Oracle® Cloud

Managing Assets with Oracle Content Management

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Preface

This document describes how manage content, whether that's digital assets or business documents, in Oracle Content Management repositories.

Audience

This publication is intended for Oracle Content Management enterprise users who want to create and manage digital assets, business documents, and structured content (content items); and content and repository administrators who want to create and manage digital asset repositories, business asset repositories, and their structural building blocks such as asset types, taxonomies, workflows, localization policies, publishing channels, and ranking policies.

Documentation Accessibility

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Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- *What's New for Oracle Content Management*
- *Collaborating on Documents with Oracle Content Management*
- *Administering Oracle Content Management*
- *Building Sites with Oracle Content Management*
- *Developing with Oracle Content Management As a Headless CMS*
- *Integrating and Extending Oracle Content Management*
- *Capturing Content with Oracle Content Management*

- *Known Issues for Oracle Content Management*

Conventions

The following text conventions are used in this document.

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

Part I
Introduction

This part provides conceptual information about Oracle Content Management and using it to manage your content.

- Overview of Oracle Content Management
- Understand Your Content Management Options
- Key Concepts

Video

1 Overview of Oracle Content Management

Whether you need to manage digital assets, publishing to multiple channels in various languages, or oversee business documents gathered from a variety of sources, Oracle Content Management helps you throughout the entire content lifecycle. Create, capture, organize, review, and protect all your content as it flows through your organization with integrated processes and data. Oracle Content Management is a cloud-based content hub, offering scalability, security, and governance, so you can eliminate the typical inefficiencies in content management—including organizing and tagging new content and locating existing documents—and do more with fewer resources.

Using Oracle Content Management for digital asset management, you can rapidly collaborate internally and externally on any device to approve content and create contextualized experiences. Built-in business-friendly tools make building new web experiences with stunning content a breeze. You can drive digital engagement with all your stakeholders using the same content platform and the same processes. Technical and organizational bottlenecks are gone, so you no longer have barriers to create engaging experiences, improving customer and employee engagement.

Using Oracle Content Management for business document management, you have the same collaboration capabilities internally and externally on any device to manage your content. Integrated tools such as content connectors enable you to upload content from third-part cloud storage, and Content Capture makes it easy to *automate* document discovery and capture.

> **Note:**
>
> Oracle Content Management Starter Edition has a limited feature set. To take advantage of the full feature set, upgrade to the Premium Edition.

Access Oracle Content Management

After you've been granted access to Oracle Content Management, you receive a welcome email with details about the instance URL and your user name. You'll need this information to log in to the service, so it's a good idea to keep it for future reference.

There are different ways to interact with Oracle Content Management:

- The web interface provides easy access from your favorite web browser. You can manage your content in the cloud, share files and folders with others, start and participate in conversations, create websites (if allowed), and more.
- The desktop app lets you keep your files and folders synchronized between the cloud and your computer. You can sync your own files and those shared with you, making sure you always have access to the latest versions.
- A Microsoft Office add-on gives you access to Oracle Content Management features directly from Microsoft Word, Excel, PowerPoint, and Outlook.

- Mobile apps for Android and iOS provide easy access on your phone or other mobile devices. The mobile apps are instantly familiar, because they look and act just like the service in your web browser. You can access your cloud content, search and sort your files and folders, share content, and work with conversations.
- REST APIs and SDKs provide developers with powerful tools to programmatically incorporate Oracle Content Management functionality into web applications and mobile apps.

Understand Roles

The Oracle Content Management features that you can access depend on the role you've been assigned. You'll see different options depending on your application role. Standard users can work with documents, conversations, and sites. Enterprise users can also access assets. Developers see options to build and customize website pieces such as templates, themes, components, and layouts. Administrators see options to configure the service, integrate the service with other business applications, and set up asset repositories.

There are different types of roles in Oracle Content Management:

- **Organization roles** — Your role within your organization determines what tasks you need to perform and how you use features.
- **Application roles** — Application roles control what features you see in Oracle Content Management.
- **Resource roles** (permissions) — What you can see and do with a resource, such as a document, content item, site, or template, depends on the role you're assigned when the resource is shared with you.

Learn more...

Manage Assets

Oracle Content Management offers enterprise users powerful capabilities to manage all your assets whether you need to manage digital assets, publishing to multiple channels in various languages, or oversee business documents gathered from a variety of sources. It provides a central content hub for all your assets, where you can organize them into repositories and collections, and create rules to define how they can be used and where.

There are also extensive management and workflow features to guide assets through their creation and approval process and to ensure that only authorized versions are available for use.

It's easy to tag and filter assets so you can quickly find the assets you need. And smart content features will tag and suggest assets automatically as you use them!

Create asset types to define what information you need to collect when users create assets. *Digital asset types* define the custom attributes required for your digital assets (files, images, and videos) and business documents. *Content types* group different pieces of content into reusable units. Users can then create digital assets, business documents, and content items based on these asset types for consistent use.

Learn more...

Collaborate on Documents

With Oracle Content Management, you can manage your content in the cloud, all in one place and accessible from anywhere.

You can group your files in folders and perform common file management operations (copy, move, delete, and so on) in much the same way as on your local computer. And since all your files reside in the cloud, you have access to them wherever you go, also on your mobile devices. If you install the desktop app, all your content can be automatically synchronized to your local computer, so you always have the most recent versions at your fingertips.

After you get all your content in the cloud, it’s easy to share your files or folders to collaborate with others inside or outside your organization. Everyone you share your content with has access to the latest information—wherever they are, whenever they need it. You can grant access to entire folders or provide links to specific items. All access to shared items is recorded, so you can monitor how and when each shared item was accessed.

Conversations in Oracle Content Management allow you to collaborate with other people by discussing topics and posting comments in real time. You can start a stand-alone conversation on any topic, adding files as needed. Or you can start a conversation about a specific file, folder, asset, or site for quick and easy feedback.

All messages, files, and annotations associated with a conversation are retained, so it’s easy to track and review the discussion. And your conversations live in the cloud, so you can also view them and participate on the go from your mobile devices.

Learn more...

Build Sites

With Oracle Content Management, you can rapidly build and publish marketing and community websites—from concept to launch—to provide engaging online experiences. The process is completely integrated: content, collaboration, and creativity are combined in a single authoring and publishing environment.

To get started quickly, use an out-of-the-box template, drag-and-drop components, sample page layouts, and site themes to assemble a site from predefined building blocks. Or developers can create custom templates, custom themes, or custom components to create unique online experiences.

Add YouTube videos, streaming videos, images, headlines, paragraphs, social media links, and other site objects simply by dragging and dropping components into designated slots on a page. Switch themes and rebrand a site at the touch of a button to provide an optimized, consistent look and feel across your organization.

You can work on one or more updates, preview an update in the site, and then, when you're ready, publish the update with a single click.

In addition to creating and publishing sites in Site Builder, Oracle Content Management also supports 'headless' site development using REST APIs, React JS, Node JS, and other web technologies.

Learn more...

Integrate and Extend Oracle Content Management

As an Oracle Platform-as-a-Service (PaaS) offering, Oracle Content Management works seamlessly with other Oracle Cloud services.

You can embed the web UI into your web applications so users can interact with content directly. Use the Application Integration Framework (AIF) to integrate third-party services and applications into the Oracle Content Management interface through custom actions. Or develop content connectors to bring content that you have already created elsewhere into Oracle Content Management, manage it centrally, and use it in new experiences across multiple channels.

With a rich set of REST APIs and SDKs for content and site management, delivery, and collaboration, you can incorporate Oracle Content Management functionality into your web applications.

Create client applications that interact with your content SDKs and assets in the cloud. Develop custom integrations with collaboration objects or retrieve assets for use wherever you need them. You can access and deliver all your content and assets optimized for each channel, whether it's through a website, content delivery network (CDN), or mobile apps.

Learn more...

Get Started

To help you get started with Oracle Content Management, visit the Oracle Help Center, which has lots of resources, including documentation, videos, guided tours, and developer information.

And if you need it, there's support and a community to help.

2 Understand Your Content Management Options

Oracle Content Management has several different ways to manage your content depending on your needs:

- **Digital Asset Repositories**

  If you manage assets that need to be published for use within digital experiences (websites and other channels) or translated into multiple languages, you'll use a *digital asset repository*. Digital asset repositories can store digital assets (such as images, videos, and files) and content items (structured content such as blogs or press releases). Assets in digital asset repositories can be cached by the embedded CDN for scalable delivery worldwide. You can use built-in review or multi-step workflow processes to approve assets.

  Assets and asset repositories are available only to enterprise users.

- **Business Asset Repositories**

  If you manage business documents (such as invoices, contracts, engineering drawings, or reports), you'll use a *business asset repository*. Business asset repositories can store business documents (any type of file an enterprise needs to manage to run their business), and content items (such as employee, customer, and supplier records). Business asset repositories are designed to ensure document security. Assets in business asset repositories require an authenticated user to access them. In addition, business assets don't support localization. You can use built-in review or multi-step workflow processes to approve assets.

  Assets and asset repositories are available only to enterprise users.

- **Document Collaboration**

  If you just need an simple way for your organization to share files and folders and collaborate with each other, you can use the *Documents* page. Document collaboration allows you to store any type of file in a hierarchical folder structure. These files aren't intended for publication to digital experiences, don't support localization, don't support categorization with taxonomies, and don't support a built-in approval process.

This table compares the features available with each content management option.

Feature	Digital Asset Repositories	Business Asset Repositories	Document Collaboration
Upload content	✓	✓	✓
Download content	✓	✓	✓
Public access to content	✓ [1]		✓ [2]
Custom asset types	✓	✓	
Sync content to desktop			✓
Smart content	✓	✓	
Cross-reference content	✓	✓	
Publish content	✓		
Localize content	✓		
Image renditions	✓		
Recommendations (in Oracle Content Management sites)	✓		
Custom ranking policies	✓		
Analytics	✓	✓	✓
Performance data	✓		

Feature	Digital Asset Repositories	Business Asset Repositories	Document Collaboration
Review and collaboration options	• Basic review • Workflows • Conversations/annotatio	• Basic review • Workflows • Conversations/annotations	• Conversations/annotations

Feature	Digital Asset Repositories	Business Asset Repositories	Document Collaboration
	ns		
Organizational methods	• Repositories • Taxonomies • Collections • Tags	• Repositories • Taxonomies • Collections • Tags	• Folders • Tags

Feature	Digital Asset Repositories	Business Asset Repositories	Document Collaboration
Metadata options	• Attributes (for digital assets) • Fields (for con	• Attributes (for business documents) • Fields (for content items) • Tags	• Tags • Metadata

Feature	Digital Asset Repositories	Business Asset Repositories	Document Collaboration
	•	tentitems) Tags	

[1] Digital asset repositories allow you to publish content to public channels.

[2] Document collaboration allows you to create public links to files and folders.

Understand Digital Asset Repositories

Digital assets are critical for effective customer engagement across touchpoints. Even small organizations might have tens or hundreds of thousands of digital assets in different formats including text, images, videos, or structured content items. Managing these assets effectively means providing business users the right tools to collaboratively create, organize, version, approve, and publish your assets. Let's look at some of the Oracle Content Management features available to manage and publish your assets.

Oracle Content Management allows users to manage digital assets in one or more asset repositories. A repository is a storage location for assets that you need for building web, mobile, or other user experiences in your organization. An asset can be a content item that represents an individual piece of content, such as a blog post, case study, or product information; or a digital asset that represents an image, video, or any other type of media needed to create engaging experiences.

As a repository administrator, you define which asset types can be managed in a particular repository, which defines what asset formats can be stored in the repository and what metadata needs to be associated with each asset. You can assign taxonomies to a repository to allow users to categorize assets, configure workflow roles for approving assets, and define the valid languages to support translation requirements.

Administrators can also assign publishing channels to the repository. This allows business users to preview assets in different channels and devices before approval. Once approved, assets can then be published to one or more customer-facing experiences, where they will be automatically cached with the embedded CDN for scalable delivery worldwide.

You can create multiple repositories to handle your different business needs. For example:

- You could set up one repository to support content publishing to your corporate website. Associate a localization policy with one of the repository's assigned publishing channels to define which languages are required to allow global delivery of the site. To enable content translation by external language service providers, assign translation connectors to the repository. Before publishing assets to your corporate site they need to be reviewed and approved by business owners; facilitate that by assigning relevant workflows to the repository.
- Set up another repository to support managing digital assets for you marketing automation system. Assign digital asset types with custom attributes required to support personalized campaigns. To allow asset categorization for individual products or customers, assign taxonomies that represent your product hierarchy or industries, as applicable for your business. To help contributors categorize assets or simply find relevant digital assets, enable the smart content feature on the repository.
- Your organization may work with external design agencies who create content for marketing campaigns. You could set up a repository for collaboration with these agencies. Assign content connectors for Google Drive, OneDrive, or other third-party content providers, allowing designers to upload digital assets from these external repositories.

Let's use Oracle Blogs as an example to guide you through the setup of an asset repository to allow content contribution to a similar site. Here's the process you could use to create the required dependencies and get your repository set up:

- **Asset Types**

  The core content elements on Oracle Blogs are blog articles, short write-ups about blog authors, images, videos, and PDF files that some articles allow you to download. In Oracle Content Management this content will be represented as assets of one of two types:

  - **Content type** which defines the structure of data that a content item can store. To store information about the blog authors, define an *Author* content type with a text field *Name* for the author's name, a text field *Job Title* for the job title, a media field *Photo* for the author's picture, and a rich-text field *Author Bio* for a short bio. For the blog articles, define an *Article* content type with a text field *Title* for the article's title, a text field *Summary* for the summary that will be displayed on a list of blog articles or on a search results page, a rich-text field *Content* for the article itself, a media field *Cover Image* for the image that is displayed in the article header, and a reference field *Blog Author* to reference to the blog author content item.
  - **Digital asset type** which defines the file media types that a digital asset can store and the structure of attributes (metadata) to describe the asset. Use the out-of-the-box Image, Video, and File types to manage images, videos, and PDF documents for the blog site; or, define custom digital asset types. For example, define an *Author Photo* digital asset type with a text attribute *Attribution* to store the image creator's name, and define a *Blog Document* digital asset type where the media type is

restricted to PDF files, allowing contributors to publish PDF files but not other files such as Microsoft Word documents on the Blog site.

Then assign all these asset types to the repository for the Blogs site, allowing repository members with the Manager or Contributor role to:

– Create content items from the *Author* and *Article* content types.
– Upload photos to create digital assets from the *Author Photo* digital asset type, which can then be referenced in the *Photo* field in content items created from the *Author* content type.
– Upload images or videos as needed to create digital assets from the out-of-the-box *Image* or *Video* digital asset types, which can then be used in content items created from the *Article* content type or other places on the site.
– Upload files in PDF format to create digital assets from the *Blog Document* digital asset type, which can then be linked to blog articles.

Remember, contributors will be limited to uploading only those file types specified in the digital asset types that are associated with the repository.

- **Languages (Localization Policies)**

  If your organization operates globally, published content typically needs to be translated into regional languages. To enable content translation, the repository needs to have required languages assigned to it. You can assign languages directly to repository. However, as a best practice, you should define required and optional languages for key countries or regions via a localization policy. You assign the localization policy to the channel that is used for publishing content to the site, then assign that publishing channel to the repository, and thus the languages defined in the associated localization policy are automatically assigned to the repository.

- **Publishing Channels**

  Publishing channels allow you to make assets managed in a repository available for consumption on a website (or any external application that can use REST API for that). The channel defines publishing rules such as whether assets need to be approved before they're published, whether the published content is public or secure, and, if secure, it can be limited to a subset of people with specific user roles.

  If you use Oracle Content Management to create your Blog site, a publishing channel will be automatically created and assigned to the repository you select for the site. If you use a different technology to create and manage your Blog site or if, for example, you plan to publish some Blog articles to a mobile app or another site, you can create additional publishing channels and then assign them to the repository for the site.

  After you assign publishing channels to the repository, repository members can target and publish assets to these channels, subject to any publishing channel restrictions.

- **Taxonomies**

  Articles on a website, such as a Blog site, are typically organized into categories to help visitors find relevant information by filtering blog posts by an area of interest, product name, or specific area of expertise or knowledge. For example, Oracle Blogs features a Blog Directory that you can use to narrow down published articles to Analytics Advantage Blogs, Developers Blogs, or Netherlands Blogs.

To facilitate filtering and searching on your published site or application, Oracle Content Management enables you to define relevant taxonomies, assign them to the repository, and then use them for asset categorization. You create a taxonomy by defining a vocabulary of business terms, arranged into a hierarchy of categories that represent how content across your organization is defined and classified. For example, you could define taxonomies for your products, industries, and geographical regions where your organization operates, or any other hierarchy of subject categories that is relevant for your organization.

After you assign taxonomies to a repository, repository members can categorize assets, either when adding them to the repository or at a later time. A faceted search user interface allows filtering assets by categories in one taxonomy or across several taxonomies to find relevant content. You can publish the taxonomy to make categorization information available on assets that are published to the same channel, thus you can leverage the taxonomy to support asset filtering and search on your published website or application.

- **Repositories**

  After your asset types, localization policies, publishing channels, and taxonomies are defined, create the repository and associate the objects you created with the repository.

That completes basic set-up. At this point, your repository is ready for use. Optionally, you can enable additional capabilities on your repository to provide contributors with tools that make content authoring more efficient or to allow you, as repository manager, to govern the content before it's made publicly available on a website:

- **Translation Connectors**

  By default, Oracle Content Management provides the ability to manually translate content into required languages—you can add new language to a single asset at a time or export assets in bulk as a ZIP file with text strings extracted for translation. If your organization uses an external vendor, like Lingotek, Lionbridge, or SDL for content translation, you can register the relevant translation connector with Oracle Content Management, and then assign the translation connector to the repository, so that contributors can easily submit assets for translation by the external vendor.

- **Content Connectors**

  If your organization uses external cloud storage services like Dropbox, Google Drive, or Microsoft OneDrive for sharing digital assets with external design agencies, you can register a content connector for the relevant storage service with Oracle Content Management, and then assign the content connector to the repository, so that contributors can easily add files to the repository directly from the external cloud storage.

- **Smart Content**

  You can help contributors find relevant images in search, add relevant images to content items, or categorize assets with taxonomies by enabling the Smart Content feature on a repository. When you do so, all images added to the repository and all content items created in the repository are processed by built-in artificial intelligence and natural language processing services, auto-tagging them accordingly and extracting keywords from the text.

- **Workflows**

  Typically content requires review and approval by peers or managers before being published. You can enable such governance in your repository by making sure that all publishing channels assigned to the repository are set to **Only approved items can be published**.

By default, Oracle Content Management enables contributors to submit assets for review by repository managers.

If your organization requires content to be reviewed in a multi-step workflow by piers, technical editors, managers, compliance, or your legal team, you can register your Oracle Integration processes with Oracle Content Management, and then assign them to a repository. Then contributors can submit assets for review through a relevant workflow. Workflow participants receive notification when a task is assigned to them and can take actions on the assets as per the role that is assigned to them in the workflow.

- **Audience Attributes**

  Recommendations are a way to provide personalized experiences for website visitors by showing assets based on location or areas of interest. *Audience attributes* are what recommendations use to find and display that personalized content. They can include things like viewer location, the date a viewer is visiting the site, or what products interest a viewer.

