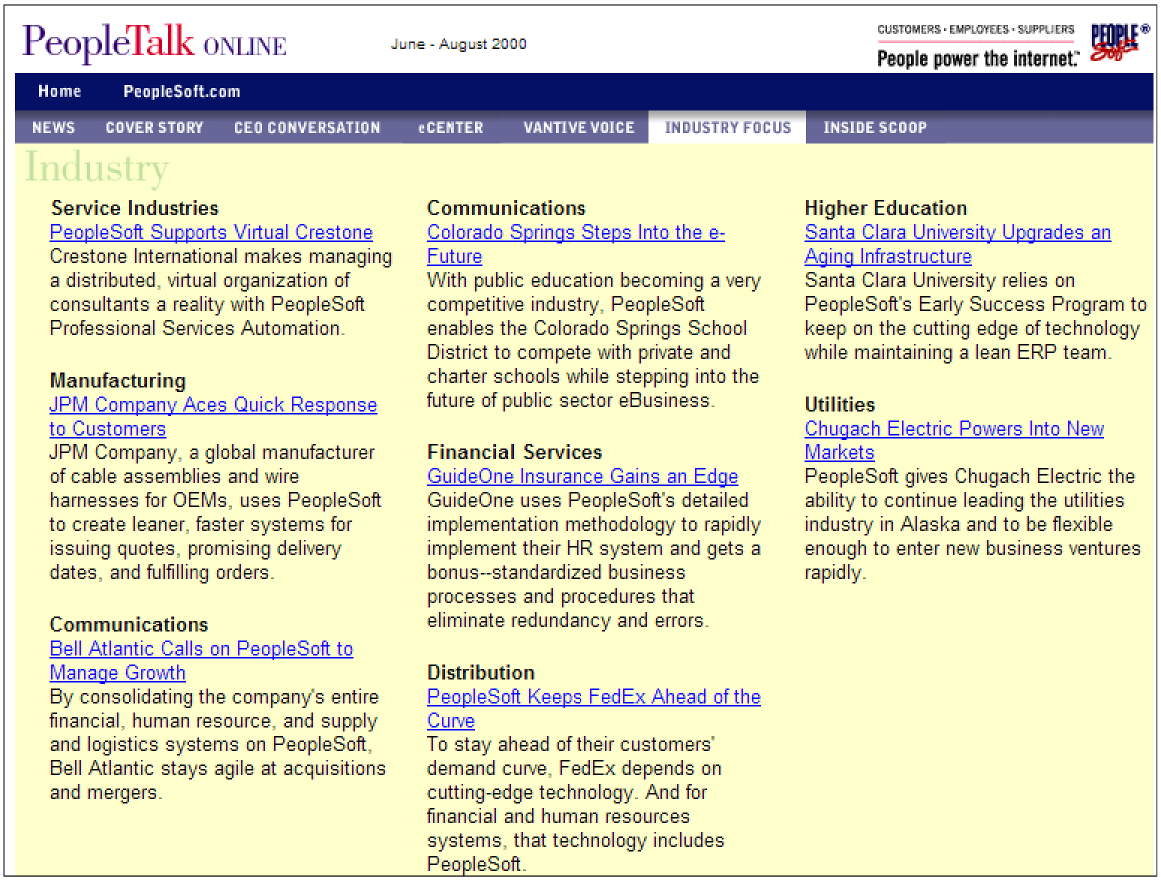
Displaying Articles in a Section

Use the section page layout to display the articles in a particular section of the publication. On the section page, the title bar and navigation bar appear with the section navigation bar.

You can use the section navigation bar to access all sections in the publication. In the following example, the navigation bar appears only on the section page and the article page. However, you can also place it in the cover page layout.

This example illustrates section page with a section navigation bar.



To construct a template for a Web magazine section:

1. Design the template in HTML.

   Before creating the template, decide on the page design and break it up into table cells.

   Code example:

```
<HTML>
<HEAD>
<TITLE> PeopleTalk: Home Page </TITLE>
<meta name="keyword" content="PSA  Professional Services Automation">

<style type="text/css">

A:HOVER {
   font-family : Arial, Helvetica, sans-serif;
```

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```
   color: #FF0066;
}

A:LINK {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
}

A:VISITED {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
}

.bodytext {
   font-family : Arial, Helvetica, sans-serif;
   font-size : 10pt;
   color : #000000;
   background-color : #FFFFCC;

}

</style>

 </HEAD>


<BODY>

<TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760">

<!-- Header -->
<TR>
<TD>
%BIND(:1)
</TD>
</TR>

<!-- Navigation Bar 1 -->
<TR>
<TD>
%BIND(:2)
</TD>
</TR>

<!-- Navigation Bar 2 -->
<TR>
<TD BACKGROUND="%BIND(:3)">
%BIND(:4)
</TD>
</TR>


<!-- Section Image -->
<TR>
<TD>
       <TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760" BGCOLOR="⇒

#FFFFCC">
       <TR>
       <TD class="bodytext">
       %BIND(:5)
       </TD>
       </TR>
       </TABLE>
</TD>
</TR>