  For example, when a viewer in California visits a site with recommended content, they may be shown upcoming events in Los Angeles about cloud computing. If a person in France visits the same site, they would see upcoming events in Paris.

- **Ranking Policies**

  Oracle Content Management uses an out-of-the-box ranking policy by default to sort search results by relevance (provided there are no orderBy clauses on the search request). However, you can create custom ranking policies to better control the relevance score of indexed items returned by a search request.

- **Video Plus**

  Video Plus provides a rich video management and delivery experience, including all the standard video features plus advanced capabilities for optimized streaming, automatic transcoding and conversion, and more responsive playback options.

Archiving Assets

At some point you may have assets that aren't currently being used, but you're not ready delete them yet. You can archive those assets. Archived assets are billed at 1/200th the cost of normal assets.

Permissions and Roles

To access the content management user interface (**Content** under Administration in the left navigation menu), you must be assigned the Enterprise User role and have one of the following administrator roles:

- *Content Administrator*—this role allows you to create asset types and taxonomies.
- *Repository Administrator*—this role allows you to create asset repositories, publishing channels, and localization policies, and to register workflows.

Here's what you need to know about who can see or interact with different content management objects:

- **Assets area**—The Assets area is only available to enterprise users.
- **Repositories**—When you create a repository, you're assigned the Manager role on it which allows you to edit repository settings and membership. You can add other administrators to the repository as Managers to allow them to manage the repository. You can add other enterprise users to the repository as Contributors to

allow them to add assets to the repository or as Viewers to view assets in the repository.

- **Asset types**—When you create an asset type, you're assigned the Manager role on it which allows you to edit the asset type and membership. You can add other administrators to the asset type as Managers to allow them to manage the asset type. Asset types can be used to create assets in the associated repository by any repository member with at least Contributor role on the repository.
- **Publishing channels**—When you create a publishing channel, you're assigned the Manager role on it which allows you to edit channel settings and membership. You can add other administrators to the channel as Managers to allow them to manage the channel. You can add other enterprise users to the channel as contributors to allow them to publish assets to the channel.
- **Taxonomies**—When you create a taxonomy, it's created in a draft state. To allow users to categorize assets with the taxonomy, you have to promote it, and then add it to a repository.

Understand Business Asset Repositories

Every organization generates large amounts of documents and information. Even small and medium organizations may need to process tens of thousands of new documents a month. Large businesses often generate millions of documents monthly. Managing these business assets effectively means being able to efficiently capture, validate, route, and organize your business documents so you can find what you need when you need it. Let’s look at some of the Oracle Content Management features available to streamline the document management process.

Oracle Content Management allows business users to manage business assets in one or more business asset repositories. A business asset repository is a storage location for back-office and transactional business assets. A business asset can be a business document, such as an invoice or contract, or structured content in the form of a content item, such as an employee record or supplier data.

As a repository administrator, you create asset types that mirror your business, based on the kind of content you want to store in your repositories, along with the required metadata for each asset type. You can then associate these asset types with repositories. You can also assign taxonomies to a repository to allow users to categorize assets.

Combinations of taxonomy categories and asset types can be used to apply granular security to a repository in order to ensure only authorized users with the appropriate security clearance level can access confidential documents. You can also use granular security to control who can manage, contribute, or view business documents in each repository.

Business asset repositories are designed to manage content securely. Therefore, business assets can't be published to publishing channels. However, they can still be surfaced in secure websites and headless experiences by querying lists of assets dynamically via the API or by leveraging the Embed UI to show a filtered view of the repository directly inside web applications.

You can create multiple repositories to handle your different business needs. For example:

- You could set up one repository to support employee records and data. Assign asset types to the repository to collect documents such as employee resumes, hiring documents, benefit forms, and payslips. Create content types to collect information such as employee data or vacation requests. Add workflows to the repository to streamline processes such as hiring or reviews.

- Set up another repository to support customer contracts and invoices. Assign asset types with custom attributes to support legal or tax requirements. To allow asset categorization for individual products or customers, assign taxonomies that represent your product hierarchy or industries, as applicable for your business. To help contributors categorize assets or simply find relevant business documents, enable the smart content feature on the repository.
- Your organization may work with external suppliers who provide product images and documentation. You could set up a repository for collaboration with these suppliers. Assign content connectors for Google Drive, OneDrive, or other third-party content providers, allowing the suppliers to upload business assets from these external repositories.

Let's use an *Employee* repository as an example to guide you through the setup of a business asset repository to manage all your employee records and documents. Here's the process you could use to create the required dependencies and get your repository set up:

- **Asset Types**

  Your employee repository will include employee records (with data such as contact information and start date) and documents such as PDF files of the employee's resume and payslips. In Oracle Content Management this content will be represented as assets of one of two types:

  – **Content type** which defines the structure of data that a content item can store. To store information about the employees, define an *Employee Record* content type with a text field *Name* for the employee's name, a text field *Job Title* for the job title, a date field *Start Date* for the date the employee was hired to start, a reference field *Resume* to reference the employee's uploaded resume, and other fields for employee contact information and such. You could also create content types for vacation requests or time cards.

  – **Digital asset type** which defines the file types that a business document can store and the structure of attributes (metadata) to describe the document. Use the out-of-the-box File type to manage PDF documents for documents such as resumes or W4 forms; or, define custom digital asset types. For example, define an *Employee Payslip* digital asset type with a reference field *Employee* to reference the employee record content item and a date attribute *Payslip Date*.

  Then assign all these asset types to the *Employee* repository, allowing repository members with the Manager or Contributor role to:

  – Create content items from the *Employee Record* content types.

  – Upload resumes to create business documents from the *File* type, which can then be referenced in the *Resume* field in content items created from the *Employee Record* content type.

  – Upload a batch of payslips using the *Employee Payslip* digital asset type, which can then be linked to *Employee Record* content items.

  Remember, contributors will be limited to uploading only those file types specified in the digital asset types that are associated with the repository.

- **Taxonomies**

  Employees might be organized into categories based on their department, manager, location, or job level to help managers or human resources find the information they need. For example, a human resources representative might need to find all employees in a certain building to notify them of upcoming renovations.

To facilitate filtering and searching assets in the taxonomy, Oracle Content Management enables you to define relevant taxonomies, assign them to the repository, and then use them for asset categorization. You create a taxonomy by defining a vocabulary of business terms, arranged into a hierarchy of categories that represent how content across your organization is defined and classified. For example, you could define taxonomies for your job levels, departments, and geographical regions where your organization operates, or any other hierarchy of subject categories that is relevant for your organization.

After you assign taxonomies to a repository, repository members can categorize assets, either when adding them to the repository or at a later time. A faceted search user interface allows filtering assets by categories in one taxonomy or across several taxonomies to find relevant content.

- **Repositories**

  After your asset types and taxonomies are defined, create the repository and associate the objects you created with the repository.

That completes basic set-up. At this point, your repository is ready for use. Optionally, you can enable additional capabilities on your repository to provide contributors with tools that make content capture, creation, and approval more efficient or to allow you, as repository manager, to govern the content before it's ready for use:

- **Content Capture**

  Use Content Capture to capture hard copy and electronic documents, applying tags, categories, and metadata to create assets in your repository. Use native capture tools to quickly upload and index content—such as forms, purchase orders, contracts, receipts, or invoices—from a variety of sources, including scanners, emails, and network file shares. Smart content capabilities eliminate manual effort needed to tag and categorize assets. With optical character recognition, your scanned content is converted into fully indexed and searchable content. Advanced search capabilities, such as custom relevancy, auto suggestions, stemming, spelling, and synonyms, make it faster and easier to find the content you need. When extracting metadata, Oracle's trained engine recognizes different types of documents and forms to capture pertinent information. Use workflows for multi-step content validation and approval processes to improve data accuracy.

- **Content Connectors**

  If your organization uses external cloud storage services like Dropbox, Google Drive, or Microsoft OneDrive for sharing digital assets with external design agencies, you can register a content connector for the relevant storage service with Oracle Content Management, and then assign the content connector to the repository, so that contributors can easily add files to the repository directly from the external cloud storage.

- **Smart Content**

  You can help contributors find relevant documents in search, add relevant documents to content items, or categorize assets with taxonomies by enabling the Smart Content feature on a repository. When you do so, all documents added to the repository and all content items created in the repository are processed by built-in artificial intelligence and natural language processing services, auto-tagging them accordingly and extracting keywords from the text.

- **Workflows**

Typically content requires review and approval by peers or managers before being finalized. By default, Oracle Content Management enables contributors to submit assets for review by repository managers. If your organization requires content to be reviewed in a multi-step workflow by piers, technical editors, managers, compliance, or your legal team, you can register your Oracle Integration processes with Oracle Content Management, and then assign them to a repository. Then contributors can submit assets for review through a relevant workflow. Workflow participants receive notification when a task is assigned to them and can take actions on the assets as per the role that is assigned to them in the workflow.

Archiving Assets

At some point you may have assets that aren't currently being used, but you're not ready delete them yet. You can archive those assets. Archived assets are billed at 1/200th the cost of normal assets.

Permissions and Roles

To access the content management user interface (**Content** under Administration in the left navigation menu), you must be assigned the Enterprise User role and have one of the following administrator roles:

- *Content Administrator*—this role allows you to create asset types and taxonomies.
- *Repository Administrator*—this role allows you to create asset repositories and to register workflows.

Here's what you need to know about who can see or interact with different content management objects:

- **Assets area**—The Assets area is only available to enterprise users.
- **Repositories**—When you create a repository, you're assigned the Manager role on it which allows you to edit repository settings and membership. You can add other administrators to the repository as Managers to allow them to manage the repository. You can add other enterprise users to the repository as Contributors to allow them to add assets to the repository or as Viewers to view assets in the repository.
- **Asset types**—When you create an asset type, you're assigned the Manager role on it which allows you to edit the asset type and membership. You can add other administrators to the asset type as Managers to allow them to manage the asset type. Asset types can be used to create assets in the associated repository by any repository member with at least Contributor role on the repository.
- **Taxonomies**—When you create a taxonomy, it's created in a draft state. To allow users to categorize assets with the taxonomy, you have to promote it, and then add it to a repository.

3 Set Up a Digital Asset Management Environment

Oracle Content Management is a next-generation content hub for managing any type of digital asset, from images and videos to documents, structured text, and new formats like content for 3D and augmented reality applications.

This section provides guidance on the key activities needed to provision and configure Oracle Content Management as a digital asset management (DAM) hub. The reference implementation plan is divided into two-week sprints. Both the duration and number of sprints may vary based on your specific requirements.

- Stage 1 – Discovery and Requirements Definition
  - Define your requirements and plan your content model
  - Get stakeholder agreement
- Stage 2 – Setup and Configuration
  - Provision your Oracle Cloud account and create an Oracle Content Management instance
  - Configure access to the platform
- Stage 3 – Design and Build
  - Configure your main repository
  - Set up approval workflows
  - Create a brand portal
- Stage 4 – Content Migration
- Stage 5 – Additional Customizations
  - Initiate custom DNS configuration requests
  - Connect to Oracle Marketing tools

Stage 1 – Discovery and Requirements Definition

The first phase is focused on defining the details to be implemented in subsequent phases. By the end of this phase, you should have a solid set of requirements for the initial go-live, including a content model, a migration plan and security roles and responsibilities.

Define Your Requirements

Oracle Content Management offers a sample application for configuring a generic DAM deployment. However, for a real-world project, you'll need to customize your Oracle Content Management setup to better align with your business requirements.

If you are migrating from an existing solution, you may have already defined the sort of metadata, categories, and integrations that you expect from Oracle Content Management.

However, even in this case, it's very likely that you will want to modify some of this configuration as you move to our solution.

The number of discovery sessions will depend on how much customization is required and how many different teams of users are involved. It's a good idea to try to confirm most of the key requirements early, especially with respect to the types of assets and metadata that need to be managed in the DAM system.

Some of the requirements that need to be addressed are:

- **Asset Types**—Oracle Content Management comes with a few seeded asset types (Image, Video, File). Typically, you'll extend these to create your own asset types. For example, you might create a "Product Image" type with metadata related to one or more products. You can create any number of asset types in Oracle Content Management, but typically, customers can manage most of their digital assets with six to eight asset types.
  When defining the metadata fields for each type, you should get details on the format of each field, whether the field is required, and the expectations on how users will fill out the field. For example, for a field referencing a product SKU in an external catalog, it may be necessary to perform a dynamic lookup against the catalog.
- **Taxonomies**—Oracle Content Management allows you to categorize assets with any number of taxonomies and categories. These categories could represent lines of business, teams, campaigns, audience segments, or anything else. Typically, you'll have at least one taxonomy in a repository to help organize content. You can create new taxonomies and modify the structure of a taxonomy at any time, but it's useful to have a minimum set of categories for organizing migrated content and to get users into the habit of categorizing uploaded content.
- **Translation Rules**—Oracle Content Management allows you to translate digital assets into multiple languages. Often, this is limited to translating the metadata (for example, image caption) for an asset. However, it's also possible to manage different versions of assets by language. This would be more typical when managing videos or image banners with embedded text. It's important to understand what languages and translation patterns, if any, need to be supported.
- **Publishing Channels**—Oracle Content Management is designed to allow users to push content directly to one or more channels. Typically, you'll have a channel for your brand portal (possibly multiple channels if you have multiple brand portals), a channel for your marketing automation tools (for example, Eloqua, Responsys), a channel for social publishing, and one or more channels for your websites and mobile applications.
  For each channel, you'll need to understand the expectations around how content is going to be used by that channel. For example, Oracle Content Management can be integrated with Eloqua and Responsys to allow marketers to search and select images from the repository for use in landing pages and emails. You can add additional channels at any time as needed.
- **Approval Workflows**—Oracle Content Management comes with a basic approval workflow where a single group of users is responsible for approving all content in a repository. Oracle Integration Processes can be integrated when more complex approvals and email notifications are needed. Processes includes three predefined workflows (1-step, 2-step, and 3-step). You should validate these workflows to understand if they're sufficient for your purposes or if additional workflows are needed. New workflows can be created and existing workflows modified at any time.

- **Access Control Rules**—Oracle Content Management allows administrators to quickly define who can access and modify content in a repository. It's also possible to define more fine-grained roles on a repository, limiting access to only certain asset types or certain categories of content. Access control rules can be modified at any time as needed.
- **Brand Portal**—Oracle Content Management comes with a preconfigured Brand Portal application when access to the full Oracle Content Management user interface isn't desirable. The Brand Portal allows users to search and navigate through taxonomies to find the desired assets. Assets can then be linked or downloaded to use externally. Typically, you'll adjust the logos and colors of the Brand Portal, as well as customize the home page. Multiple Brand Portals can also be created, each with its own branding. More advanced customizations are also possible if desired.
- **Legacy Content Migration**—If migration of legacy content is part of the project, the basic requirements should also be addressed as part of the discovery sessions. It's important to understand what sort of existing metadata will need to be available in the new platform. Many legacy platforms organize content by folder as opposed to taxonomies. You must determine whether the folder structure needs to be migrated, and, if so, whether it will be represented by a taxonomy or a metadata field.

As you run the discovery sessions, you might consider creating a repository directly in Oracle Content Management and making changes to the configuration during or after each session. This will allow the users to see how their decisions are reflected in the user interface.

Get Stakeholder Agreement

Once you've defined the key requirements, it's important to validate those requirements with your stakeholders. Even though it's possible to make changes later, especially as your usage evolves, it's still easier to make changes to the content model and architecture prior to setting up the system.

Stage 2 – Setup and Configuration

The second phase is focused on getting the Oracle Content Management instance up and running. In general, this stage should take no more than one sprint.

Provision Your Account and Create an Instance

Account provisioning is a mostly automated task and requires activating the Oracle Cloud tenant. This may take a day or two, depending on internal Oracle processes.

Once this activation process is complete, you can create one or more instances of Oracle Content Management from the Oracle Cloud Infrastructure console in a few minutes. For this phase, we recommend creating a single instance of Oracle Content Management. This instance should be configured as your production instance, so you should assign a name that reflects this. The name of the instance can't be modified once created. However, you will be able to assign and modify a custom DNS name for end users to access.

In later sprints, you may create non-production instances for testing or development purposes. For example, you might need to test custom portal development or test integrations with other applications.

Configure Access to the Platform

Users and groups can be created and managed from the Oracle Identity and Access Management (IAM) console that is created as part of your Oracle Cloud tenancy.

When you created your Oracle Content Management instance, several predefined application roles were created in IAM and associated with that instance. These application roles define the access rights to specific features in Oracle Content Management. From the IAM console, you can create users and groups, and assign them to each of these roles.

Oracle IAM can also be configured to federate authentication of some or all users against an external directory, like Active Directory.

For this sprint, we recommend configuring the needed users and roles directly in IAM. Configuring federated authentication and SSO can be done later or in parallel by the security team.

Stage 3 – Design and Build

At the end of the discovery phase, you should have most of the information you need to start the configuration of Oracle Content Management for your specific requirements. This third phase is focused on implementing the core configuration identified in the discovery sessions. By the end of the phase, you should have a fully configured DAM repository and significant customizations based on your requirements.

In general, this stage should take no more than one or two sprints.

Configure Main Repository

Oracle Content Management supports the creation and configuration of any number of repositories. However, you'll generally have a main repository where most of the management of your digital assets is centralized. This phase will focus on getting this repository configured.

You can start by creating an empty repository in Oracle Content Management. As you create the other artifacts (for example, asset types), you'll need to edit this repository definition so that users can see them from inside the repository. You'll need to create the following artifacts:

- **Asset Types**—Create the different asset types you identified in the discovery sessions. If there are no requirements for metadata, you can use the default asset types: Image, Video and File.
- **Publishing Channels** and **Localization Policies**—Create one or more publishing channels to represent the different ways content will be consumed from the repository. If integrating with one or more Oracle Marketing tools (for example, Eloqua, Responsys), you can create a single channel with a name like “Oracle Marketing”. You don’t need to create a channel for the Brand Portal. This will be created later if needed.
  For each publishing channel, you'll need to define the languages and policies supported on that channel. You can create a different localization policy for each channel where you publish content if desired or create a single localization policy to be shared across all channels.
- **Taxonomies**—Create one or more taxonomies based on the categories you identified in the discovery sessions. Additional taxonomies might be added later as you create brand portals and migrate content from legacy repositories.
- **Translation Connectors**—If you need automated translations, you may want to consider activating the preconfigured translation connector for Lingotek or adding

your own translation connector. Most automated translation services, including Lingotek, will have an additional cost associated.

- **Content Connectors**—Oracle Content Management offers a few built-in connectors for ingesting content from common cloud services like Google Drive, OneDrive, and such. If any of these are important for the project, then you'll want to configure these according to the documentation.

Once you have created the different artifacts, you'll need to make sure to add them to the repository.

Assuming you have the right level of details from the discovery sessions, configuring a new repository with these artifacts is quick and easy. The work itself can typically be done in a few hours. However, it’s not uncommon to make a few iterations of changes to your content model or identify other changes to ensure usability of the solution.

Set Up Approval Workflows (if needed)

You can review assets with basic out-of-the-box approve/reject workflow, or, if configured, you might be able to take advantage of workflow from Oracle Integration. It's possible for different repositories to have different review or workflow options.

If you need more advanced role-based workflow approvals, you'll need to create an instance of Oracle Integration Process in your Oracle Cloud tenant. This service carries an additional monthly cost.

Once your Oracle Integration instance is up and running, you'll need to follow the documentation to connect it to Oracle Content Management and deploy the sample approval workflows. After you deploy the workflows, you can map workflow roles to Oracle Content Management users from the Oracle Content Management user interface.

Assuming you don’t need to modify the preconfigured workflows, this setup can be done in a couple of hours.

Create a Brand Portal

Oracle Content Management includes a brand portal sample that can be customized as needed to support end users that don’t need direct access to the console. Installing the brand portal takes just a few minutes. It will create a new asset type, a new taxonomy, and a new publishing channel in your repository.

Once the brand portal has been created, you'll want to make a few simple changes, including:

- Change the logo to your corporate logo.
- Change the color scheme to match your corporate branding.
- Update the home page to show key assets or share instructions on how to use the portal.
- Adjust the localization policy to match your language requirements.
- If desired, you can also make changes to the taxonomies and filters that allow users to navigate through the library of assets in the brand portal.

To make content available to users in the brand portal, all you need to do is to publish those assets to the Brand Portal channel.

Assuming you don’t need to make significant changes to the sample brand portal, getting the portal set up may take anywhere from a couple of hours to a couple of days.

Stage 4 – Content Migration

If migrating content from legacy repositories is part of the project, this effort should be kicked off as soon as possible, especially if the migration needs to happen before go-live. Technically, you can start using the platform before legacy content has been migrated. As the migration progresses, you will have access to the content automatically as it appears in Oracle Content Management.

In general, this fourth stage is the longest. It can take a few short sprints if there is little data to migrate, or it can take several sprints if there are a lot of assets that need to be migrated and mapped to the new content model.

Stage 5 – Additional Customizations

By the end of the third phase, you'll have a working DAM solution. That includes a central repository, a brand portal, and optional workflows. If all you need is simple image and video management, possibly integrated with Oracle Marketing tools, then you may not have any additional requirements and you can now go live. Otherwise, there are a few advanced customization or configurations that you may want to do.

Initiate Custom DNS Configuration Request (if needed)

By default, content published to public channels will be automatically cached by the embedded CDN service, leveraging a customer-specific DNS name in this format:

```
https://<<CustomerInstanceName>>-
<<CustomerTenantName>>.ocecdn.oraclecloud.com
```

Optionally, you can configure the embedded CDN services to cache against a custom DNS hostname. To do this, you need to open a Service Request (SR) with Oracle Support. This process can take up to two weeks to complete, so try to start the process as soon as possible to ensure it doesn't affect your project go-live.

Connect to Oracle Marketing Tools (if needed)

If you want to use Oracle Content Management as a central asset hub for Eloqua, Responsys, or Maxymiser, you can quickly configure these integrations. Integration with each tool is done a bit differently. In some cases, you can configure it yourself. In others, you'll need to open an SR. In all cases, the integration will require you to have the details for your repository and have a specific public channel created for accessing published assets.

You should be able to set up connections to all services in a day at most.

4 Key Concepts

Here are some key concepts that can help you understand how to manage assets with Oracle Content Management:

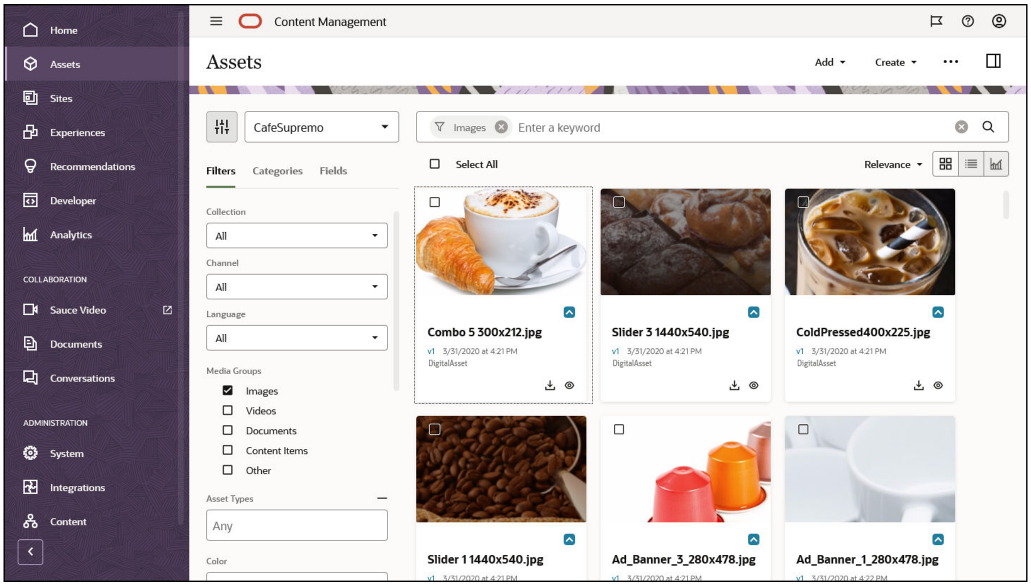
- Repositories
- Asset Types
- Digital Assets
- Business Documents
- Structured Content
- Smart Content
- Taxonomies
- Collections
- Tags
- Workflows
- Localization Policies
- Publishing Channels
- Ranking Policies
- Recommendations
- Video Plus

Repositories

A repository is basically a big "bucket" used to store all the assets needed for a project or a group or a campaign. Repository administrators can set up as many repositories as needed for different asset management projects.

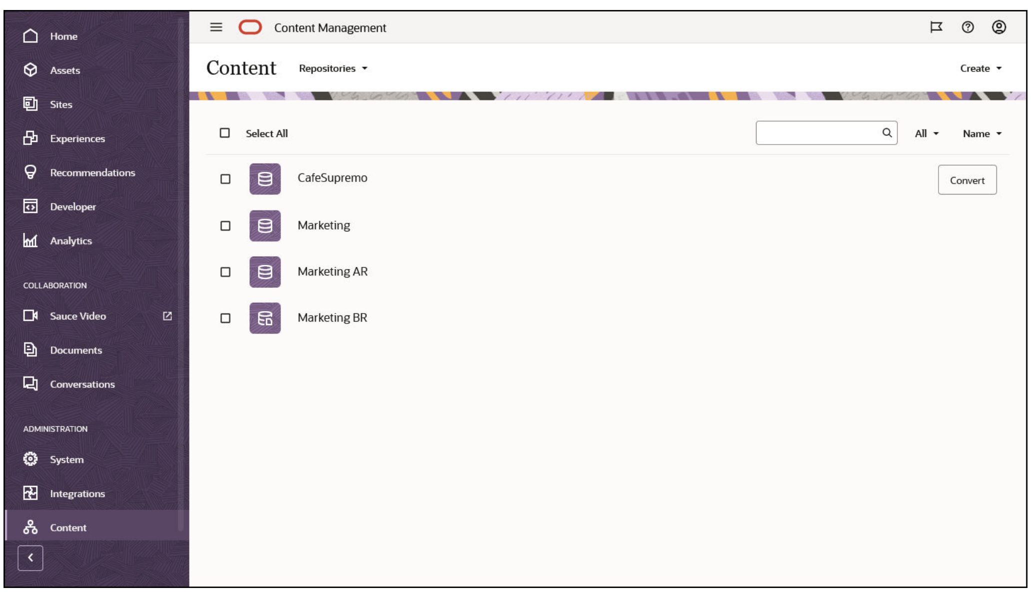
There are two types of repositories: business repositories and asset repositories. *Business asset repositories* store business documents (such as invoices, contracts, engineering drawings, or reports) and structured content in the form of a content item, such as an employee record or supplier data. *Digital asset repositories* store digital assets (such as images, videos, and files) and content items (structured content such as blogs or press releases) that need to be published for use within digital experiences (websites and other channels) or translated into multiple languages.

Consider different departments in your company, such as sales, finance, and marketing. All these departments have their own teams of people working on content. Content from the finance department may not be relevant (and sometimes not even accessible) to people in the sales department, at least during part of the content life cycle. Content used by the marketing department can be accessible to teams working for other departments, but restricted only to review and not to modify or to publish. Your sales and finance departments don't need to publish or translate their content, so they use business asset repositories; while your marketing department uses a digital asset repository so they can publish their translated content.



Your organization could create separate repositories for each department or context and assign their respective teams as users of that repository with specific rights. When users sign in to Oracle Content Management, they are assigned to relevant repositories, and access privileges are granted to them for repositories to allow for contribution, review, or approval. Some users might be involved with more than one department and may need access to content in multiple repositories.

If you have the appropriate privileges, you can create repositories in the Oracle Content Management web interface under **Administration** > **Content**.



All aspects of the content life cycle—including management, workflow, and revision tracking—are available in the context of repositories that assets are part of. To that end, each repository has asset types, taxonomies, content connectors, and workflows associated with it. In addition, *digital asset repositories* have associated publishing channels, localization policies, and translation connectors.

Repositories are silos, which means that assets from one repository can’t be seen or referenced by another repository. It must be copied into another repository. However assets from multiple digital asset repositories can be published to the same channel, meaning that even though the assets are *managed* in different silos, they can be *consumed* together in clients.

Learn more...

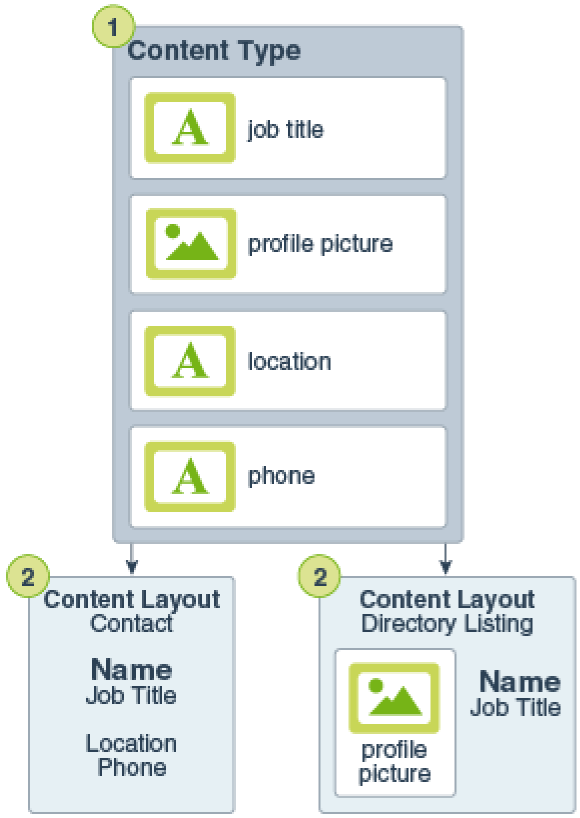
Asset Types

Asset types define what information is needed for your assets. The asset information is saved separately from the layout (the way the asset is presented). That way, the assets users create can be used wherever they might be needed, appearing in a way that fits the situation.

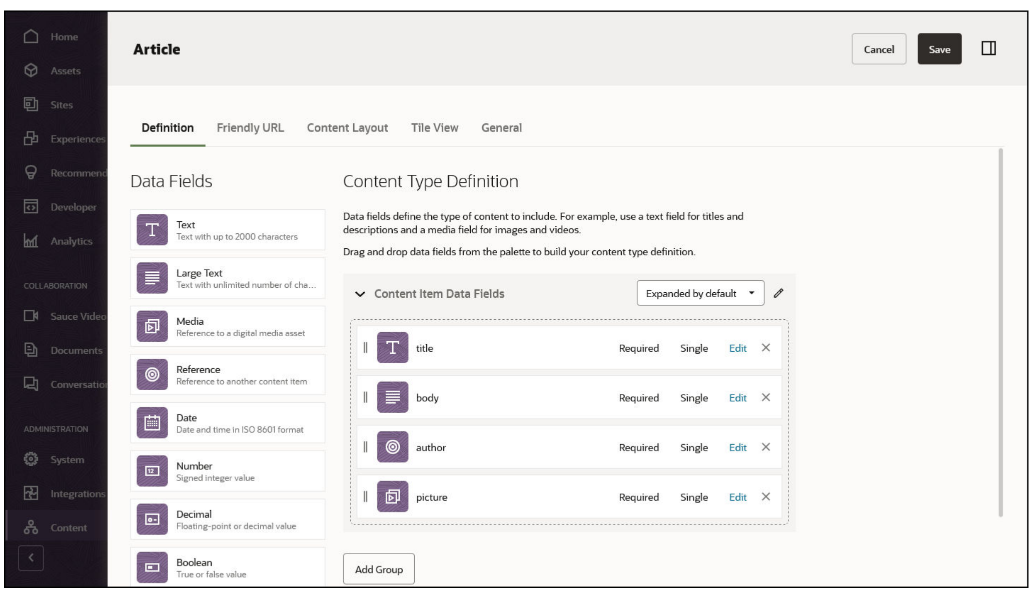
There are two main asset types: *digital asset types* and *content types*.

A *digital asset type* defines what information is included with a digital asset or business document such as an image, a video, or a file. For example, an image might include EXIF information from the camera (date, time, location, resolution, and such), system settings (asset creation date, last updated, status, version, and such), and custom metadata. That custom metadata is where the digital asset type comes in. You might want to collect copyright, permitted use, and contact information for each of your images. Oracle Content Management includes several out-of-the-box digital asset types: file, image, and video.

A *content type* is a framework used to specify what information is included in a content item. The image below shows a **content type (1)** and two associated **layouts (2)**, which determine how the content appears and what information is used in that particular layout. For example, you may only want a subset of information to appear on an employee contact list, but you might want an employee picture, location, and job title appear in another location in a manager's view. When you create a content item using a content type, you can preview how it will look with different layouts.



If you have the appropriate privileges, you can define asset types in the Oracle Content Management web interface under **Administration** > **Content**.



Each asset type consists of a set of field definitions. In the preceding example, four fields have been defined for a content type named 'Article': title, body, author, and picture. These fields show in the data entry form users fill out when they create an asset based on the asset type.

Once an asset type is defined, it needs to be added to a repository and users must be given contributor access so that they can create assets of that type in the repository.

Learn more...

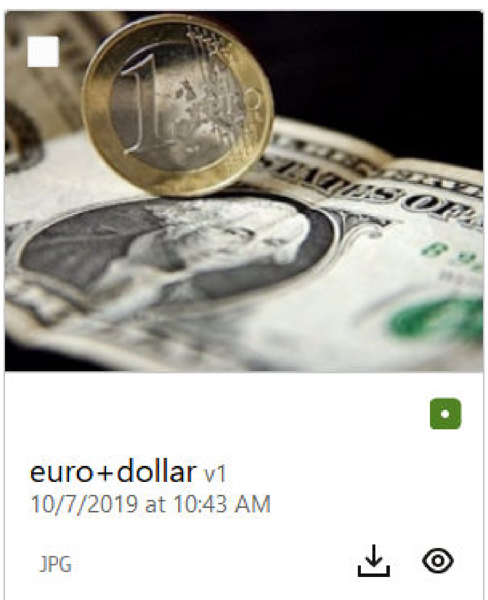
Digital Assets

You use a lot of digital assets in your organization—images, videos, and files—that are used in different ways, in different contexts: websites, marketing materials, email campaigns, online stores, blogs. Text-based digital assets (such as PDFs and Microsoft Word documents) are mostly used for content modeling and publishing—as such, they differ from *business documents*, which are back-office documents needed to manage and run a business, and *"regular" documents*, which are intended more for content collaboration, sharing, and syncing.

Oracle Content Management provides a central location for all your digital assets, where you can organize them into repositories and collections, and create rules to define how they can be used and where. It also offers extensive management and workflow features to guide assets through their creation and approval process and to ensure that only authorized versions are available for use.

Digital assets are based on digital asset types, which define what information is needed for the associated assets. This includes information such as the supported file formats, asset attributes, content layouts, and associated rendition policies (which enable you to automatically generate image renditions for use in your various channels).

To create a digital asset, you can upload or drag and drop a new file into the assets view in the Oracle Content Management web interface. You can also select an existing file in Oracle Content Management and add it to a repository as an asset (which is completely separate from the original file).



Digital assets are stored in a digital asset repository, which allows you to group assets and control how they can be used. Once an asset has been added to a digital asset repository, you can manage its image renditions, categorize it with taxonomies, review it through workflows, translate it following the localization policies, and publish it to a channel.

Digital assets can also be accessed programmatically through REST API calls, for example in a 'headless' environment.

Learn more...

Business Documents

Your organization works with a lot of business documents—invoices, contracts, engineering drawings, reports—that are needed for different reasons—reference, retention, record keeping. Business documents are back-office documents used to manage and run a business—as such, they differ from *digital asset documents*, which are mostly used for content modeling and publishing, and *"regular" documents*, which are intended more for content collaboration, sharing, and syncing.

Oracle Content Management provides a central location for all your business documents, where you can organize them into repositories and collections, and create rules to define how they can be used and where. It also offers extensive management and workflow features to guide documents through their creation and approval process and to ensure that only authorized versions are available for use. Business documents are associated with asset types, which define any additional information needed for the asset. To create a business document, you can upload or drag and drop a new file into the assets view in the Oracle Content Management web interface. You can also select an existing file in Oracle Content Management and add it to a repository as an asset (which is completely separate from the original file).

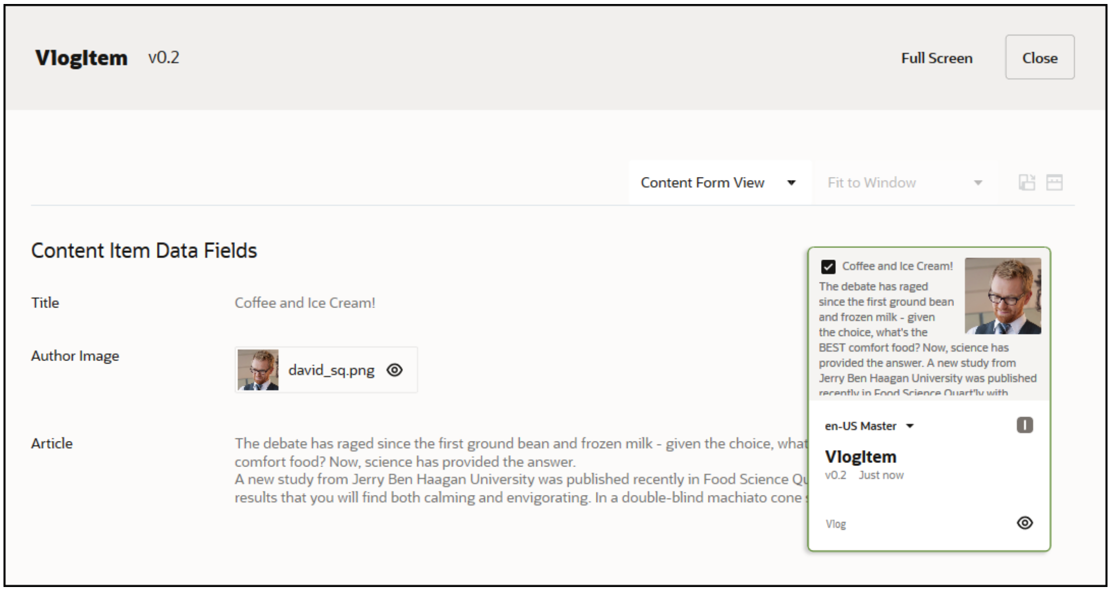
Business documents are stored in a business asset repository, which allows you to group assets and control how they can be used. Once an asset has been added to a business asset repository, it can be categorized with taxonomies and reviewed through workflows.