<!-- Section Articles -->
<TR>
<TD>
       <TABLE class="bodytext" BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDT⇒
```

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```
H=
"760" BGCOLOR="#FFFFCC">
       <TR>
       <TD>
       %BIND(:6)
       </font>
       </TD>
       </TR>
       </TABLE>
</TD>
</TR>
<!-- Footer -->
<TR>
<TD>
%BIND(:7)
</TD>
</TR>

</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools.

3. Add the appropriate BIND parameters to each cell in the HTML object for the template.

4. Save the HTML object in PeopleTools.

5. Open the record WEBLIB_WEBPUB in PeopleTools.

6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   Edit the PeopleCode as appropriate.

7. Call functions to get the values for the BIND variables.

   a. Under the function **IScript_SectionArticleTemplate**, add the appropriate functions to bind values to the values that you have set up in your HTML object (the article template).

      In the following example, we show you how to bind a value to the sixth bind variable. The sixth cell in the article template represents an article listing for all articles in the section. A function is included with Web Magazine that gets all the articles for a section. This function is called **IScript_GetSectionArticles**.

   b. From the PeopleCode in **IScript_SectionArticleTemplate**, call the function **IScript_GetSectionArticles** and set it to a string variable.

      In our example, we set the return value of the function to the variable *&HTMLBody*.

      Example:

```
rem;
rem    Get the Articles for the DEFAULT;
rem;
rem    Parameters Values for the Function Call;
rem    Number      Description      Value;
rem    ----------    -------------------    ---------;
rem    1      Number of Columns    3;
rem    2      FontSize      2;
rem    3      Section Title On    0 (FALSE);
rem    4      Category Title On    1 (TRUE);
rem    5      ArticleSummary On   1 (TRUE);
```

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```
rem    6      More... On      0 (FALSE);
rem    7      Section Name      "";
rem;
&HTMLBody = IScript_GetSectionArticles(3, 2, 0, 1, 1, 0, "");
```

8. Bind function values to the HTML object (section template).

   Bind *&HTMLBody* into HTML object (section template) using the function **GetHTMLText**.

   Function **GetHTMLText** takes our HTML object (section template), which was saved as EO_PE_SECTIONTEMPLATE, and binds into it the six bind values. These values must occur in the order that they were specified in the HTML object. The variable *&HTMLBody* is listed fifth because it is the fifth bind variable.

   Example:

```
rem;
rem    Build The Web Page;
rem;
&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1,
 IScript_GetImageFileSpec("PWSA19OE85C"), &HTMLNav2, &HTMLSectionImg, &HTMLBod⇒

y,
 &HTMLFooter);
```

9. Section the template within the portal.

10. Repeat the process and bind additional cells within the HTML object section template.

    For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values.

See *PeopleTools: Application Designer Developer's Guide* for more information about constructing a template for a Web magazine section.

Related Links

Understanding Web Magazine iScripts

Displaying Articles

Use the article page layout to display an article within the publication. You have the freedom to arrange this page as desired. In the following illustration, the article is shown with a title and a side navigation bar that shows all the articles within this section.

This example illustrates an article page.

To construct a template for a Web magazine article:

1. Design the template in HTML.

   Before creating a template, decide on the page design and break it up into table cells.

   Code example:

```
<HTML>
<HEAD>
<TITLE> PeopleTalk: Home Page </TITLE>
<meta name="keyword" content="PSA  Professional Services Automation">
<style type="text/css">

A:HOVER {
   font-family : Arial, Helvetica, sans-serif;
   color: #FF0000;
   text-decoration: none;
}

A:LINK {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
   text-decoration: none;
}

A:VISITED {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
   text-decoration: none;
}

A:HOVER.leftnavlink {
   font-family : Arial, Helvetica, sans-serif;
   color: #FF0000;
```

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```
   text-decoration: none;
}

A:LINK.leftnavlink {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
   text-decoration: none;
}

A:VISITED.leftnavlink {
   font-family : Arial, Helvetica, sans-serif;
   color: #0000FF;
}

.bodytext {
   font-family : Arial, Helvetica, sans-serif;
   font-size : 10pt;
   color : #000000;
   background-color : #FFFFFF;
}

.blocktext {
   font-family : Arial, Helvetica, sans-serif;
   font-size : 10pt;
   color : #000000;
   background-color : #FFFFFF;
}

</style>
</HEAD>

<BODY>

<TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760">

<!-- Header -->
<TR>
<TD COLSPAN=2>
%BIND(:1)
</TD>
</TR>

<!-- Navigation Bar 1 -->
<TR>
<TD  COLSPAN=2>
%BIND(:2)
</TD>
</TR>

<!-- Navigation Bar 2 -->
<TR>
<TD  COLSPAN=2 BACKGROUND="%BIND(:3)">
%BIND(:4)
</TD>
</TR>