Business documents can also be accessed programmatically through REST API calls, for example in a 'headless' environment.

Learn more...

Structured Content

Structured content in the form of content items are pieces content that are treated as assets and managed in a repository. This kind of content exists separately from any file or layout. Content items are essentially individual instances of a content type, which defines what this structured content consists of. Say you have an content type called 'Article' consisting of a title, a body, an author, and a picture. Each article is captured in a content item, which consists of a specific combination of title, body, author, and picture. Each of these elements may exist in Oracle Content Management as an asset of its own, but the article as a whole will also be managed as a separate asset. The elements of the content item can all be used wherever they're needed, either as one cohesive group or separately in different layouts and formats.



Content items can be stored in a digital asset repository or a business asset repository, which allows you to group assets and control how they can be used. Once an asset has been added to a repository, it can be categorized with taxonomies and reviewed through workflows. For content items stored in digital asset repositories, they can also be translated following the localization policies and published to a channel.

Content items can also be accessed programmatically through REST API calls, for example in a 'headless' environment.

Learn more…

Smart Content

Smart content makes it easy for creators and authors to discover content.

The Problem

Companies have thousands of digital assets and business documents (images, HTML pages, videos, PDFs, text, and such) in Oracle Content Management. These assets are valuable only when content creators, authors, and consumers can discover the content when they need it.

In order for content to be discovered, it must be tagged and classified. The content needs to be tagged with metadata describing the content and its meaning. Then the tagged content needs to be organized so that it can be found and delivered in the right context at the right time.

Until now this tagging and classification has been a manual process. A median enterprise might spend hundreds of hours to tag and classify content, plus additional time to maintain accuracy. Failing to keep up with content tagging and classification leads to content discovery problems.

Oracle wanted to find a way to make content discoverable without the need for manual tagging and classification, and take it a step further and recommend the right assets without the user even needing to search.

The Solution

Smart content is Oracle Content Management's answer. We use artificial intelligence (AI) to analyze content, improving content discovery. Smart content includes the following features:

- **Smart search**, which analyzes images for color and content and automatically creates tags for them. This improves the discoverability of images, providing relevant search results to users, without having to painstakingly tag images.
- **Smart video transcription**, which processes English language .mp4 and .mkv videos and automatically creates transcripts for them. Again, this improves discoverability and enables users to find a particular spot in a video. It provides accessibility support through closed captioning. It eases the task of supporting multilingual videos because the transcripts make video translation more efficient and cost-effective.
- **Smart authoring**, which recommends the right images during the authoring process. Users don't need to tag or search for images; images will be recommended based on the intent expressed in the current article.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, smart authoring isn't supported. To take advantage of the full feature set, upgrade to the Premium Edition.

How Smart Content Works

The backbone of smart content primarily consists of two types of AI models:

- Computer vision models that are trained on millions of images to detect the relevant objects and parameters in new images. As new images are uploaded into repositories, they're automatically tagged to improve discoverability. When a user performs a search, the most relevant results are returned based on those automatic tags and any manual tags you may have applied. Oracle Content Management also shows *smart keywords* (recommended keywords) to help users further refine their search.
- As new English language .mp4 and .mkv videos are uploaded into repositories, they're automatically processed to create transcripts. The transcript is automatically evaluated to assure it's of sufficient quality and automatically tagged to improve discoverability. A user can then view and search the transcript. When a user performs a search, the most relevant results are returned based on the transcript, the automatic tags, and any manual tags you may have applied.
- Natural language processing (NLP) models that can derive the main intent from an article. This intent is used to recommend relevant images by matching the article intent to the automatic tags generated using the above computer vision models.

> **Note:**
>
> The AI models were trained using data provided by third parties and are constantly evolving. As a result, search results may vary and may not be complete or accurate. Users have the option of manually tagging content as discussed in the FAQ below. Oracle makes no claim or representation regarding the completeness and accuracy of the results of the search services and is not responsible for the results.

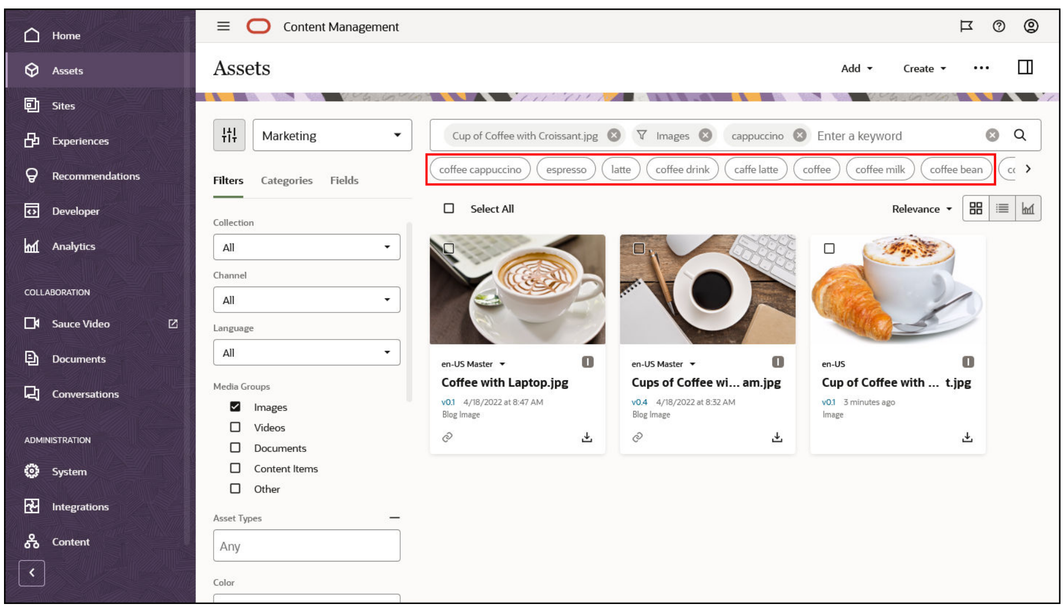
The Process

Smart content is enabled by default for any new repositories you create. For existing repositories, your repository administrator needs to manually enable smart content.

> **Note:**
>
> To take advantage of smart video transcription, your administrator might have to enable OCI services content sharing for your instance.

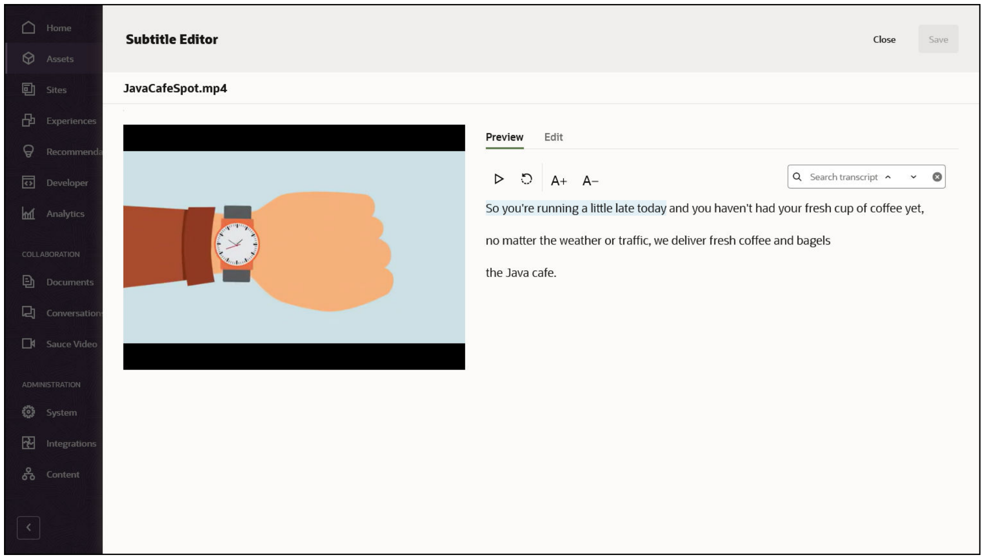
- **Smart search**

  When a user searches for assets, Oracle Content Management will recommend search keywords.



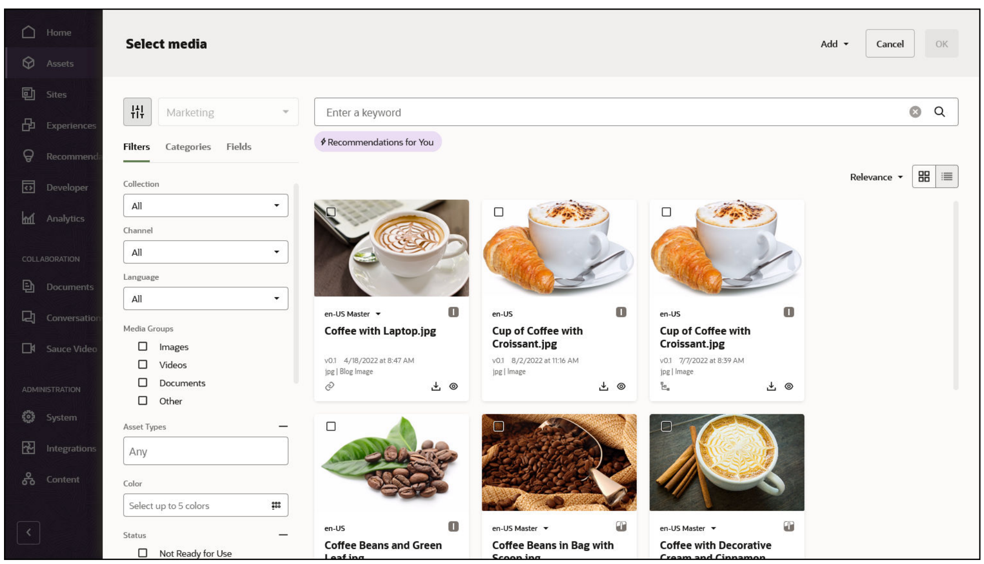
- **Smart video transcription**

  When a user uploads an English language .mp4 or .mkv video, the video is processed and a transcript is automatically created. Then the user can view and search the transcript.



- **Smart authoring**

  When a user creates a content item and wants to include an image, Oracle Content Management will determine the intent of the article and suggest relevant images.



Frequently Asked Questions

- **Is there a way to turn off smart content and undo any related changes?**
  Yes. Turn off smart content in the repository.
- **How do I improve search behavior when smart search doesn't find the asset I'm looking for?**
  If smart search doesn't return the complete and accurate results for a search keyword, you can manually tag assets with the specific search terms you're looking for.
- **Why are smart content tags on images read-only?**
  When you view the tags for an image, the tags shown under **Smart Content Tags** are the highest ranked machine tags. Machine tags are read-only because they aren't meant to be manually curated. Oracle Content Management analyzes

images based on as many parameters and attributes as possible, leading to dozens of machine tags. In addition, our AI models are constantly improving, so machine tagging gets better as new images are added. If you're not able to find what you're looking for, you can always add manual tags. Oracle Content Management gives the highest importance to manual tags when returning results.

- **Does data leave Oracle servers?**
  No.
- **Is any of our usage data being logged?**
  Oracle Content Management does non anonymous logging to understand usage of the functionality in an effort to improve the service.

Video

Taxonomies

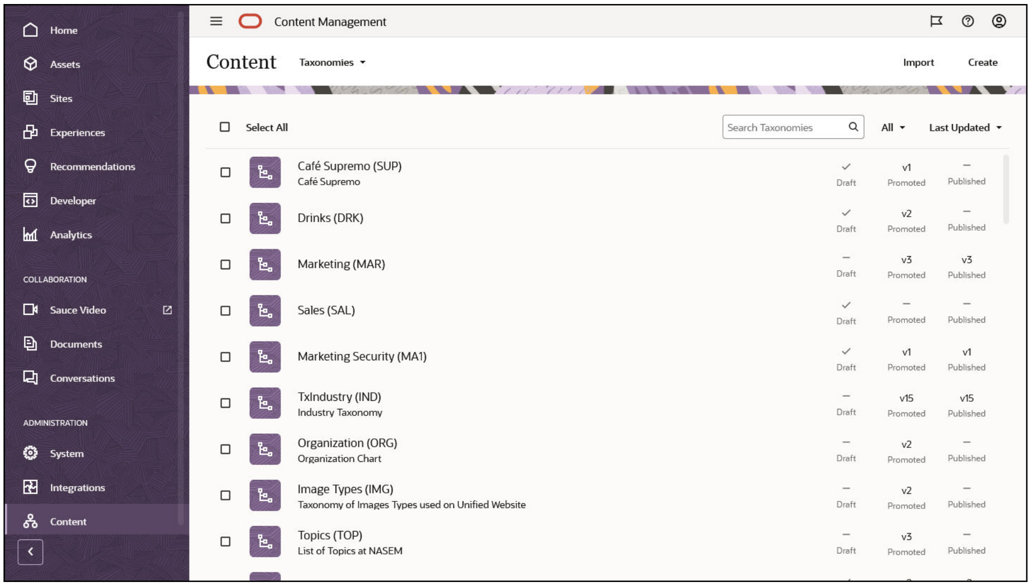
A taxonomy is a hierarchy of categories used to organize your assets and to help users find assets by drilling down into the area they're working on.

Let's have a closer look by taking a computer hardware taxonomy as an example:

```
Computers
        Desktop
        Laptop
        All-in-One
        Server
Tablets
        iPad
        Android
Printers
        Inkjet
        Laser
```

In this example, the Hardware taxonomy has three top categories (Computers, Tablets, and Printers), and these categories in turn have several children. Those child categories can each have their own child categories, and so on. Such a structure of logical entities essentially represents a hierarchical set of categories.

If you have the appropriate privileges, you can define taxonomies in the Oracle Content Management web interface under **Administration** > **Content**.



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

Once a taxonomy and categories are defined and assigned to an asset repository, content authors can classify content into categories of that taxonomy. Unlike storing something in a folder, taxonomies allow you to associate assets with one *or more* categories. A category is merely a logical placeholder for content that belongs to a specific concept.

Learn more...

Collections

A collection is a way to group a subset of assets within a repository. For example, you may have a repository with content pertaining to sports cars. You could use a collection to group together all digital assets for American sports cars, one for French sports cars, and one for Italian sports cars. The assets for all sports cars will be managed in the repository, but you can manage a subset (American sports cars) separately. Assets can be put into the appropriate collection, making it easy to quickly sort through and find exactly what you want.

Assets can be associated with multiple collections within a repository. However, unlike taxonomies, collections are specific to an individual repository. If you create a collection in one repository, you won't have access to it when viewing another repository.

Learn more...

Tags

A tag is a keyword that lets you find an asset quickly. Unlike categories, tags don't have a hierarchical structure.

If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content and colors in the image, but you can also manually add tags to any kind of asset when you create or upload it, or you can edit the tags at a later time.

You can search for assets by using a tag as a search term, helping you find assets quickly.

Learn more...

Workflows

If your service administrator has integrated Oracle Content Management with Oracle Integration, and your content administrator has registered Oracle Integration workflows, you may have additional workflow options available to you.

Workflows streamline asset validation and approval. Workflows combine business processes and content services to support a variety of requirements, including document verification, process approvals, and complex case management. You can submit your digital assets or captured documents and their associated metadata for review and approval without leaving the web console, easily assigning workflows to content by type and repository. You can even initiate a business process by uploading a document to your hub. Easily set up different document types to initiate different business processes.

> **Note:**
>
> Workflows aren't supported in Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject review functionality. To use workflows and take advantage of the full feature set, upgrade to the Premium Edition.

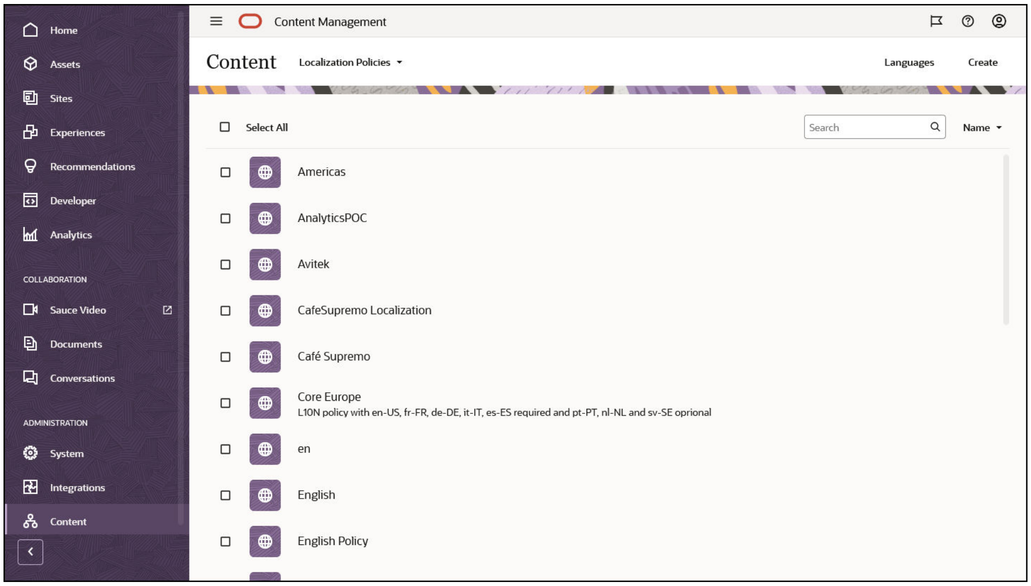
Learn more...

Localization Policies

Any digital asset or content item stored in a digital asset repository can be translated into multiple languages. Localization policies are the translation rules applied to assets in a repository. They define if a translation will be required and if so, what the required and optional languages (if any) are and what the default language is. This is particularly helpful if you need to work with multilingual content.

> **Note:**
>
> Localization policies aren't used in business repositories.

If you have the appropriate privileges, you can define localization policies in the Oracle Content Management web interface under **Administration** > **Content**.



After a localization policy is created, you associate it with a publishing channel.

Learn more…

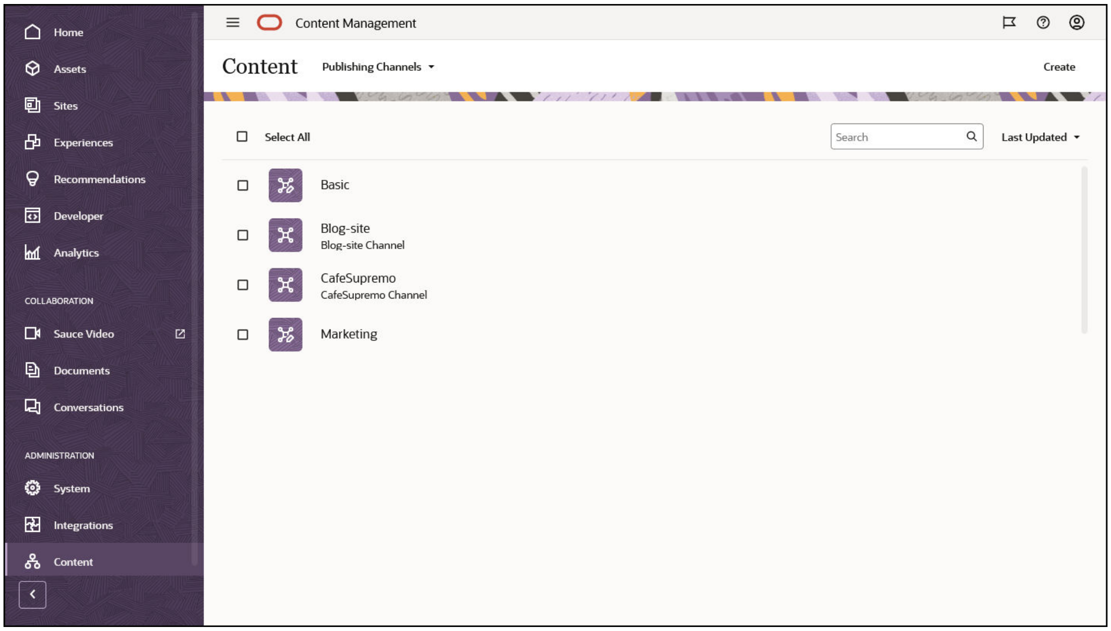
Publishing Channels

A publishing channel is a specific context in which a digital asset or content item stored in a digital asset repository can be used. It determines the release rules that are applied to the asset. A channel can be applied to one or more repositories and one repository may use multiple channels. Specific assets in a repository can use different channels, letting you fine-tune the policies to be applied in individual cases. When you create a website in Oracle Content Management, a publishing channel is created automatically using the site name as the channel name. You can also define publishing channels for other contexts.