<!-- Category Picture -->
<TR>
<TD WIDTH="140" HEIGHT="130">
%BIND(:5)
</TD>

<!-- Article Title Picture -->
<TD WIDTH="620">
%BIND(:6)
</TD>
</TR>

<!-- Section Articles Navigation Bar -->
<TR>
<TD WIDTH="140" BGCOLOR="#CCFFCC" VALIGN="TOP">
```

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```
%BIND(:7)
</TD>

<!-- Article Body -->
<TD>
        <table width="100%" border="0" cellspacing="0" cellpadding="8">
        <tr>
        <td class="bodytext">
        %BIND(:8)
        </td>
        </tr>
        </table>
</TD>
</TR>

<!-- Footer -->
<TR>
<TD  COLSPAN=2>
%BIND(:9)
</TD>
</TR>

</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools.
3. Add the appropriate BIND parameters to each cell in the HTML object for your template.
4. Save the HTML object in PeopleTools.
5. Open the record WEBLIB_WEBPUB in PeopleTools.
6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   Edit this PeopleCode to suit your needs.
7. Call functions to get the values for the bind variables.
   a. Under the function **IScript_ArticleTemplate**, add the appropriate functions to bind values to the values you have set up in your HTML object (the article template).

      In our example, we will bind a value to the fifth bind variable. The fifth cell in the article template represents the category image. The function **IScript_GetCategoryImg** is delivered with Web Magazine to get the category image.
   b. From the PeopleCode in **IScript_ArticleTemplate**, call the function *IScript_GetCategoryImg* and set it to a string variable.

      In our example, set the return value of the function to the variable *&HTMLCategoryImage*.

      Example:

      ```
      rem;
      rem    Category Image;
      rem;
      &HTMLCategoryImage = IScript_GetCategoryImg();
      ```
8. Bind function values to the HTML object (article template).

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Bind *&HTMLCategoryImage* into the HTML object (article template) using the function **GetHTMLText**.

This function takes our HTML object (article template), which was saved as EO_PE_ARTICLETEMPLATE, and binds into it the bind values. These values must occur in the order in which they were specified in the HTML object. The variable *&HTMLCategoryImage* is listed fourth because it is the fourth bind variable.

Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1,
 IScript_GetImageFileSpec("PWSA19OE
85C"), &HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody,
 &HTMLFooter);
```

9. Register Article Template within the portal.

10. Repeat the process and bind additional cells within the HTML object (article template).

    For each bind value, you can add a function, another HTML object, or static text/images. Continue until all the cells of the HTML object have values. When you finish, the page should look like the PeopleTalk page shown in the previous illustration.

See *PeopleTools: Application Designer Developer's Guide* for information about designing template.

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Chapter 13

iScripts Used to Assemble and Present Web Magazines

Understanding Web Magazine iScripts

Before you design a publication, you must understand how the portal assembles the Web Magazine for presentation in the portal. PeopleSoft Interaction hub delivers a set of page layouts in the form of HTML objects, including built-in functions that use those HTML objects. Configuring or creating new HTML objects requires that you revise the built-in functions.

In the sections that follow, these typographical conventions distinguish the various elements of the PeopleCode:

Notation	***Description***
Keyword	Indicates function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Variable	Indicates placeholders for arguments that your program must supply.
...	Indicates that the preceding item or series can be repeated any number of times.
{Option1|Option2}	Indicates a choice between options.
[ ]	Indicates optional items.
&Parameter	Indicates that the parameter is an already instantiated object.

Publication

This section discusses:

- IScript_BuildPubHeader
- IScript_BuildPubNavBar
- IScript_BuildPubFooter

- IScript_WebPublishing

IScript_BuildPubHeader

Syntax

IScript_BuildPubHeader()

Description

IScript_BuildPubHeader displays the web magazine header for a publication. It uses the publication ID and the issue ID that are passed through the query string. This function then retrieves the current issue name using these parameters and displays it in the header. It's displayed by passing the issue name as a bind variable to the HTML Header Template. Different publications must change the code to call their specific HTML templates for the header.

The declaration is:

```
Declare Function IScript_BuildPubHeader PeopleCode WEBLIB_WEBPUB.EO_PE_PUB Fiel
dFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication*.
ISSUE	The issue ID is set in the query string by `ISSUE=`*`Issue ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.

This table lists Other Parameters:

Parameter	***Description***
HTML.*HTML Template*	This HTML template is required to display the header for the Web Magazine page. Change this in the code to use the HTML template that you designed.

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Returns

Returns the HTML markup for the entire publication or issue header.

Example

```
&HTMLHeader = IScript_BuildPubHeader();
```

IScript_BuildPubNavBar

Syntax

IScript_BuildPubNavBar()

Description

IScript_BuildPubNavBar displays the Web magazine navigation bar for a publication. This function retrieves the HTML template for the navigation bar for the publication. The inputs are publication, issue name, and full URL from the %Request parameter. Different publications must change the code to call their specific HTML templates for the navigation bar.

The declaration is:

```
Declare Function IScript_BuildPubNavBar PeopleCode WEBLIB_WEBPUB.EO_PE_PUB Fiel
dFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
ISSUE	The issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue.*

This table lists Other Parameter:

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Parameter	*Description*
HTML. *HTML Template*	This HTML template is required to display the publication navigation bar for the Web Magazine page. Change this in the code to use the HTML template that you designed.
URL	This is the URL from the %Request. This must be an absolute URL, in the following format: `Scheme://host:port/path/` For example: `http://localhost:8080/servlets/iclientservlet/HR` **Note:** HR is a subdirectory.

Returns

Returns the HTML markup for the entire publication navigation bar.

Example

```
&HTMLNav1 = IScript_BuildPubNavBar();
```

IScript_BuildPubFooter

Syntax

```
IScript_BuildPubFooter()
```

Description

IScript_BuildPubFooter displays the Web magazine footer for publication. It retrieves the HTML template of the footer for that publication. This is a static HTML template that does not have any bind variables. For different publications, the code must be changed to call the specific HTML template for the footer.

The declaration is:

```
Declare Function IScript_BuildPubFooter PeopleCode WEBLIB_WEBPUB.EO_PE_PUB Fiel
dFormula;
```

Parameters

Function Call Parameters: *None.*

Query String Parameters: *None.*

This table lists the Other Parameters:

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Parameter	*Description*
HTML. *HTML Template*	This HTML template is required to display the footer for the Web Magazine page. Change this in the code to use the HTML template that you designed.

Returns

Returns the HTML markup for the entire publication footer.

Example

```
&HTMLFooter = IScript_BuildPubFooter();
```

IScript_WebPublishing

Syntax

```
GenerateScriptPortalURL(%Portal, %Node ,  Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLAT⇒
ES, "FieldFormula", "IScript_WebPublishing");
```

GenerateScriptPortalURL can be used with this function as part of the syntax, but generally the syntax for this iScript is the following:

```
IScript_WebPublishing()
```

Description

IScript_WebPublishing assembles the Web magazine for a publication issue. It uses the publication built-in functions iScripts described previously to produce each value that is required by the cover page template. It is assembled by passing all required parameters as bind variables to the HTML Front Page template.

Customized cover page layouts require changes to the code. For example, if the HTML template has six bind variables; IScript_WebPublishing must pass six values, including HTML markup returned by other publication built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GenerateHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1,
 &CompanyNews, &Indu
stryFocus, &HMLFooter, &ArticleURL, &SectionURL,
IScript_GetImage("PWSH507PO8C"), IScript_GetImage("PWSEP6SXO8C")
IScript_GetImage("PWSPS3TQO8C"), IScript_GetImage("PWS4MT7QO8C"),
IScript_GetImage("PWSTRUTPO8C"), IScript_GetImage("PWSPB7CPO8C"),
IScript_GetImage("PWSYBONQO8C"), IScript_GetImage("PWS5JA6S59C"),
IScript_GetImage("PWS24J8F44C"));
```

where:

- EO_PE_FRONTPAGETEMPLATE is the cover page layout.
- &HTMLHeader, &HTMLNav1, and &HTMLFooter contain the HTML markup for the header, navigation, and footer portions of the layout.

- &CompanyNews contains the HTML markup for articles for the news section.
- &IndustryFocus contains the HTML markup for articles for the industry section.
- &articleURL is the portal content URL for article template pages.
- &sectionURL is the portal content URL for section template pages.
- IScript_GetImage() calls are used to build HTML IMG tags for graphics on the page.

Returns

Returns the HTML markup for the entire publication issue.

Example

```
<a href=http://host:port/psp/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_
WebPublishing?PUB=PEOPLETALK&ISSUE=JUNAUG2000>PeopleTalk</a>
```

Section

All articles for an issue are retrieved. All sections where the articles belong are sorted.

This section discusses:

- IScript_BuildSectionNavBar
- IScript_GetSectionArticles
- IScript_GetSectionImg
- IScript_SectionArticleTemplate

IScript_BuildSectionNavBar

Syntax

```
IScript_BuildSectionNavBar()
```

Description

IScript_BuildSectionNavBar builds the section navigation bar for a publication issue. The navigation bar displays all of the sections for a publication issue. It is created with the images that are defined in the section navigation (on and off) images of the application.

If the current section is referenced, the Section Navigation Bar On image is used. If the section referenced is not the current section, the Section Navigation Bar Off image is used.

The declaration is:

```
Declare Function IScript_BuildSectionNavBar PeopleCode WEBLIB_WEBPUB.EO_E_SECT
```

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```
ION FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
ISSUE	The issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*

Returns

Returns the HML markup for the entire section navigation bar.

Example

```
&HTMLNav2 = IScript_BuildSectionNavBar();
```

IScript_GetSectionArticles

Syntax

```
IScript_GetSectionArticles(&NumberOfColumns, &Fontsize, &Se ctionOn, &CategoriesOn,⇒

 &ArticlesSummaryOn, &More, &Section)
```

Description

IScript_GetSectionArticles displays all articles for a section of a publication issue. All articles are displayed; they use the parameters that are listed in the following table. The output of the articles can be changed.

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Features include the number of columns in which the articles are displayed in, font size, section titles (on or off), category titles (on or off), article summaries (on or off), more articles link (on or off), and a section ID override.

The declaration is:

```
Declare Function IScript_GetSectionArticles PeopleCode WEBLIB_WEBPUB.EO_PE_SEC
TION FieldFormula;
```

Parameters

This table lists the Function Call Parameters:

Parameter	***Description***
NumberOfColumns	(Integer) Number of columns in which to display the articles. If this value is 3, three columns display the articles.
Fontsize	(Integer) Relative font size in which the output is displayed.
SectionOn	(Integer) If this value is 1 (true), the section name is displayed at the beginning of the article listing. If this value is 0 (false), the section name is not displayed.
CategoriesOn	(Integer) If this value is 1 (true), the category name is displayed at the beginning of each article. If the value is 0 (false), the category name is not displayed.
ArticleSummaryOn	(Integer) If this value is 1 (true), the article summary is displayed after the article title. If the value is 0 (false), the article summary is not displayed.
More	(Integer) If this value is 1 (true) and there are more than three articles, *More...* appears at the end of the article listing. If the value is 0 (false), the link does not appear.
Section	If a value exists, it overrides the query string parameter value for the section ID. This is useful if there is no query string parameter for the section ID. This value must be the section ID.

This table lists the Query Sting Parameters:

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Parameter	*Description*
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
ISSUE	The issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*

Returns

Returns the HTML markup for all articles in a section for a publication or an issue.

Example