Note:

Publishing channels aren't used in business repositories.

If you have the appropriate privileges, you can define publishing channels in the Oracle Content Management web interface under **Administration** > **Content**.



Once an asset is published, it's available to the publishing channels associated with it. When an asset is set to be published, it’s evaluated against the policies that were defined for the targeted channel, for example the localization policies. If the asset doesn't meet the policy criteria, then it can’t be published. This ensures that only those assets are published that have been validated against the policies that were created.

Learn more...

Ranking Policies

Oracle Content Management uses an out-of-the-box ranking policy by default to sort search results of published items by relevance (provided there are no orderBy clauses on the search request). However, you can create custom ranking policies to better control the relevance score of indexed items returned by a search request.

> **Note:**
>
> Ranking policies can't be applied to business repositories as the assets in business repositories aren't published.

Once you create a ranking policy, you can test it before you publish it, making it available to use as a global default, a publishing channel default, or in a search query.

Learn more...

Recommendations

Recommendations are a way to provide personalized experiences for website visitors by showing assets based on audience attributes such as location or areas of interest.

> **Note:**
>
> Recommendations can't be associated with business repositories.

Recommendations are associated with a repository and a specific content type, and the recommendation rules compare values in a content type field with values from audience attributes. Attributes can be unique to a session, such as location information based on the IP address of a site visitor, unique to a system, such as the current date, or other custom attributes defined by an administrator, such as what product interests a site visitor. For example, site visitors with European IP addresses may first see event announcements for Europe on the site home page, while site visitors from North America will see events in the U.S. and Canada.

When used in a site, a recommendation selects and displays assets available in a repository that satisfy all the rules defined in the recommendation, helping you easily provide a personalized experience to the site visitor.

Learn more...

Video Plus

Take a guided tour (English only)

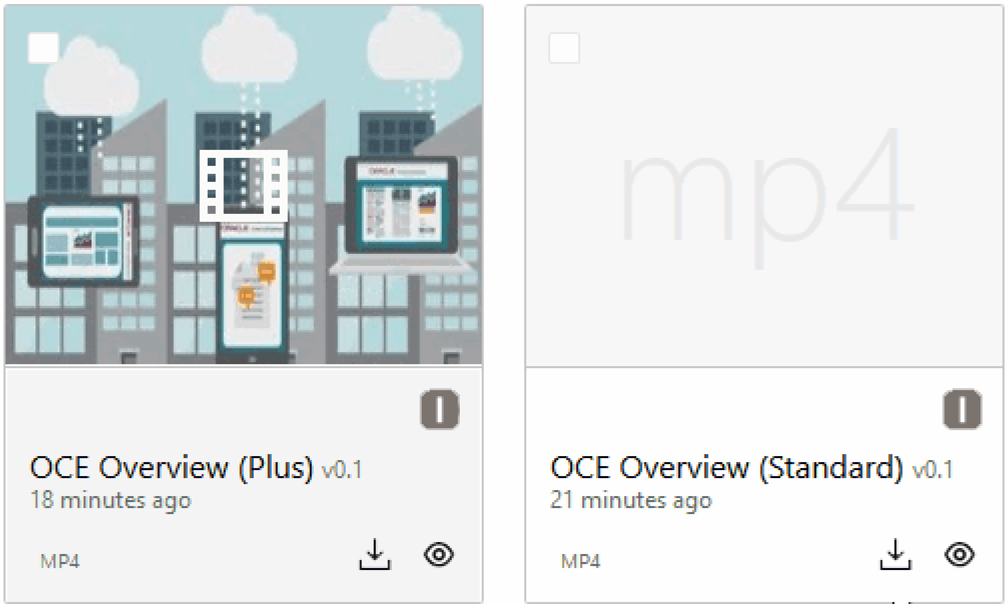
Video asset management and delivery in today's visual world are more and more important. Your audiences expect rich online experiences in websites and other contexts, and videos play a large part in that.

Oracle Content Management serves as a central hub for all your digital assets, including videos. It provides two options for managing and using video assets:

- **Standard video**, which provides the same management and delivery capabilities as for any other assets, providing tagging, categorization, review, workflows, conversation, basic playback, and so on.
- **Video Plus**, which provides a rich video management and delivery experience, including all the standard features plus advanced capabilities for optimized streaming, automatic transcoding and conversion, and more responsive playback options.

> **Note:**
>
> - If you're using Oracle Content Management Starter Edition, Video Plus isn't supported. To take advantage of the full feature set, upgrade to the Premium Edition.
> - Video plus isn't supported in business repositories.

Video Plus is an optional feature for Oracle Content Management that must be enabled for your instance by your service administrator. Once that’s done, repository managers can associate a Video Plus asset type to a repository. Oracle Content Management includes an out-of-the-box Video Plus asset type, or you can create a custom digital asset type and enable Video Plus support in it. Users can then select a Video Plus asset type for their assets to take advantage of the Video Plus capabilities.



Standard Video Features

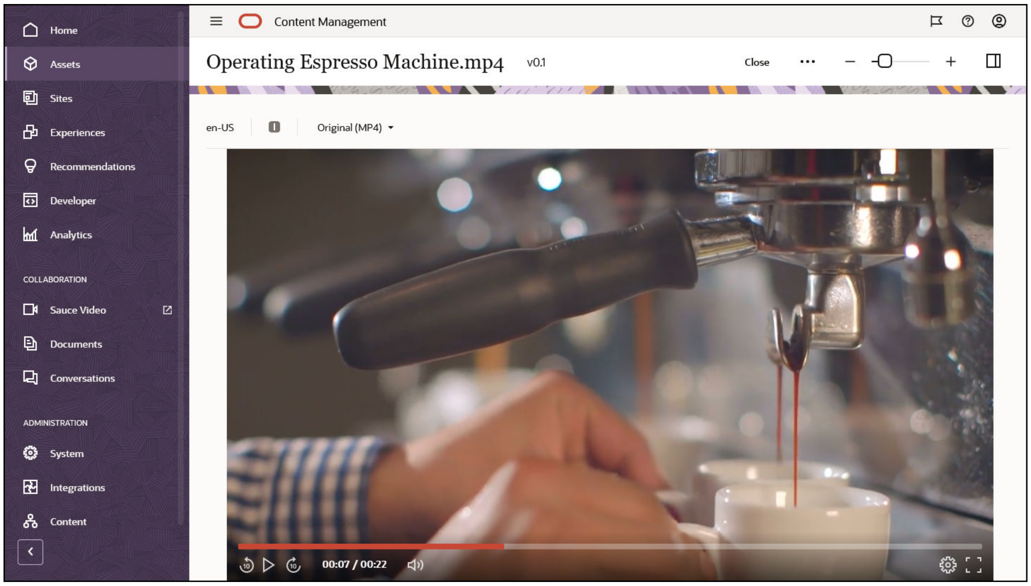
While standard video assets can be used on a site, there are limitations in how they're delivered. For example, standard video assets rely on the web browser for playback. As such, it's recommended that a standard video be in MP4 format, because that's common to all supported browsers. Since different devices save video in different formats, this means you may need to manually convert your video asset before uploading it to Oracle Content Management.

Also, because you're relying on the web browser for delivery, video controls are often limited to simple functionality like play, pause, and volume. Additionally, a standard video asset must be downloaded in its entirety before it begins to play, which may cause a lag in delivery if the video file is large or there are any network buffering issues.

Video Plus Features

Video Plus assets are streamed using adaptive bitrate streaming, which means that playback begins right away without waiting for the full video to download. The stream adapts to your network conditions even while they change, to optimize the stream so your audience will have a good experience viewing the video, regardless of what device, web browser, or network they use.

With Video Plus you can upload videos of any format, and Oracle Content Management makes sure that they are transcoded and converted to the right formats for optimal delivery. Hover over a Video Plus video to see an animated preview of the video, and take advantage of additional playback features such as specifying video quality and varying the playback speed from half speed to double speed. Plus, you can easily skip ahead or go back in a video, or drop anywhere onto the video timeline with a click without waiting for the video to reload.



Here's a side-by-side comparison of the standard video and Video Plus features offered by Oracle Content Management:

Feature	Standard Video	Video Plus
Asset tagging	✓	✓
Workflow review	✓	✓
Conversations	✓	✓
Automatic thumbnail in grid view		✓
Animated preview		✓
Automatic format conversion		✓
Adaptive streaming		✓
Video Editing		✓
Immediate playback		✓
Automatic resizing to fit page		✓
Quick navigation within videos		✓
Variable playback speed		✓

Feature	Standard Video	Video Plus
Adjustable video quality		✓

Part II

Manage Digital Assets

Digital assets are any assets that need to be published for use within digital experiences (websites and other channels) or translated into multiple languages. They can be images, videos, and files, as well as content items (structured content such as blogs or press releases).

> **Note:**
>
> If you manage business documents (such as invoices, contracts, engineering drawings, or reports) that are needed to run your business but don't require publication or translation, you should instead use *business assets*.

You can perform the following tasks to manage digital assets:

- Get to Know the Assets Page
- Create and Edit Digital Assets
- Create and Edit Structured Content
- View Assets and Their Data
- Organize Assets
- Review Assets
- Localize Assets
- Publish Assets
- Manage Assets
- Use Recommendations

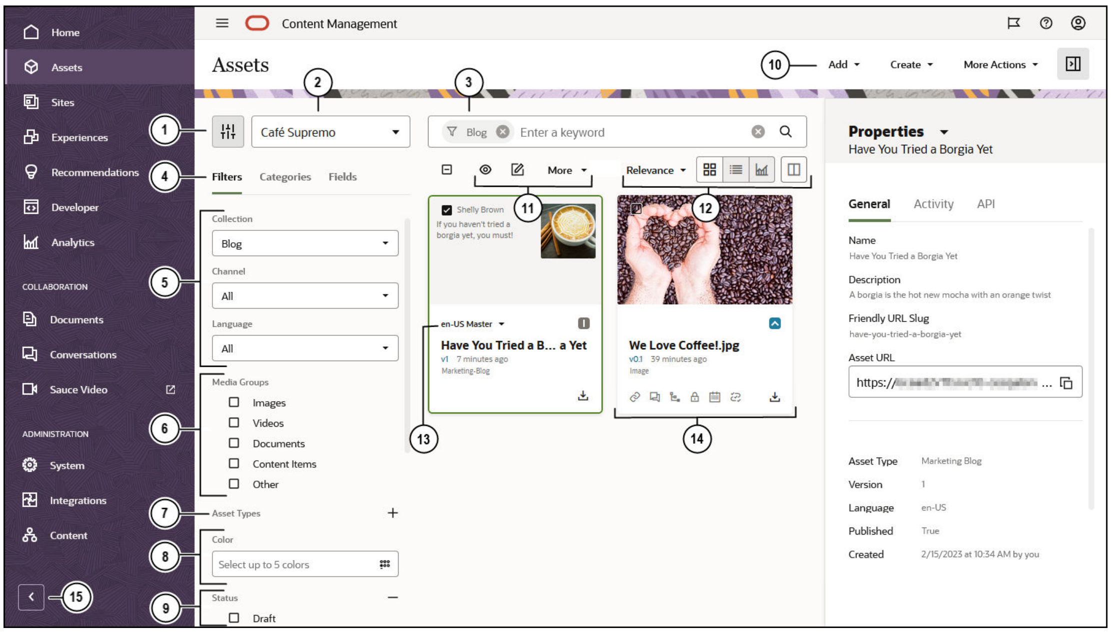
If you're using Oracle Content Management Starter Edition, you have limited asset support:

- Only 5,000 assets for free
- Includes out-of-the-box asset types for images, videos, and files
- Only 5 custom asset types
- No custom renditions (supports automated renditions)
- No support for Video Plus
- No support for translation jobs
- No support for smart authoring
- No support for the Adobe Creative Cloud extension

To increase the number of assets and take advantage of the full feature set, upgrade to the Premium Edition.

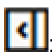
5 Get to Know the Assets Page

Your Assets view is where you manage all the digital assets and content items you need for projects. The features available on the Assets page differ depending on whether you are viewing a *digital asset repository* or a *business asset repository*. Digital asset repositories support publishing and translation. This topic describes the Assets page for a digital asset repository.



To get started, click **Assets** in the left navigation menu.

Callout	Description
1	Click  to hide or show the filter panel. Hiding the panel gives you more room for viewing assets in the content area.
2	Select the repository to use from the drop-down list next to the filter icon.
3	Search for assets using tags or keywords. If smart content is enabled on the repository, after you enter a search term, you'll see recommended keywords under the search box. Click a keyword to add it to your search.
4	By default, you see filters for filtering the assets in the repository by collection, channel, language, media group, asset type, and status. You might see additional filter tabs: • **Categories**—If a taxonomy is associated with the selected repository, you can filter by categories on the Categories tab. Taxonomies provide a hierarchical, folder-like structure of categories. • **Fields**—You can search for standard property values (for example, created by or description) or attribute values from custom asset types on the Fields tab.

Callout	Description
5	Filter by collection, channel, or by language. If you choose a specific collection, for example, you will see only those content items and digital assets that are in that collection. If you leave these options set to All, you'll see all the assets in the repository you chose to use. If an asset in an asset repository is translated into multiple languages, one asset is considered the “master” and the other translated versions are considered secondary. When you filter for a specific language, an asset may be returned in your results that doesn't appear to be in that language. However, there may be a secondary version in that language.
6	Filter by media group, for example, images, documents, or content items.
7	Filter by the type of asset. You see all the asset types available in the selected repository.
8	Filter by color. If smart content is enabled on the repository, you can filter images by color, selecting up to five colors.
9	Filter by status. You can filter by the following status types: approval, publishing, categorization, workflow, lock, collection, or channel target.
10	The menu at the top of the page lists the actions you can take in the *repository*: • **Add**: You can add files into the repository from your computer or files that are already stored in your Documents cloud account or, if your administrator has enabled cloud storage integration, from a third-party cloud storage provider. • **Create**: You can also create a content item by clicking **Create** and then selecting a content type to use from the list. • **More Actions**: Click **More Actions** to see additional views of the repository: Scheduled Publishing, Publishing Jobs, Translation Jobs, Collections, Content Analytics, Archived Assets, and Workflow Tasks (if workflows are associated with the asset repository you're viewing). • : The sidebar panel is described below as it shows asset-specific information after selecting an asset.

Callout	Description
11	After you select at least one asset, the actions bar above the assets shows the actions you can take on the *selected assets*. Depending on what you select, different actions will be available. If you don't see all the actions, click **More**. • (**View**)—View the selected asset. • (**Edit**)—Edit the selected asset. For image or Video Plus assets, you can edit the media or the attributes. For video assets, you can also view subtitles. • (**Upload New Version**)—Upload a new version of the selected digital asset. • (**Download**)—Download a selected asset and store it for use on your local computer. • (**Copy**)—Copy the selected content items. • (**Copy To**)—Copy the selected assets to another repository. • (**Check for Updates**)—Check if the digital asset has updates in the linked Documents file. • **Languages**—Manage languages in a slide-out panel listing all the current translations for an asset and their status, or add a language to an individual asset by completing the content form (showing the fields from the asset type) in the new language. • **Lock**/**Unlock**—Lock or unlock the selected assets and, optionally, their dependents. • **Publish**—Publish the selected assets now or schedule publishing for a future date and time. • **Workflow**—You can review assets with basic out-of-the-box approve/reject workflow, or, if configured, you might be able to take advantage of workflow from Oracle Integration. • **Find**—Find visually similar assets to selected digital assets, or find assets categorized similarly to selected assets. • **Convert**—Convert a digital asset from an out-of-the-box digital asset type (Image, Video, Video Plus, or File) to a custom digital asset type. • **Sidebar** or —Open the sidebar to view additional information about the selected assets: – Analytics – Categories – Channels – Conversation – Inventory – Properties (including activity and previous versions) – Tags and Collections – Workflows • (**Archive**)—Archive the selected assets. • (**Delete**)—Delete the selected assets.
12	You can sort the assets in your view by relevance, name, or by the last date they were updated. You can also toggle between grid view ( ), table view ( ), and performance view ( ). In table view, you can select which columns you'd like to see by clicking .

Callout	Description
13	If the asset is a content item, it might be translated. A list of translated versions is shown when you select the drop-down arrow next to the translation notation on the content item tile. To view all the languages associated with an item, select the item and click **Languages**. A slide-out panel opens, showing you the translated versions of that asset.
14	Each asset tile shows details about the asset. You see the following information: • A preview of the asset. • A list of the asset's languages (described previously). • The asset status: – Published – Approved – Rejected – Draft – Not ready for use (asset includes required fields that haven't been completed) – Translated – In Review • The asset name. Click the name to view the asset. • The asset version. Click the version to see the asset's activity history. • When the asset was last updated. • The asset type associated with the asset. • If a digital asset has been added from Documents, you see . • If the asset has an associated conversation, you see . Click the icon to view the conversation. • If the asset has been recategorized, you see . You must publish the asset for the category changes to appear in publishing channels. • If the asset is locked, you see . • If the asset is scheduled to be published, you see . • If the asset is in workflow, you see . • An icon to download the digital asset (, not shown for content items).
15	Click the arrow to expand navigation to show text for the menu options in the navigation menu or collapse it to show an icon-only navigation menu. Collapsing the menu gives you more room for viewing assets in the content area.

6
Create and Edit Digital Assets

As a digital asset user, you can:

- Take a quick tour about using digital assets (English only)
- Understand Digital Assets
- Add Digital Assets
- Work with Digital Assets on the Assets Page
- Perform Actions While Viewing a Digital Asset
- Edit Digital Assets
- Revoke Access to a Third-Party Cloud Storage Provider
- Use the Adobe Creative Cloud Extension
- Create and Edit Desygner Assets

Add Digital Assets

Adding digital assets is done in much the same way you do for files. You can upload content from your local computer, from the files in your Oracle Content Management account, or, from other sources if enabled by your administrator.

To add digital assets:

1. Add items in one of the following ways:
   - **Add items from the Assets page.**
     On the **Assets** page, select the repository and, optionally, the collection you want to add the items to. Then click **Add** and select an option:
     – **Add from Documents**—Select one or more items from your Oracle Content Management Documents.
       A copy of the item will be made and added to the repository as a new asset and so is listed as version one in the repository, regardless of the version number in Documents. For example, if you select v3 of a document and add it as an asset, it will be listed as v0.1 when viewing the asset in the repository. The asset will include on the asset tile, signifying that the asset is linking to a Documents file. If you change the Documents file, it won't automatically affect the asset. However, you can check the asset for updates and update the asset to the newest version of the Documents file at any time. If you permanently delete the Documents file, the asset remains in place, no longer linked to the Documents file.
     – **Add from this computer**—Select one or more items from your computer.
     – **Add from a third-party cloud storage provider**—If your administrator has integrated other third-party cloud storage providers, and your repository administrator has added the connector to the selected repository, you'll see options to import from those providers. The first time you import from a new

provider, you'll need to sign in. Then you'll be able to select one or more items from your account.
If necessary, you can later revoke access to a provider.

- **Drag and drop content from your desktop computer.**
  On the **Assets** page, make sure you've selected the repository and, optionally, the collection you want to add the items to. Then find content from your local files and drag it into the **Assets** page.
- **Choose content from your Documents list.**
  On the **Documents** page, select items, and choose **Add to Assets**. Select the repository you want to add the items to. You must be a member of a repository to add an item to it. If you want to use a repository but don't see it in the list, you may not be a member of that repository.

  A copy of the item will be made and added to the repository as a new asset and so is listed as version one in the repository, regardless of the version number in Documents. For example, if you select v3 of a document and add it as an asset, it will be listed as v0.1 when viewing the asset in the repository. You can change or delete the original item in Documents and not affect the one that's stored in the repository.

2. In the Add to Repository dialog, you'll see a list of the items you're adding, including the file name, file size, the associated asset type that will be applied to the item, the status, and, if there are data fields in the selected asset type, you'll see an attributes icon ( ). You might need or want to perform the following actions in the dialog before you add the assets:
   - **Select an asset type**—If the file type has more than one associated digital asset type, you can select the appropriate type in the drop-down list; or select multiple items, click **Assign Type**, and select the asset type. If the asset doesn't have any associated asset types available in the selected repository, you'll see "No Types" as the status. You'll need to remove the item before you can add any remaining items.
   - **Edit attribute values**—If the asset is missing some required attribute values, you'll see "Attributes" as the status. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review or publish the asset.
     You might also want to view or edit the attribute values, including the name, description, or language settings, as discussed below.
     – **Edit attributes**—To edit the values, click or select the item and click **Edit Attributes**.
     – **Edit attribute values for multiple assets**—To enter the same attribute value for multiple assets of the same asset type, select the assets, then click **Edit Attributes** (the attributes icon shows the attributes for only a single asset).
     – **Edit the name**—Digital asset file names must include the file extension, so if you remove the extension while editing the name attribute, the extension will be appended to the name you entered when you save the changes. For example, if you upload a file named "rose.jpg" or "flower.jpg" and change the name attribute to "rose", the asset will be named

"rose.jpg" (using the name you entered with the file extension appended to it). If you accidentally enter an incorrect extension while editing the name attribute, the correct extension will be appended after the incorrect extension you entered. For example, if you upload a file named "flower.jpg" and change the name attribute to "rose.png", the asset will be named "rose.png.jpg" (using the name and incorrect extension you entered with the correct extension appended to it).

– **Edit the description**—You can optionally enter a description for the asset.
– **Configure a friendly URL**—If the asset type allows friendly URLs (asset repositories only), enter a friendly item name for the URL.
– **Configure language settings**—By default, the repository's default language is selected. If this asset is in another language, select it. You see only those languages that are set in the repository and don't already include a translated version.
If the asset is stored in an asset repository, the asset is set as translatable by default, but you can make it non-translatable if you want. This option isn't available in business repositories; all assets in business repositories are non-translatable.
– **Add media**—If the attributes include a media reference, you can perform the following actions:
  * To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  * To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.
    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
  * To clear the media item, click .
– **Add a referenced content item**—If the attributes include a content item reference, you can perform the following actions:
  * To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  * To select an existing content item, click and navigate to the desired content item.
  * To clear the content item, click .

- **Assign categories**—If a taxonomy is associated with the repository you're adding the items to, you can assign categories. Select one or more items, and then click **Categories**, or click , then, in the drop-down menu, select **Categories**. To assign categories to this content item, click **Add Category**.
- **Target channels** (asset repositories only)—Target the items to a channel to determine the publishing rules for the items. Select one or more items, and then click **Channels**, or click , then, in the drop-down menu, select **Channels**.
- **Assign tags**—Add keywords that let users find the item quickly. Select one or more items, and then click **Tags and Collections**, or click , then, in the drop-down menu, select **Tags and Collections**. Add the tags for the assets. Press **Enter** after each tag. You can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.
- **Add to collections**—Add the items to a collection within a repository. Select one or more items, and then click **Tags and Collections**, or click , then, in the drop-down menu, select **Tags and Collections**.

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

Work with Digital Assets on the Assets Page

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

When you right-click or select a digital asset you can perform the following actions. Depending on the size of the window, you might need to click **More** to see some of the options.

Task	Description
View the asset	To view the asset in a slide-out panel without leaving the Assets page, click the asset name, choose **View** in the right-click menu, or click in the actions bar. To view the asset in a new tab, press Ctrl and click the asset name. When the asset is open you can also see how the content will look with the different layouts associated with the asset type, and access the editor.

Task	Description
Edit the asset	For image or Video Plus assets, you can edit the media file by choosing **Edit Media** from the right-click menu or the menu. For any digital asset, you can edit the attributes, including the name or description, by choosing **Edit Attributes** from the right-click menu or the menu. If the asset is translatable, you can also change the language assigned to the asset; you see only those languages that don't already include a translated version. For video assets, you can view subtitles by choosing **Subtitles** from the right-click menu or the menu.
Upload a new version	To add a new version of the asset, choose **Upload New Version** in the right-click menu or click in the actions bar. If the image has been localized, you can upload new versions only for the master language, and that new version will be inherited by all the localized versions of the image. If you upload a file with a different name or extension, the new version will keep the original name and update the extension as appropriate. For example, if you're uploading a new version for a file named "rose.png", and the file you upload is named "flower.jpg", the new version will be named "rose.jpg" (keeping the original name of "rose", but updating the extension appropriately to ".jpg").
Download assets	To download a digital asset to your computer, choose **Download** in the right-click menu or click in the actions bar or on the asset tile. You can download only digital assets, not content items.
Copy the asset	To copy the asset to another repository, choose **Copy To** in the right-click menu or click in the actions bar, select the repository you want to copy the asset to, then click **Copy**. You must have the Manager role on the target repository. You can select more than one asset to copy at the same time. Only the current version of each asset will be copied. Repository managers can also copy assets from one repository collection to another.
Check for linked file updates	If the asset was added from Documents, you can check if there are updates to the linked Documents file and update the asset to the latest version of the Documents file. Choose **Check for Updates** in the right-click menu or click in the actions bar. If the linked file has been updated in Documents, click **Update** to update the asset with the changes. To preview the current version of the asset or the updated version from Documents, click next to the version you want to preview. To exclude a file from being updated, click next to the file.

Task	Description
View translated versions of the asset	If the asset is translatable, you can see all the translated versions of the asset by choosing **Manage Languages** in the right-click menu or the **Languages** menu in the actions bar. In the Languages panel, you can translate the asset by clicking **Add Language**. To restrict the asset from being translated, click **Non-translatable**. This action can't be undone, and it removes any existing translations, so be sure you want to make the item non-translatable before you confirm the action.
Translate the asset	If the asset is translatable, you can add a translation for the asset by choosing **Translate** in the right-click menu or the **Languages** menu in the actions bar, and creating a translation job. After creating the job, it will need to be sent to translation by someone with rights to do so.
Lock or unlock the asset	To lock the asset so other users can't edit it, choose **Lock Assets** from the right-click menu or the **Lock** menu. If the asset has already been locked by you, you can unlock the asset by clicking **Unlock Assets**.
Publish or unpublish the asset	To publish the asset and make it available for use in a site, choose **Publish Now** or **Publish Later** from the right-click menu or the **Publish** menu. You can select more than one asset to publish at the same time. If the asset has already been published, you instead see an option to **Unpublish** it.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Choose **Submit for Review** from the right-click menu or the **Workflow** menu. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. You can select more than one asset to submit for review at the same time. • Workflow: Choose **Workflows** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click) to move the asset through workflow. The submission status is shown below the asset preview: • Draft • In Review • Approved • Rejected
Find visually similar assets	To find assets that are visually similar to the selected asset, choose **Find Visually Similar** in the right-click menu or the **Find** menu.
Find similarly categorized assets	If the asset has been categorized, find assets that are assigned to similar categories as the selected asset, by choosing **Find Categorized Similarly** in the right-click menu or the **Find** menu.
Convert assets to a custom asset type	If you have assets that use an out-of-the-box digital asset type (Image, Video, Video Plus, or File), you can convert them to a custom digital asset type. Choose **Convert Type** in the right-click menu or the **Convert** menu.
Convert a standard video to Video Plus	If Video Plus is enabled, you can convert standard videos to Video Plus. Choose **Convert Video** in the right-click menu or the **Convert** menu.

Task	Description
Assign categories to the asset	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by choosing **Categories** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
Target the asset to publishing channels	To target the asset to publishing channels, choose **Channels** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). You can select more than one asset to assign channels to at the same time.
Assign tags and collections	To assign tags and collections to the asset, choose **Tags and Collections** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click).
View the asset's properties	To view the asset's properties, choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile; or choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click); and then click the **Activity** tab.
Archive the asset	If the asset isn't used anymore, but you're not ready to permanently delete the asset, you can archive it. To archive the asset from the repository, choose **Archive** in the right-click menu or click in the actions bar. To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.
Remove the asset	To remove the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar. You can select more than one asset to delete at the same time. If the asset has been published, it will be unpublished before it's deleted, so you must have permission to unpublish the asset.
View analytics	To view the asset's analytics, click , then, in the drop-down menu, select **Analytics**.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset or sites that use this asset, click , then, in the drop-down menu, select **Inventory**.

Perform Actions While Viewing a Digital Asset

While viewing an asset, you can perform the following actions.

Task	Description
View the published version	If the asset has been published, but has a newer draft version, you see the draft version by default. You can switch to the published version using the status icon drop-down list just above the asset preview.
View the asset's renditions	To view and manage renditions of the asset, select a rendition from the drop-down list just above the asset preview, or click , then, in the drop-down menu, select **Renditions**.
Preview the asset in layouts	If the asset has a layout associated with the underlying asset type, you can view the asset in those layouts by clicking **Preview in Layout**. By default you see the asset in the content form view—the field names and values from the asset type. • If there are other layouts or site pages configured for the associated asset type, you can preview them by selecting a layout or site page from the drop-down list. • By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking . • To show the ruler and manually change the device size, click , then move the handles to change the height and width.
Change the magnification of the asset	To change the magnification of the asset, move your cursor to the bottom of the window and the zoom controls appear.  • —Click to view the asset at its actual size. • —Click to view the asset at the width of the viewing pane. • —Click to view the entire image, video, or page. • —Click to view the asset full-screen. Click again or press Esc to exit full-screen. • —Click to zoom out. • —Slide to view the asset at the desired magnification. • —Click to zoom in.
Control a standard video asset	If the asset is a standard video, use the control bar to do the following: • Play • Pause • Skip • Adjust volume

Task	Description
Control a Video Plus asset	If the asset is a Video Plus asset, use the control bar to do the following: • Play • Pause • Skip • Adjust volume • Skip forward 10 seconds • Skip back 10 seconds • Select video resolution quality • Speed up or slow down playback speed
Edit the asset	To edit the media file for the asset, click **Edit Media**. • Edit an image. • Edit a video.
Publish the asset	To publish the asset and make it available for use in a site, choose **Publish Now** or **Publish Later** from the **Publish** menu.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Click **Submit for Review**. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. • Workflow: Choose **Workflows** from the drop-down menu in the sidebar (click) to move the asset through workflow.
Download the asset	To download the asset to your computer, click **Download**.
Upload a new version of the asset	To add a new version of the asset, click **More Actions**, then select **Upload New Version**. If the asset has been localized, you can upload new versions only for the master language, and that new version will be inherited by all the localized versions of the asset. If you upload a file with a different name or extension, the new version will keep the original name and update the extension as appropriate. For example, if you're uploading a new version for a file named "rose.png", and the file you upload is named "flower.jpg", the new version will be named "rose.jpg" (keeping the original name of "rose", but updating the extension appropriately to ".jpg").
Add annotations to the asset	To add an annotation to the asset, click , select an area or click where you want to add the annotation, then enter your comment in the text box, and click **Post**.
View annotations on the asset	To view annotations on the asset, click . When you click an annotation on the asset, the annotation note will get focus in the conversation.
Close the asset	To close the asset, click **Close**.
View the asset's properties	To view the asset's properties, click , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile or click **Properties**, and then click the **Activity** tab.

Task	Description
View analytics	To view the asset's analytics, click , then, in the drop-down menu, select **Analytics**.
View the asset's attributes	To view and edit the attributes for the asset, click , then, in the drop-down menu, select **Attributes**.
View the asset's categories	If a taxonomy is associated with the repository the asset is stored in, you can view and manage the categories assigned to the asset by clicking , then, in the drop-down menu, selecting **Categories**. **Note:** Categories are available only in Oracle Cloud Infrastructure, not Oracle Cloud Infrastructure Classic.
View the channels the asset is targeted to	To view and manage channels the asset is targeted to, click , then, in the drop-down menu, select **Channels**. Add or remove channels as necessary.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset or sites that use this asset, click , then, in the drop-down menu, select **Inventory**.
View the tags and collections assigned to the asset	To view and manage the tags and collections associated with the asset, click , then, in the drop-down menu, select **Tags and Collections**. Add or remove tags and collections as necessary.

Edit Digital Assets

You can edit your digital assets in several ways:

- Edit an Image
- Edit a Video
- Edit Attributes
- View or Edit Subtitles
- Assign Asset Categories
- Tag Assets
- Assign Publishing Channels
- Refresh Assets Added from Documents
- Convert a Digital Asset to a Custom Asset Type
- Convert a Standard Video to Video Plus

- Manage Image Renditions
- Revert to a Previous Version

Edit an Image

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

If there is more than one version of an image, when viewing the image, you can switch between the latest draft version and the last published version using the drop-down menu next to the image name. To edit a published image, you'll need to save it as a new revision or as a new asset. If you already have a draft and you're working in Site Builder, the draft will automatically open in the editor; if you're viewing the asset from the Assets page, you'll need to switch to the draft before you can edit the image.

To edit an image:

1. On the Assets page, select the image and choose **Edit Media** from the right-click menu or the menu, or, in Site Builder, click the menu icon in the component you want to edit, choose **Settings**, and then click . If you're in Site Builder editing a component that allows multiple images (like a gallery), you need to click **Images**, then click the image you want to edit to see the edit icon ().
2. Edit the image with any of the following actions:
   - To crop the image, click **Crop**. Select one of the predefined image ratios in the cropping toolbar, or drag the cropping handles on the image as desired. When you're satisfied, in the cropping toolbar, click **Crop**.
   - To rotate or flip the image, click **Rotate**. In the rotation toolbar, enter a custom rotation degree, use the buttons to rotate the image left or right, or select whether to flip the image horizontally or vertically.
   - To add a watermark to the image, click **Watermark**. Add text to the image, changing the text size, style, color, and opacity as desired with the watermark tools.
   - To change the image format, click **Options**, then select a new format from the **Format** drop-down list.
   - To change the background color, click **Options**, then select an option from the **Background Color** drop-down menu.
   - If you're editing a .jpg or a .webp (available on Google Chrome browsers), you can change the image quality to create a smaller file size. Click **Options**, then enter the new percentage in the **Quality** box.
   - To undo or redo your change, click or . To remove all changes you made, click **Reset.**
   - To change the magnification of the image, use the zoom controls (− +).

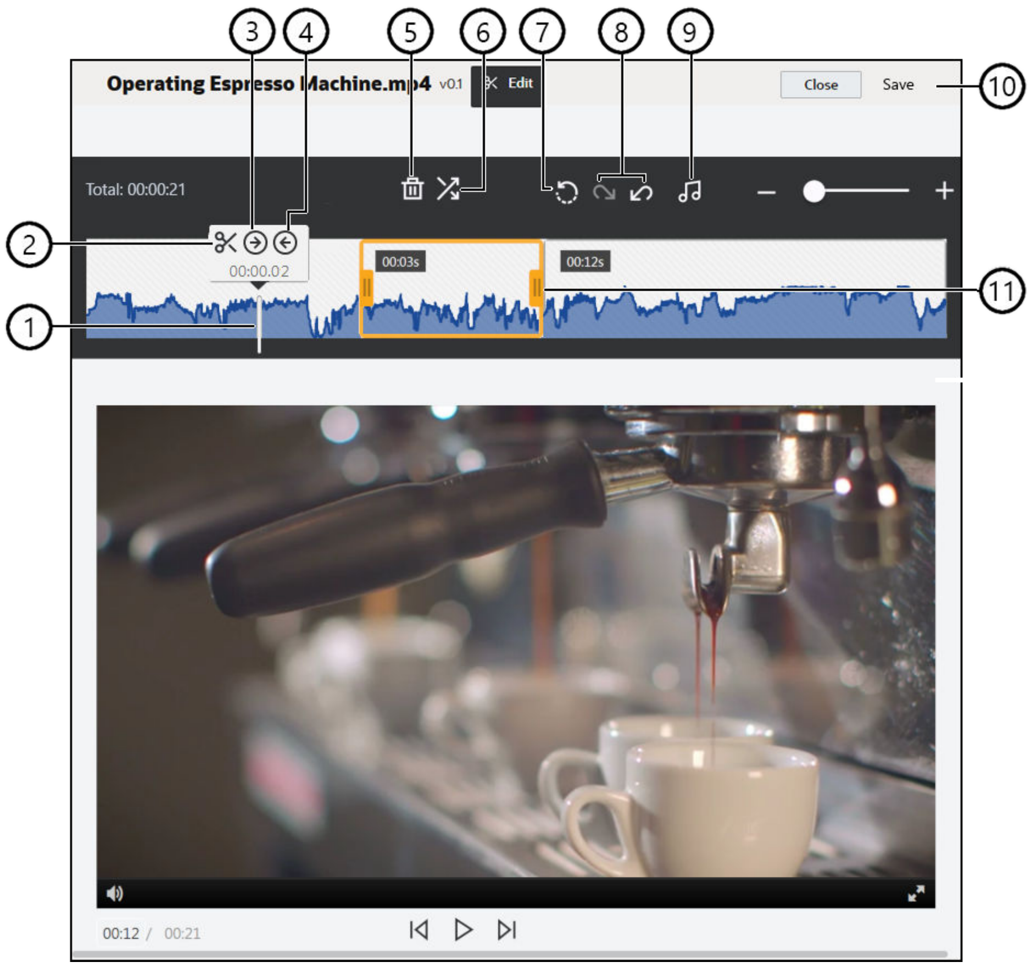
3. To save your changes, click **Save**, then select whether you want to save as a new rendition (asset repositories only) or as an entirely new asset, or, if you're editing a custom rendition, you can also save and replace the image.