```
rem Get the Articles for the news section;
rem Parameters Values for the Function Call;
rem Number of Columns - 1;
rem Font Size - 2;
rem Section Title On - 0 (False);
rem Category Title On - 0 (False);
rem Article Summary On - 1 (True);
rem More... link - 0 (False);
rem Section Name - "" (current section);
&HTMLText = IScript_GetSectionArticles(1, 2, 0, 0, 1, 0, " ");
```

IScript_GetSectionImg

Syntax

`IScript_GetSectionImg``()`

Description

IScript_GetSectionImg retrieves the section image for a section of a publication. It accepts inputs from the query string for the publication ID and the section ID. IScript_GetSectionImg first retrieves the section image ID. Using this ID, it calls the IScript_GetImage function to retrieve the image information.

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The declaration is:

```
Declare Function IScript_GetSectionImg PeopleCode WEBLIB_WEBPUB.EO_PE_SECTION F
ieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*

Returns

Returns the HTML image tag for the section image.

Example

```
&HTMLSectionImg = IScript_GetSectionImg();
```

IScript_SectionArticleTemplate

Syntax

```
GetScriptContentURL(%Portal, %Node, Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLATES, "F⇒
ieldFormula", "IScript_SectionArticleTemplate");
```

GenerateScriptPortalURL can be used with this function as part of the syntax, but generally the syntax for this iScript is the following:

`IScript_SectionArticleTemplate`

Description

IScript_SectionArticleTemplate assembles the section page for a publication issue. It uses the section built-in functions iScripts described previously to come up with each value that is required by the section

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page template. Passing all required parameters as bind variables, to the HTML Section Page template, assembles it.

Changes to the code are required when customizing section page layouts. For example, if the HTML template has six bind variables, IScript_SectionArticleTemplate must pass six values, including HTML markup returned by other section built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1,
 IScript_GetImageFileSpec("
PWSA19OE85C"), &HTMLNav2, &HTMLSectionImg, &HTMLBody, &HTMLFooter);
```

where:

- EO_PE_SECTIONTEMPLATE is the section page layout.
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and &HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portions of the layout.
- &HTMLSectionImg contains the HTML markup for the section image; &HTMLBody contains the HTML markup for all articles for the current section.
- IScript_GetImageFileSpec() calls are used to retrieve the image file path and file name from the database.

Note: If you have a different page layout for every section in a publication, you must edit IScript_SectionArticleTemplate to use the appropriate HTML object (section layout), depending on the publication section.

Parameters

None.

Returns

Returns the HTML markup for a section in a publication issue.

Example

```
<a href="http://jwegrzyn070500/psc/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_SectionArticleTemplate?PUB=PEOPLETALK&ISSUE=
JUNAUG2000&SECTION=NEWS">News</a>
```

Category

This section discusses:

- IScript_GetCategoryLongName
- IScript_GetCategoryImg

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IScript_GetCategoryLongName

Syntax

```
IScript_GetCategoryLongName()
```

Description

IScript_GetCategoryLongName retrieves the category long name for a category in a section of a publication. It accepts inputs from the query string for the publication ID, section ID, and category ID.

The declaration is:

```
Declare Function IScript_GetCategoryLongName PeopleCode WEBLIB_WEBPUB.EO_PE_
CATEGORY FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*
CATEGORY	The category ID is set in the query string by `CATEGORY=`*`Category ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Category.*

Returns

Returns the category long name.

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IScript_GetCategoryImg

Syntax

`IScript_GetCategoryImg``()`

Description

IScript_GetCategoryImg retrieves the category image for a category in a section of a publication. It accepts inputs from the query string for the publication ID, section ID, and category ID. IScript_GetCategoryImg first retrieves the category image ID. Using this ID, it calls the IScript_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetCategoryImg PeopleCode WEBLIB_WEBPUB.EO_PE_CATEGORY
 FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*
CATEGORY	The category ID is set in the query string by `CATEGORY=`*`Category ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Category.*

Returns

Returns the HTML image tag for the category image.

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Article

This section discusses:

- IScript_GetArticleTitle
- IScript_GetArticleTitleImage
- IScript_GetArticleSubTitle
- IScript_GetArticleBody
- IScript_GetArticleImage
- IScript_GetArticleAuthor
- IScript_ArticleTemplate

IScript_GetArticleTitle

Syntax

IScript_GetArticleTitle()

Description

IScript_GetArticleTitle retrieves the article title for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function IScript_GetArticleTitle PeopleCode
WEBLIB_WEBPUB.EO_PE_ARTICLE FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*

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Parameter	*Description*
ISSUE	The issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue.*
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article.*

Returns

Returns the article title.

IScript_GetArticleTitleImage

Syntax

`IScript_GetArticleTitleImage``()`

Description

IScriptGetArticleTitleImage retrieves the article title image for an article in an issue of a publication. It retrieves inputs from the query string for the publication ID, issue ID, and article ID. IScript_GetArticleTitleImage first retrieves the article title image ID. Using this ID, it calls the IScript_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetArticleTitleImage PeopleCode WEBLIB_WEBPUB.EO_PE_
ARTICLE FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication.*
SECTION	The section ID is set in the query string by `SECTION=`*`Section ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Section.*
CATEGORY	The category ID is set in the query string by `CATEGORY=`*`Category ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Category.*
ISSUE	The Issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article*.

Returns

Returns the HTML image tag for the article title image.

IScript_GetArticleSubTitle

Syntax

`IScript_GetArticleSubTitle``()`

Description

IScript_GetArticleSubTitle retrieves the article subtitle for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

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The declaration is:

```
Declare Function IScript_GetArticleSubTitle PeopleCode WEBLIB_WEBPUB.EO_PE_ART
ICLE FieldFormula;
```

Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication*.
ISSUE	The Issue ID is set in the query string by `ISSUE=`*`Issue ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article*.

Returns

Returns the article subtitle.

IScript_GetArticleBody

Syntax

`IScript_GetArticleBody``()`

Description

IScript_GetArticleBody retrieves the article body text for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function IScript_GetArticleBody PeopleCode WEBLIB_WEBPUB.EO_PE_ARTICLE
 FieldFormula;
```


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Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication*.
ISSUE	The Issue ID is set in the query string by `ISSUE=`*`Issue ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article*.

Returns

Returns the article body text.

IScript_GetArticleImage

Syntax

`IScript_GetArticleImage``()`

Description

IScript_GetArticleImage retrieves the article image for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID. IScript_GetArticleImage retrieves the article image ID. Using this ID, it calls the IScript_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetArticleImage PeopleCode WEBLIB_WEBPUB.EO_PE_ARTICLE
 FieldFormula;
```

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Parameters

Function Call Parameters: *None.*

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication*.
ISSUE	The Issue ID is set in the query string by `ISSUE=`*`Issue ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*`.` The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article*.

Returns

Returns the HTML image tag for the article image.

IScript_GetArticleAuthor

Syntax

`IScript_GetArticleAuthor``()`

Description

IScript_GetArticleAuthor retrieves the article author for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function IScript_GetArticleAuthor PeopleCode WEBLIB_WEBPUB.EO_PE_ARTILE
 FieldFormula;
```

Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

Parameter	***Description***
PUB	The publication ID is set in the query string by `PUB=`*`Publication ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Publication*.
ISSUE	The Issue ID is set in the query string by `ISSUE=`*`Issue ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Issue*.
ARTICLE	The article ID is set in the query string by `ARTICLE=`*`Article ID`*. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable *&Article*.

Returns

Returns the article author.

IScript_ArticleTemplate

Syntax

```
GetScriptContentURL(%Portal, %Node, Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLATES,  "⇒

FieldFormula", "IScript_ArticleTemplate");
```

Same comments as above.

Description

IScript_Article_Template assembles the article page for a section of a publication issue. It uses the article built-in functions described previously to produce each value that is required by the article page template. Passing all required parameters as bind variables to the HTML Article Page template assembles it.

Customized article page layouts require changes to the code. For example, if the HTML template has eight bind variables, IScript_GetArticleTemplate must pass eight values, including HTML markup returned by other page built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1,
 IScript_GetImageFileSpec("
PWSA19OE85C"), &HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody,
 &HTMLFooter);
```

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where:

- EO_PE_ARTICLETEMPLATE is the article page layout.
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portions of the layout.
- &HTMLNav3 is the side navigation bar that lists articles for the current section.
- &HTMLCategoryImage contains the HTML markup for the category image.
- &HTMLTitle is the article title image.
- &HTMLBody contains the HTML markup of the article image, text, and author.
- IScript_GetImageFileSpec() calls are used to retrieve the image file path and file name from the database.

Returns

Returns the HTML markup for an article in a section of a publication issue.

Example

```
<a href="http://jwegrzyn070500/psc/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_ArticleTemplate?PUB=PEOPLETALK&ISSUE=
JUNAUG2000&SECTION=INDUSTRY&CATEGORY=COMMUNICATE&ARTICLE=COSPRINGS">Article
 Title</a>
```

Image

This section discusses:

- IScript_GetImage
- IScript_GetImageFileSpec

IScript_GetImage

Syntax

```
IScript_GetImage(&ImageID)
```

Description

IScript_GetImage retrieves the image tag for an image ID. The image ID is retrieved, and all of the parameters surrounding the image are placed in the image tag.

The declaration is:

```
Declare Function IScript_GetImage PeopleCode WEBLIB_WEBPUB.EO_PE_IMAGE Field
Formula;
```

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Parameters

Function Call Parameters:

Parameter	***Description***
ImageID	Specify the image ID for the image that you want to retrieve.

Query String Parameters: *None.*

Returns

Returns the HTML image tag.