Edit a Video

With Video Plus enabled, you can edit Video Plus assets directly in Oracle Content Management, trimming videos and setting clips to fade in or out.

> **Note:**
>
> Video Plus isn't available in business repositories.

Here's what you see when you edit a Video Plus asset:



Item	Description
1	Move the **time marker** to the point on the timeline where you want to make your edit. All edits happen on the video timeline. You position the time marker by clicking on the timeline at the point you want to edit, or click-and-drag the time marker on the timeline. You can also use the right arrow key to advance the time marker 1 second forward or the left arrow key to go back 1 second. Use **Alt + right arrow** to advance 10 seconds and **Alt + left arrow** to go back 10 seconds.
2	**Split** cuts a timeline into segments.
3	**Set In** designates the position of the time marker as the beginning of the video.
4	**Set Out** designates the position of the time marker as the end of the video.
5	**Delete** removes a selected segment from the timeline.
6	**Fade In/Out** smooths the start and finish of a video or the transitions from one segment to the next by fading segments in or out by the specified length of time, in seconds. An icon ( ) is displayed on the timeline to indicate a fade is being used and on what segment.
7	**Reset** removes any edits you've made to a video as long as you haven't saved it. Clicking **Close** without saving a copy cancels any edits you've made.
8	**Undo** sequentially removes edits you've made from the timeline, and **Redo** sequentially adds edits you've removed back to the timeline.
9	**Select Audio** lets you choose which audio track to use if the video has more than one. The selected audio track is shown on the timeline.
10	Click **Save** to select whether to save the edited video as a new asset , a rendition of the asset, or a new version of the original asset.
11	Click-and-drag either side of the **clip frame** to the position you want and save to quickly trim the first or last part of the video.

Editing a Video

1. To begin, click **Assets** in the side navigation menu and select the repository holding the Video Plus asset you want to edit.
2. Select the Video Plus asset and choose **Edit Media** from the right-click menu or the menu.
   The video is displayed with a timeline and video editing tools. If the video has a audio track, it's shown on the timeline. If there's more than one audio track, you can click **Select Audio** and choose the audio track to use.
3. Make your edits using the editing tools as described above.
4. Click **Save** and select whether you want to save the edited video as a new asset, a rendition of the asset, or a new version of the original asset. If saving as a rendition, enter a name for the rendition. The name cannot exceed 28 characters.

   > **Note:**
   >
   > Remember, you can only edit the current version of an asset. If you edit out a segment of a video that you may want to use later for a different video, you will want to save the edited video as a new asset so you can use the original asset for additional videos.

5. Click **OK**.

Edit Attributes

Digital asset attributes include the name and description, the language (if the asset is translatable), and any custom attributes defined in the digital asset type by your content administrator.

To view the asset's attributes, open the asset, click , then, in the drop-down menu, choose **Attributes**.

To edit the attribute values, including the name or description, click **Edit**.

- **Edit the name**—Digital asset file names must include the file extension, so if you remove the extension while editing the name attribute, the extension will be appended to the name you entered when you save the changes. For example, if you upload a file named "rose.jpg" or "flower.jpg" and change the name attribute to "rose", the asset will be named "rose.jpg" (using the name you entered with the file extension appended to it).
  If you accidentally enter an incorrect extension while editing the name attribute, the correct extension will be appended after the incorrect extension you entered. For example, if you upload a file named "flower.jpg" and change the name attribute to "rose.png", the asset will be named "rose.png.jpg" (using the name and incorrect extension you entered with the correct extension appended to it).
- **Edit the description**—You can optionally enter a description for the asset.
- **Configure a friendly URL**—If the asset type allows friendly URLs (asset repositories only), enter a friendly item name for the URL.
- **Configure language**—If the asset is translatable, you can set the language. By default, the repository's default language is selected. If this asset is in another language, select it. You see only those languages that are set in the repository and don't already include a translated version.
- **Add or edit media**—If the attributes include a media reference, you can perform the following actions:
  - To edit the media or media attributes, click , and choose an option.
  - To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  - To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.

  - To clear the media item, click .
- **Add or edit a referenced content item**—If the attributes include a content item reference, you can perform the following actions:
  - To edit the content item, click .
  - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  - To select an existing content item, click and navigate to the desired content item.
  - To clear the content item, click .
- When you're done, click **Save**.

View or Edit Subtitles

If your repository administrator enabled smart content on the repository and your instance is configured to do so, Oracle Content Management processes uploaded .mp4 and .mkv videos and generates transcripts for them for the supported languages.

To view the transcript, select the video and choose **Subtitles** from the right-click menu or the menu.

If the video is done processing, you'll see the transcript. The video starts playing automatically, and the words are highlighted in the transcript as the video plays.

The Subtitle Editor has two tabs:

- Preview Tab
- Edit Tab

Preview Tab

On the **Preview** tab you can perform the following actions.

To perform this task	Do this
Pause the video and subtitles	Click .
Play the video and subtitles	Click .
Restart the video and subtitles	Click .
Increase the font size	Click A+.
Decrease the font size	Click A−.
Search the transcript	In the search box, enter text, and then press Enter or click the down arrow. The result will be highlighted in the transcript, and the video will skip to that line. Use the up and down arrows to see the previous or next matches.

To perform this task	Do this
Skip to a line in the transcript or a part of the video	Click the line in the transcript to skip to that part of the video. Use the video controls to skip to a part of the video and the line will be highlighted in the transcript.

Edit Tab

The **Edit** tab shows the video transcript, with a breakdown of the start and end times for each caption. You can edit the transcript, changing the caption text or timing, and adding or removing captions.

On the **Edit** tab you can perform the following actions.

To perform this task	Do this
Pause the video and subtitles	Click .
Play the video and subtitles	Click .
Restart the video and subtitles	Click .
Search the transcript	In the search box, enter text, and then press Enter or click the down arrow. The result will be highlighted in the transcript, and the video will skip to that line. Use the up and down arrows to see the previous or next matches.
Skip to a line in the transcript or a part of the video	Click the line in the transcript to skip to that part of the video. Use the video controls to skip to a part of the video and the line will be highlighted in the transcript.
Edit a caption	Click , and edit the caption. • If necessary, edit the start and end times. • Edit the text. • To italicize the caption, click . • To change the case of the caption (to all upper case or all lower case), click . • To save your changes, click . • To cancel your changes, click .
Delete a caption	Click .
Add a caption	Place your cursor where you want to add the caption (under an existing caption), and you'll see an option to **Insert Caption**. Edit the caption as described above. If you click , before saving the new caption, the caption will be deleted.
Undo the last saved change	Click .
Redo the last saved change	Click .

To perform this task	Do this
Apply italics to caption text	Click next to the caption you want to italicize, click , then click .
Change the case of the caption text	Click next to the caption for which you want to change case, click , then click .
Save your changes	When you're done with all your changes, click **Save**.

Supported Languages and Dialects

The following languages are supported for generated transcripts:

- English
- Spanish
- Portuguese
- French
- German
- Italian
- Hindi

Refresh Assets Added from Documents

For an asset that was added from Documents, you can check if the linked Documents file has been updated, and then refresh the asset to the latest version.

To check for updates and refresh assets to the latest versions of the Documents files:

1. Select one or more linked assets.
   You can quickly find all linked assets by selecting **Linked** in the Filters panel.

   To check for updates for a localized version of an asset, select the language in the drop-down list on the asset tile and select the asset.

2. Choose **Check for Updates** in the right-click menu or click in the actions bar.
   For assets that can be updated, you see the following information:

   - The asset name and language. To preview the asset, click .
   - The current state of the asset. For example, you'll see what version of the document the asset was created from or that the asset itself has been edited. If the asset has been edited, updating the asset will get rid of the asset updates and replace the asset with the current version of the linked Documents file.
   - The current Documents file and version. To preview the document, click .
   - An icon ( ) to exclude the file from being updated.

   For assets that can't be updated, you see the following information:

- The asset name and language.
- The reason the asset won't be updated. There are several reasons an asset might not be updated:
  - The asset is already in sync with the linked Documents file.
  - The asset is locked.
  - You don't have update permission for the asset's associated asset type.
  - You don't have at least Viewer permission for the linked Documents file.
  - You selected a localized version of an asset (in the language drop-down list on the asset tile), and the associated asset type doesn't allow separate native media files for each language. In this case, only the master version of the asset can be updated.
  - The updated media file in Documents isn't supported by the asset's associated asset type.

3. When you're done reviewing the updates, click **Update** to refresh the assets to the latest versions of the Documents files.

Convert a Digital Asset to a Custom Asset Type

You can convert a digital asset from an out-of-the-box digital asset type (Image, Video, Video Plus, or File) to a custom digital asset type.

1. Click **Assets** in the side menu to open the assets page.
2. Select or right-click the assets you want to convert, then, in the **Convert** menu, choose **Convert Type**.
3. In the Convert Asset Type dialog, you'll see a list of the items you're converting, including the file name, the current source asset type, the target asset type that will be applied to the item, the status, and, if there are data fields in the selected asset type, you'll see an attributes icon ( ). You might need or want to perform the following actions in the dialog before you convert the assets:
   - **Select a new asset type**—If the file type has more than one custom digital asset type that it can be converted to, you can select the new type in the drop-down list; or select multiple items, click **Assign Type**, and select the asset type. If the asset doesn't have any associated asset types available to convert to in the selected repository, you'll see "No Types" as the status. You'll need to remove the item before you can convert any remaining items.
   - **Edit attribute values**—If the asset is missing some required attribute values, you'll see "Attributes" as the status. You might also want to view or edit the values. To edit the values, click or select the item and click **Edit Attributes**. To enter the same attribute value for multiple assets of the same asset type, select the assets, then click **Edit Attributes** (the attributes icon shows the attributes for only a single asset).

Convert a Standard Video to Video Plus

> **Note:**
>
> Video Plus isn't available in business repositories.

Video Plus assets provide a rich video management and delivery experience, including all the standard video features plus advanced capabilities for optimized streaming, video editing, automatic transcoding and conversion, and more responsive playback options.

If Video Plus is enabled, existing standard videos are not automatically converted to Video Plus assets. You can convert standard video assets to Video Plus assets, though, either from the assets page or when viewing a standard video.

1. Click **Assets** in the side menu to open the assets page.
2. Select or right-click the standard video or videos you want to convert, then, in the **Convert** menu, choose **Convert Video**.

> **Note:**
>
> If you select a video that has been published, or an asset that is not a video asset, such as an image or document, then **Convert Video** will not be an option.

Videos converted to Video Plus stay at the same revision number as the original standard video version.

If a Video Plus asset is not published and has a previous revision that is still a standard video, selecting the standard video revision to make it current results in a newly created revision that is converted to Video Plus.

You can also convert a standard video asset when viewing it.

1. Select a standard video asset on the **Assets** page and click . The standard video asset is displayed.
2. Click **Convert** in the banner menu.

Manage Image Renditions

Your images are likely used in multiple channels (mobile, tablet, web, etc.). Each channel might have different format, quality, and size requirements. You can use different *renditions* of an image to accommodate each channel's requirements.

When you add an image to a repository, several renditions are automatically generated by Oracle Content Management. By default, you'll get *system renditions*—large, medium, small, and thumbnail. You might also have *required renditions*. Required renditions are produced when your content administrator defines a rendition policy and associates it with the digital asset type used for the image.

Note:

- Image renditions aren't available in business repositories.
- Images aren't upsized, only downsized, to create the automatically generated renditions. For example, if you add an image that is 100px by 100px, which is smaller than the defined thumbnail, all the automatically generated renditions will be 100px by 100px.

You can use these automatically-generated renditions as-is, edit them, or create new custom renditions to suit your needs.

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

You can perform the following actions in the Renditions panel:

Task	Description
View a rendition	Click it.
Upload a new version of the original image	Next to the original image, click ••• then select **Upload New Version**. Not available for localized versions of images.
Download a rendition	Next to the rendition you want to download, click •••, then select **Download**.
Edit a rendition	Next to the rendition you want to edit, click •••, then select **Edit**. The rendition opens in the media editor. Not available for localized versions of images.
Add a new custom rendition	Click **Add Rendition**. To add a rendition, the asset must be unpublished. When you add a rendition, you can edit its name to specify the purpose of the rendition. If the image has been localized, you can upload renditions only for the master language. Not available for localized versions of images.
Delete a custom rendition	Click •••, then select **Delete**. You can't delete a published asset. You must unpublish the asset before you can delete it. Not available for localized versions of images.
Copy the URL of a published rendition	Click ••• , select **Copy URL**, then click to copy the URL to the clipboard. From here, you can also open the rendition in a new tab by clicking . Not available for localized versions of images.

Revoke Access to a Third-Party Cloud Storage Provider

If your administrator integrated other third-party cloud storage providers, and you signed into your account to add assets from the provider, there might come a time when you want to revoke access to the provider.

To revoke access to a third-party cloud storage provider:

1. On the **Assets** page, click **Add**, and then select **Manage Sources**.
2. In the list of all your saved source access, click **Revoke** next to the provider you want to disconnect from.

Use the Adobe Creative Cloud Extension

You can use the assets stored in Oracle Content Management in your Adobe Creative Cloud applications and save your Adobe Creative Cloud images as assets in Oracle Content Management.

The extension is available for Adobe Creative Cloud applications (Photoshop, Illustrator, InDesign, Premiere Pro, After Effects, Animate, and Audition) 2018 and higher. It can be downloaded from the Download Apps page in the Oracle Content Management web application.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, the Adobe Creative Cloud extension isn't supported. To take advantage of the full feature set, upgrade to the Premium Edition.

Feature Overview

Depending on the Adobe application you use, you'll access the extension through different menus, and you'll have access to different features. Here's a description of some of the features, followed by a table showing which features are available in each of the applications.

- **Link assets**—Link assets to the current project.
- **Embed assets**—Copy the assets to the current project.

- **Edit assets**—Drag assets from the Oracle Content Management panel to the application's canvas, editor, or file list.
- **Upload assets**—Drag assets from Windows File Explorer, Mac Finder, or the application panel to the Oracle Content Management panel.
- **Use workflows**—Review, initiate, and respond to workflows.
- **Use Video Plus**—
  - Convert standard video assets to Video Plus assets.
  - To play the Video Plus film strip, hover over the thumbnail.
  - To view the full video in the extension, right-click the asset, and select **Video player**.

> **Note:**
>
> You can only edit the current version of an asset. Once you have finished editing a Video Plus asset, you can save it as a new asset, or as a revision of the original asset. If you edit out a segment of a video that you may want to use later for a different video, you'll want to save the edited video as a new asset so you can use the original asset for additional videos.

Application	Link Assets	Embed Assets	Edit Assets	Upload Assets	Use Workflows	Use Video Plus
Photoshop	Image assets	Image assets	Image assets	Image assets	Yes	No
Illustrator	Image assets	Image assets	Image assets	Image assets	Yes	No
InDesign	Image assets	Image assets	Image assets	Image assets	Yes	No
Premiere Pro	Image, video, and audio assets	No	Image, video, and audio assets	Image, video, and audio assets	Yes	Yes
After Effects	Image, video, and audio assets	No	Image, video, and audio assets	Image, video, and audio assets	Yes	Yes
Animate	Image, video, and audio assets	No	Image, video, and audio assets	Image, video, and audio assets	Yes	No
Audition	No	Video and audio assets	Video and audio assets	Video and audio assets	No	No

Install the Extension

The extension is installed for *all* users on the machine, which requires administrative privileges.

To install the extension:

1. In the Oracle Content Management web application, open your user menu, and click **Download Apps**.
2. Under Oracle Content Extension for Adobe, click **Download**.
3. Run the installer as a user with administrative privileges.
4. In the Adobe application, open the **Extensions** menu. This is a submenu accessed from another menu, such as Window. The location of the menu varies, depending on the application you're using.
5. Select **Oracle Content** on the extension list. A web browser window will open, showing a sign-in page.
6. Sign in with your account name and password. If you have multiple accounts, select the one you want to use.
7. Confirm that you want to open Oracle Content.
   If you're not signed in automatically, in the web application, click **Copy Sign-in Key** and paste the value into the box in the dialog.

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

Customize the Extension

You can change how assets are filtered and other usage details. Click , and then select **Preferences**.

> **Note:**
>
> In Audition, the extension options (Preferences, Help, About) are available via the command bar.

You can perform the following tasks:

Task	Description
Change the account used	Select **Accounts**, and then select a different account from the list.
Add an account	Select **Accounts**, click + and enter the URL for the account you're adding. When you click **Save** you must enter your user name and password to validate the account.
Remove an account	Select **Accounts**, and select the account you want to remove, then click −. Accounts with a lock by them were added using the desktop client and must be removed using the desktop client.

Task	Description
Specify how you want changes to assets to be handled	You can automatically upload any changes to assets or you can handle that manually. For example, if you have an asset linked to a current project and you make local changes to that asset, when the asset is saved, it can be automatically updated in the project.
Manage the list of file extensions that are treated as projects	Select Projects, and then edit the list of project file extensions. Separate each file extension with a semi-colon (;), and don't include the period (.) before the extension.

Use the Extension

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

To open the extension and sign in:

1. In the Adobe application, open the **Extensions** menu. This is a submenu accessed from another menu, such as Window. The location of the menu varies, depending on the application you're using.
2. Select **Oracle Content** on the extension list. A web browser window will open, showing a sign-in page.
3. Sign in with your account name and password. If you have multiple accounts, select the one you want to use.
4. Confirm that you want to open Oracle Content.
   If you're not signed in automatically, in the web application, click **Copy Sign-in Key** and paste the value into the box in the dialog.

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

You can perform different actions in different areas of the extension. Select a topic to get started:

- General Tasks
- Assets View
- Documents View
- Links View
- Attributes
- Languages
- Renditions

General Tasks

You can perform the following general tasks in the extension:

Task	Description
Select a view	• **Assets** view—In Assets view you can browse or search for assets, and place them into the Adobe Creative Cloud application. • **Documents** view—In Documents view you can view and manage your Oracle Content Management files and folders.. • **Links** view—In Links view you can see a list of assets that are already linked to the current project. **Note:** Links view isn't available in Audition.
Filter by item type (Documents view only)	Click , and then, in the item type menu, select the type of items you want to view (all, yours, shared, or favorites).
Sort the item list	Click , and then, in the sort menu, sort by relevance, name, or last updated.
Change the way the item list is displayed	Click , and then, in the view menu, select table view or grid view.

Assets View

You can perform additional tasks in Assets view:

Task	Description
Select a repository	Select a repository from the drop-down list. Use the search field to find specific repositories.