IScript_GetImageFileSpec

Syntax

`IScript_GetImageFileSpec``(`*`ImageID`*`)`

Description

IScript_GetImageFileSpec retrieves the file path and file name for an image ID. The image ID is retrieved, and the path and file name are concatenated.

The declaration is:

```
Declare Function IScript_GetImageFileSpec PeopleCode WEBLIB_WEBPUB.EO_PE_IMAGE
 FieldFormula;
```

Parameters

This table lists the Function Call Parameters:

Parameter	***Description***
ImageID	Specify the image ID for the image that you want to retrieve.

Query String Parameters: *None.*

Returns

Returns the concatenated file path and file name.

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Chapter 14

Understanding Content Management Tables

All Content Management Features

The following tables are used by all features. Related language records are also available.

Folder Tables

The following tables pertain to folders:

Table	***Description***	***Notes***
EPPCM_CATEGORY	Folders.	Not applicable.
EPPCM_CATG_TYPE	Folder types. Different folder types allow for different rules regarding how the components render and are used.	Valid folder types are: • *B:* Categorized Content. • *C:* Related information. • *D:* Discussion forum. • *E:* Collaborative workspace. • *N:* News publications. • *R:* Managed content. • *S:* Menu items. • *T:* Manage navigation. • *W:* Pagelet wizard. • *A:* Action items. • *L:* Calendar events.
EPPCM_CATG_CONT	Folder content relationship.	Not applicable.
EPPCM_CATG_SITE	Folder type by site.	Overrides a select set of values by site for the feature.
EPPCM_CONT_SITE	Content type by site.	Overrides by site the available content types to add.

Table	*Description*	*Notes*
EPPCM_COMP_TYPE	Folder type components.	Associates the feature or component type to the menu, component, and page. It also sets the page display values for that feature or component type.
EPPCM_CONT_TYPE	Content type available by feature and component type.	Lists available content types that can be added to the given feature on the given component type.
EPPCM_DFLT_URL	Default URL used to locate file storage location.	Not applicable.
EPPCM_CATG_MEM	Folder member assignment.	Related: PSOPRDEFN and PSROLEDEFN. Implements row-level security for folder content.
EPPCM_CATG_VWR	Folder viewer assignment.	Viewer roles for published content within the folder.
EPPCM_CONT_VWR	Content viewer assignment.	Viewer roles for published content.
EPPCM_CATG_ATTR	Folder attributes.	Not applicable.
EPPCM_TPCATGADM	Top administrator assignments by feature.	Not applicable.
EPPCM_PRIVILEGE	Privilege set definition for the feature.	Determines actions available to the user. The defined privilege set is stored in the EPPCM_CATG_MEM table, which implements row-level security for folder content.
EO_PE_OPTIONS	Holds the next available category or content ID.	***Warning!*** These IDs are system-assigned and consequently make moving Content Management-related categories and content from one database to another ill advised.

Content Tables

The following tables pertain to content:

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Table Name	***Description***	***Comments***
EPPCM_CONTENT	Parent content record, general metadata.	Contains content type indicator.
EPPCM_DOC	Content version details with the content and version ID.	Not applicable.
EPPCM_CONT_ATTR	Content attributes.	Not applicable.
EPPCM_SUBSCRIBR	Subscribe to content privilege is set.	Users with the subscribe privilege can add or delete Managed Content members as interested parties.
EPPCM_IMAGE	Content version details with the content and version ID.	Used only by the Managed Content feature.
EPPCM_IMAGEUPL	Content image upload.	Not applicable.
EPPCM_HTMLTEXT	Content version details with the content and version ID.	Not applicable.
EPPCM_URL	Content version details with the content and version ID.	Not applicable.
EPPCM_CREF	Content version details with the content and version ID.	Used for the Menu Item content type.
EPPCM_DOCINDB	BLOB record.	Repository for documents that are stored in the database instead of on an FTP file server.

Categorized Content

The following table lists the additional tables required by categorized content:

Table	***Description***	***Notes***
EPPCM_CATG_ATTR	Folder attributes, such as manual or automatically created.	Not applicable.
EPPCM_CONT_ATTR	Content attributes, such as manual versus auto-created.	Not applicable.

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Table	***Description***	***Notes***
PS_EPPCM_SPIDR_AET	Run control state for the Content Categorization Spider application engine.	Not applicable.
PS_EPPCM_SPIDR_IDS	Content categorization spider application engine program content ID work table.	Not applicable.
PS_EPPCM_SPIDR_LGS	Content categorization spider application engine program search index languages.	Not applicable.
PS_EPPCM_SPIDR_RUN	Content categorization spider run control table.	Not applicable.
PS_EPPCM_SPIDR_DTL	Folder spider properties, such as folder mappings.	Not applicable.

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Chapter 15

Using Integration Broker for Content Migration

Verifying Service Operation and Adding Routing for REQUEST Message in the Source Database

To verify service operation and add routing for REQUEST message in the source database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open the service operation *EPPCM_MIG_RQST.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message.Version	*EPPCM_MIG_RQST.VERSION_1*
Queue Name	*EPPCM_MIGRATE_CONTENT*

4. Click the **Service Operation Security** link.
5. Verify the permission list PAPP2050 is set to *Full Access.*
6. Select the Routings tab and add a row for an Outbound routing from the source node to the target node.

Verifying Service Operation, Routing, and Handler for REQUEST Message in the Target Database

To verify service operation, routing, and handler for REQUEST message in the target database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open the service operation *EPPCM_MIG_RQST.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message.Version	*EPPCM_MIG_RQST.VERSION_1*
Queue Name	*EPPCM_MIGRATE_CONTENT*

4. Click the **Service Operation Security** link.
5. Verify the permissions list PAPP2050 is set to *Full Access.*
6. Select the Handlers tab and verify a row with the following values:

Field	***Value***
Name	*RequestHandler*
Type	*OnNotify*
Implementation	*Application Class*

7. Click the **Details** link and verify the application class with the following values:

Field	***Value***
Package Name	*EPPCM_MIG_RQST*
Path	**:**
Class ID	*RequestHandler*
Method	*OnNotify*

8. Select the Routings tab and add an Inbound routing from the source node to the target node, if none exists.

Verifying Service Operation and Adding Routing for RESPONSE Message in the Target Database

To verify service operation and add routing for RESPONSE message in the target database:

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1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open service operation *EPPCM_MIG_RESP.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message.Version	*EPPCM_MIG_RESP.VERSION_1*
Queue Name	*EPPCM_MIGRATE_CONTENT*

4. Click the **Service Operation Security** link.
5. Verify the permission list PAPP2050 is set to *Full Access.*
6. Select the Routings tab and add a row for an Outbound routing from the target node to the source node.

Verifying Service Operation, Routing, and Handler for RESPONSE Message in the Source Database

To verify service operation, routing, and handler for RESPONSE message in the source database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open the service *EPPCM_MIG_RESP.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message.Version	*EPPCM_MIG_RESP.VERSION_1*
Queue Name	*EPPCM_MIGRATE_CONTENT*

4. Click the **Service Operation Security** link.
5. Verify the permission list PAPP2050 is set to *Full Access.*
6. Select the Handlers tab and verify a row with the following values:

Field	***Value***
Name	*RequestHandler*
Type	*OnNotify*
Implementation	*Application Class*

7. Click the **Details** link and verify the application class with the following values:

Field	***Value***
Package Name	*EPPCM_MIG_RESP*
Path	**:**
Class ID	*RequestHandler*
Method	*OnNotify*

8. Select the Routings tab and add an Inbound routing from the target node to the source node, if none exists

Verifying Service Operation and Adding Routing for PREVIEW Message in the Source Database

To verify service operation and add routing for PREVIEW message in the source database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open the service operation *EPPCM_MIG_PREVIEW_SYNC.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message Version (of the Request type)	*EPPCM_MIG_PREVIEW_SYNC.VERSION_1*
Message Version (of the Response type)	*EPPCM_MIG_PREVIEW_SYNC.VERSION_1*

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4. Click the **Service Operation Security** link.
5. Verify the permission list PAPP2050 is set to *Full Access.*
6. Select the Routings tab and add an active Outbound routing from the source node to the target node.

Verifying Service Operation, Routing, and Handler for PREVIEW Message in the Target Database

To verify service operation, routing, and handler for PREVIEW message in the target database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**
2. Open the service operation *EPPCM_MIG_PREVIEW_SYNC.*
3. In the General page, verify the service operation with the following values:

Field	***Value***
Active	<Selected>
Message.Version (of the Request type)	*EPPCM_MIG_PREVIEW_SYNC.VERSION_1*
Message.Version (of the Response type)	*EPPCM_MIG_PREVIEW_SYNC.VERSION_1*

4. Click the **Service Operation Security** link.
5. Verify the permission list PAPP2050 is set to *Full Access.*
6. Select the Handlers tab and verify a row with the following values:

Field	***Value***
Name	*RequestHandler*
Type	*OnRequest*
Implementation	*Application Class*

7. Click the **Details** link and verify the application class with the following values:

Field	***Value***
Package Name	*EPPCM_MIG_PREVIEW_SYNC*

Field	***Value***
Path	**:**
Class ID	*RequestHandler*
Method	*OnRequest*

8. Select the Routings tab and add an active Inbound routing from the source node to the target node.

Setting the Target Node to Segment Aware in the Source Database

Before you can send segmented messages, you must configure the remote node defined on the local system to handle segmented messages by setting the Segment Aware option on the Node Definitions page in the PeopleSoft Pure Internet Architecture.

To set the target node to *Segment Aware* in the source database:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes.**
2. Open the target node.
3. In the Node Definitions page, select the **Segment Aware** option.
4. Save your node definition.

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Chapter 16

Setting Default Approver Role for Content Management

Setting the Default Content Migration Approver Role

To set the default content migration approver role:

1. Select **Portal Administration** > **System Data** > **Installation Options.**
2. Select the Portal and Security Defaults tab.
3. Set the **Approver Role** field to *PAPP_CONTENT_ADMIN*.
4. Save your settings.

Modifying a Default Approver Role

To modify a default approver role:

1. Select **Portal Administration** > **System Data** > **Installation Options.**
2. Select the Portal and Security Defaults tab.
3. Modify the **Approver Role** field as needed.

   For example, modify the approver role from *PAPP_CONTENT_ADMIN* to *PAPP_AUTHORS*.
4. Save your settings.

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