Task	Description
Filter the assets	To filter, click . • Filter assets by collection, and dynamic collections are signified by), publishing channel, asset type, color (select up to five colors), approval status, whether the asset is in workflow, lock status, and whether the asset is linked to a Documents file. If there are taxonomies associated with the repository, you can also filter by whether the asset has been recategorized. **Note:** Standard collections are signified by before their names, and dynamic collections are signified by . • If there are taxonomies associated with the repository, you'll see the **Categories** tab. Click this tab to search and filter by category. By default **Include All Children** is enabled so the filter results will display all images of the selected category and any subcategory. Deselect this option to limit the list exclusively to those images in the selected category. • Search for standard property values (for example, created by or description), attribute values from custom asset types, or camera data for images created with a camera on the **Fields** tab. – To search standard property values, select **All** from the **Asset Type** menu, select a property from the **Field** menu, select an **Operator**, enter a value to search for, and then press Enter. – To search attribute values, select an asset type from the **Asset Type** menu, select an attribute from the **Field** menu, select an **Operator**, enter a value, and then press Enter. – To search for camera data (such as where the picture was taken or by whom), the digital asset image must have been created with a camera, whether that's an actual camera or a device like a phone, laptop, or webcam. Filter by camera data as you would any other attribute. – To add more filters, click **Add**. Additional filters are additive, as if there was an "or" between the filters. – To clear the query parameters, click **Clear**. • To remove a filter, in the search bar, click next to the filter. • To pin the filter options to the assets view, click .
Search for assets	To search, click . • If smart content is enabled on the repository, Oracle Content Management also searches tags that are automatically applied to images, and, after you add a search term, you'll see recommended keywords under the search box. Click a keyword to add it to your search. This brings images tagged with both words closer to the top of the result list and displays additional images tagged with the added keyword. • To find images similar to another image, right-click an image, and then click **Find Visually Similar**. • To find assets categorized similarly to another asset, right-click as asset, and then click **Find Categorized Similarly**. • To pin the search criteria to the assets view, click .

Task	Description
View asset information	Hover over an asset to view the following information such as name, asset type, version, language, and icons representing the asset's status. • The asset name. • The asset type associated with the asset. • The asset version. • The asset language. • If the asset has been added from Documents, you see . • If the asset has been recategorized, you see . You must publish recategorized assets for the category changes to appear in publishing channels. • If the asset is locked, you see . • If the asset is in workflow, you see . • The asset's status.
Open a project	To open a project, right-click it, and then select **Open Item**. You can control which file extensions are treated as projects in Preferences.
Switch between open projects	You can see all projects you have open in the same instance, regardless of their parent repositories, by clicking at the top right of the extension. Each project lists the project version. Projects that have unsaved changes are indicated with "(*)". Hover your mouse over a project to see what repository it's stored in.
Link the asset to the current project	Right-click the asset, and then select **Link Asset**. This option isn't available for Audition or if the asset is locked by another user. You can also link an asset by dragging and dropping the asset or clicking the appropriate icon at the bottom of the Asset view.
Move the asset through basic review	If the asset requires review, click **Submit for Review**. If the asset is already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. If workflows have been assigned to the repository you're viewing, use workflows instead of basic review.
Lock or unlock the asset	You can lock an asset so that no other user can edit the asset or add new versions. Right-click the asset, and then select **Lock Asset**, or, if you have previously locked the asset, select **Unlock Asset**.
Edit the asset's name, description, or attributes	You can edit the asset's name, description, or attribute values. Right-click the asset, and then select **Edit Attributes**. Edit values as necessary.
Convert an asset to a custom asset type	If the asset is based on an out-of-the-box digital asset type (Image, Video, Video Plus, or File), you can convert it to a custom digital asset type. Right-click the asset, and then select **Edit Attributes**. Choose a custom digital asset type, and then click **Save**.
Save a project as a new version	Right-click the project, and then select **Save as New Version**, or click at the bottom of the extension.
Reset changes made to a project	Right-click the project, and then select **Download Latest Version**, or click at the bottom of the extension. Downloading the latest version of the project overwrites any changes you've made.

Task	Description
Upload a new asset or a new version of an asset	Right-click the asset, and then select **Upload Version from Selected Layer** or **Upload Version from Selected Image**. This option isn't available if the asset is locked by another user. When uploading a *new* asset, it will be uploaded to the repository you're viewing. If you've selected any categories, collections, or channels, they'll be applied automatically to the asset. For new assets, you must also complete the following steps: 1. Edit the name and description as necessary. 2. Choose an asset type to apply to the file. 3. By default, the repository's default language is selected. If this asset is in another language, choose it. The languages shown are those that are allowed in the repository and haven't yet been used for the item. 4. By default, the asset is set as translatable. If you don't want the item to be translatable, select **Non-translatable**. 5. If the asset includes attributes, enter attribute values as necessary. 6. Click **Save**.

Task	Description
Refresh an asset added from Documents	For an asset that was added from Documents, you can check if the linked Documents file has been updated, and then refresh the asset to the latest version. You can quickly find all linked assets by selecting **Linked** in the filters panel. To check for updates and refresh an asset to the latest versions of the Documents file: 1. Right-click the asset, and choose **Check for Updates**. 2. If the asset can be updated, you see the following information: • The asset name. • The synchronization status. • The current state of the asset. For example, if the asset has been edited, updating the asset will get rid of the asset updates and replace the asset with the current version of the linked Documents file. • The current Documents file and version. To refresh the asset to the latest version of the Documents file, click **Update**. If the asset can't be updated, you see the reason: • The asset is already in sync with the linked Documents file. • The asset is locked. • You don't have update permission for the asset's associated asset type. • You don't have at least Viewer permission for the linked Documents file. • You selected a localized version of an asset, and the associated asset type doesn't allow separate native media files for each language. In this case, only the master version of the asset can be updated. • The updated media file in Documents isn't supported by the asset's associated asset type. To check for updates for a localized version of an asset, do so from the asset's Languages tab. Open the asset, click , and then select **Languages**.
Add a translation to an asset	To add a translation: 1. Right-click the asset, and choose **Manage Languages**; or open the asset, click , and then select **Languages**. 2. Click +. 3. Edit the name and description as necessary. 4. Choose a language for the asset. The languages shown are those that are allowed in the repository and haven't yet been used for the item. 5. If the associated asset type allows a separate native media file for each language, click **Add**, then select whether to copy the file from an existing language or add a new media file from the selected layer or the selected image. 6. If the asset includes attributes, enter attribute values as necessary. 7. Click **Save**.

Task	Description
Set asset as translatable or not-translatable	Right-click the asset, and then select **Make Item Translatable** or **Make Item Non-Translatable**. When an item is designated as non-translatable, the option to add a language won't appear on the right-click menu. If you change an item to non-translatable and it has existing translations, all translations are deleted and only the master language version remains.
Delete the project or asset	Right-click the project or asset, and then select **Delete Item** or **Delete Asset**.
View the asset in the web	Right-click the asset, and then select **Open in the Web**, which opens the asset in a browser.
View or edit attributes	To view the attributes associated with an asset, right-click the asset, or open the asset and click , and then select **Attributes**. To edit the attributes, click .
View categories	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by opening the asset, clicking , and then selecting **Categories**. Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
View channels	To target the asset to publishing channels, open the asset, click , and then select **Channels**. To select a channel, click the search bar, and then enter a channel name or select a channel.
View collections	To view the collections an asset is a part of, open the asset, click , and then select **Collections**. To select a collection, click the search bar, and then enter a collection name or select a collection.
View translations	To view and manage all the translations for an asset, open the asset, click , and then select **Languages**.
View video	If you're viewing a video asset, open the asset, click , and then select **Player**.
View properties	To view asset properties, such as version, file size, and whether the asset has been published, right-click the asset, or open the item and click , and then select **Properties**. The properties also show the asset's language. If the asset is available in more than one language, you can view the properties for another language, by selecting a new language in the language drop-down list. If the digital asset image was created with a camera, whether that's an actual camera or a device like a phone, laptop, or webcam, you'll also see camera data (expand to view). The device embeds this data in the image file. It includes information such as the type of device, who took the picture, the time and date it was taken, where it was taken (GPS location), and camera information such as shutter speed, aperture, and lens information. This information can help you understand how the image was captured and, if you need to retake the picture, how to recreate or improve the image.

Task	Description
Switch version	The asset's version is shown with its properties. If the asset has multiple versions, you can switch between versions by clicking next to the version number and selecting a new version. To make previous version current, view the previous version, and then click **Make this version current** under the asset status. If the asset type associated with the previous version isn't the same as the asset type associated with the current version, then you won't see the option to make the previous version current.
View renditions	To view all the system and custom **renditions** associated with an asset, right-click the asset, or open the asset and click , and then select **Renditions**.
View tags	To assign tags to the asset, open the asset, click , and then select **Tags**.
View workflows	If workflows have been assigned to the repository you're viewing, you can view the workflows in the extension. To view workflows, open the asset, click , and then select **Workflows**.

Documents View

Documents view enables you to view and manage your Oracle Content Management files and folders.

You can perform additional tasks in Documents view:

Task	Description
Create a folder	To create a folder, click , enter a name and optionally a description, then click **Save**.
Navigate to a folder in the breadcrumb	At the top of the Documents view you see the breadcrumb (the folder path). Click a folder in the path to navigate to that folder.
Search for files or folders	To search for files or folders, next to , enter your search term, and press Enter. By default, you search the folder you're viewing. To search all folders, click , and remove the **Current Folder** criteria. Right-click a search result to perform actions on the file or folder. In addition to other actions, you can open the item's containing folder.
Open a project	To open a project, right-click it, and then select **Open Item**. You can control which file extensions are treated as projects in Preferences.
Switch between open projects	You can see all projects you have open in the same instance, regardless of their parent repositories, by clicking at the top right of the extension. Each project lists the project version. Projects that have unsaved changes are indicated with "(*)". Hover your mouse over a project to see what repository it's stored in.
Link a file to the current project (files only)	Right-click a file, and then select **Link Item**. This option isn't available if the file is locked by another user.
Embed a file in the current project (files only)	Right-click a file, and then select **Embed Item**. This copies the file to the current project.

Task	Description
Lock or unlock a file (files only)	You can lock a file so that no other user can edit the file or add new versions. Right-click the file, and then select **Lock Item**, or, if you have previously locked the file, select **Unlock File**.
Rename a file or folder	Right-click a file or folder, and then select **Rename Item**.
Add a file or folder to your favorites	Right-click a file or folder, and then select **Add to Favorites**, or, if you have previously added the item to your favorites, select **Remove from Favorites**.
Save a project as a new version	Right-click the project, and then select **Save as New Version**, or click at the bottom of the extension.
Reset changes made to a project	Right-click the project, and then select **Download Latest Version**, or click at the bottom of the extension. Downloading the latest version of the project overwrites any changes you've made.
Upload a new version of a file (files only)	Right-click a file, and then select **Upload Version from Selected Layer** or **Upload Version from Selected Image**. This option isn't available if the file is locked by another user.
Add a file to an asset repository (files only)	You can save a Documents file to an asset repository. 1. Right-click a file, and select **Add Item to Assets**. 2. Select a destination repository. 3. Edit the name or description as necessary. 4. Select an asset type to apply to the file. 5. By default, the repository's default language is selected and the asset is set as translatable. If this asset is in another language, select it. The available languages are set in the repository. You can also elect to make the item non-translatable. 6. Click **Save**. A copy of the item will be made and added to the repository as a new asset and so is listed as version one in the repository, regardless of the version number in Documents. For example, if you select v3 of a document and add it as an asset, it will be listed as v0.1 when viewing the asset in the repository. The asset will include on the asset tile, signifying that the asset is linking to a Documents file. If you change the Documents file, it won't automatically affect the asset. However, you can check the asset for updates and update the asset to the newest version of the Documents file at any time. If you permanently delete the Documents file, the asset remains in place, no longer linked to the Documents file.
Delete a project, file, or folder	Right-click a project, file, or folder, and then select **Delete Item**.
View a file or folder in the web	Right-click a file or folder, and then select **Open in the Web**, which opens the file or folder in a browser.
View properties	To view item properties, such as file size and owner, right-click the item, and then select **Properties**.
View tags	To assign tags to the item, right-click the item, select **Properties**, click , and then select **Tags**.

Links View

Note:

Links view isn't available in Audition.

Here are some points to know about Links view:

- Displays those assets already linked to the project.
- If an asset has a local change, an asterisk is appended to the end of the version number.
- If a new version is available in the repository, a notation is made after the version number.

You can perform additional tasks in Links view:

Task	Description
Download the asset	Right-click the asset, and then select **Download Latest Version** to download the asset to your computer.
Upload a new version of the asset	Right-click the asset, and then select **Upload New Version**. This option isn't available if the asset is locked by another user.
View properties	To view asset properties, such as file size and whether the asset has been published, right-click the asset, or open the item and click , and then select **Properties**.
View renditions	To view all the system and custom **renditions** associated with an asset, right-click the asset, or open the asset and click , and then select **Renditions**.
View collections	To view the collections an asset is a part of, open the asset and click , and then select **Collections**.
View channels	To target the asset to publishing channels, open the asset and click , and then select **Channels**.
View categories	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by opening the asset and clicking , and then selecting **Categories**. Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
View tags	To assign tags to the asset, open the asset and click , and then select **Tags**.
View workflows	If workflows have been assigned to the repository you're viewing, you can view the workflows in the extension. To view workflows, open the asset and click , and then select **Workflows**.
View video	If you're viewing a video asset, open the asset and click , and then select **Player**.

Attributes

To view the attributes associated with a custom digital asset, right-click the asset or click , and then select **Attributes**.

To edit attribute values:

1. Click .
2. If the asset was created from an out-of-the-box digital asset type (Image, Video, Video Plus, or File), you can convert it to a custom digital asset type by selecting a new asset type.
3. If the asset is translatable, you can choose the language for the asset. The languages shown are those that are allowed in the repository and haven't yet been used for the item.
4. Edit the attribute values as necessary, and then click **Save**.

Languages

To view and manage all the translations for an asset, right-click the asset, and choose **Manage Languages**; or click , and then select **Languages**.

Each language is represented by a tile that includes the name, version, type, status, and language.

You can perform the following actions:

Task	Description
Add a translation	To add a translation: 1. Click +. 2. Edit the name and description as necessary. 3. Choose a language for the asset. The languages shown are those that are allowed in the repository and haven't yet been used for the item. 4. If the associated asset type allows a separate native media file for each language, click **Add**, then select whether to copy the file from an existing language or add a new media file from the selected layer or the selected image. 5. If the asset includes attributes, enter attribute values as necessary. 6. Click **Save**.
Upload a new version for a translation	Right-click the translation, and then select **Upload Version from Selected Layer** or **Upload Version from Selected Image**. This option isn't available if the asset is locked by another user.
Set a language as the master	Right-click the translation, and then select **Set as Master**.
Set a language as translated	Right-click the translation, and then select **Set as Translated**.
Delete a translation	Right-click the translation, and then select **Delete Translation**.

Renditions

To view all the system and custom renditions associated with an asset, right-click the asset or click , and then select **Renditions**.

If an asset has several versions, you can switch between the latest version and previous versions using the drop-down menu next to the version number. Select a previous version from the drop-down to see renditions of that version. Author and modification date information about selected versions is displayed under the asset title. Previous versions cannot be edited unless first made current by clicking **Make this version current**. Published assets cannot be edited unless you select **Save as new version**.

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

- Copy the rendition to create a customized version of the rendition.
- Link the rendition to the current project.

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

- Link or embed the rendition to the current project.
- Replace the rendition with the selected layer.
- Replace the rendition with the selected image.
- Delete the rendition.

> **Note:**
>
> Some options won't be available if the asset has been locked by another user.

Use Workflows in the Extension

If workflows have been assigned to the repository you're viewing, you can view the workflows in the extension. To open the workflows panel, right-click the asset or click , and select **Workflows**. The workflow panel has tabs representing possible workflow states:

- **Submit** (displayed if an asset has no workflows in progress)—Select a workflow from the list of available ones in the selection box and click **Submit for Review** to initiate a workflow. If the asset has dependencies, you can choose whether to also submit the dependencies for review.
- **In Progress** (replaces the Submit tab once a workflow is initiated for an asset)—A list of steps is displayed showing the progress of the asset through the workflow. Completed steps identify the person and date when an action was taken. If you have a responsibility for a step, the actions you can take are available in a selection box. You must confirm the action when selected and can add an optional comment. When the action is finished the next step, if there is one, is added to the list.
  If the workflow has several completed actions, they may be grouped under an expandable heading labeled **Audit Trail**.

  If you want to remove the asset from workflow without completing the workflow, click **Cancel Workflow**.

- **Completed** (always displayed)—Displays a list of completed workflows for the asset if there are any, and the date each workflow was completed. Completed workflows can include both approved and rejected workflows. Each completed workflow can be expanded to see a detailed list of the actions in the workflow.

Update the Extension

When a new version of the extension is available, you'll see a notification at the top of the extension, prompting you to download it.

You can also check for updates by clicking , and then selecting **Check for Updates**. You'll see either a message stating that the extension is up to date or a notification that an update is available, prompting you to download it.

> **Note:**
>
> In Audition, the extension options are available via the command bar.

Troubleshoot the Extension

If you need to report an issue with the plug-in, you can zip up your log files and send them to support. Click , and then select **Troubleshooting**. You'll be prompted to save the .zip file of your logs.

Uninstall the Extension

To uninstall the extension on Microsoft Windows:

1. Open Microsoft Windows **Settings**, open **Apps**, and then open **Apps & features**.
2. Next to **Oracle Content Extension for Adobe**, select the app or open the More menu, and click **Uninstall**.

To uninstall the extension on Apple Mac:

1. Open a Terminal window at the following location: `~/Library/Application Support/Oracle/Adobe`
2. Enter the following command: `sudo bash ./uninstall.sh`

Create and Edit Desygner Assets

To work with Desygner assets and templates, you need the Enterprise User role (to access the Assets page) and access to an asset repository that has been integrated with Desygner. You can perform the following tasks with Desygner assets and templates:

- Import a Desygner template.
- Edit the template.
- Create Desygner assets (PDF assets based on Desygner templates).
- Edit the assets.

- Publish the assets.

Import a Desygner Template

To import Desygner template:

1. Click **Assets** in the navigation panel in your browser, and make sure you're viewing an asset repository that has been integrated with Desygner.
2. Click **Add** and then select **Import Template from Desygner**.
3. If this is your first time importing a Desygner template, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
4. Open the appropriate campaign folder, select the Desygner template you want to use to import, and then click **OK**.
5. In the Add to Repository dialog, click **Done** to import the template.

You can now edit the template.

Edit a Desygner Template

To edit a Desygner template:

1. On the Assets page, select the template and choose **Edit in Desygner** from the right-click menu or the menu.
2. If this is your first time editing a template in Desygner, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
3. Edit the template in Desygner.
4. When you're done with your changes, click **Save**.
5. To close the Desygner editor and return to the Oracle Content Management Assets page, click **Done**.

Create Desygner Assets

To create Desygner assets:

1. Click **Assets** in the navigation panel in your browser, and make sure you're viewing an asset repository that has been integrated with Desygner.
2. Click **Create** and then select **Create Desygner Asset**.
3. If this is your first time creating a Desygner asset, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
4. Open the appropriate campaign folder, and select the Desygner template you want to use to create an asset.
5. In the Add to Repository dialog, click **Done** to create an asset from the selected template.

You can now edit the asset.

Edit a Desygner Asset

To edit a Desygner asset:

1. On the Assets page, select the asset and choose **Edit in Desygner** from the right-click menu or the menu.
2. If this is your first time editing an asset in Desygner, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
3. Edit the asset in Desygner.
4. When you're done with your changes, click **Save**.
5. To close the Desygner editor and return to the Oracle Content Management Assets page, click **Done**.

When you're ready, you can publish the asset.

7

Create and Edit Structured Content

As an asset user, you can perform the following tasks:

- Understand Structured Content
- Create Content Items
- Work with Content Items on the Assets Page
- Perform Actions While Viewing a Content Item
- Edit Content Items
- Compare Content Item Versions

Understand Structured Content

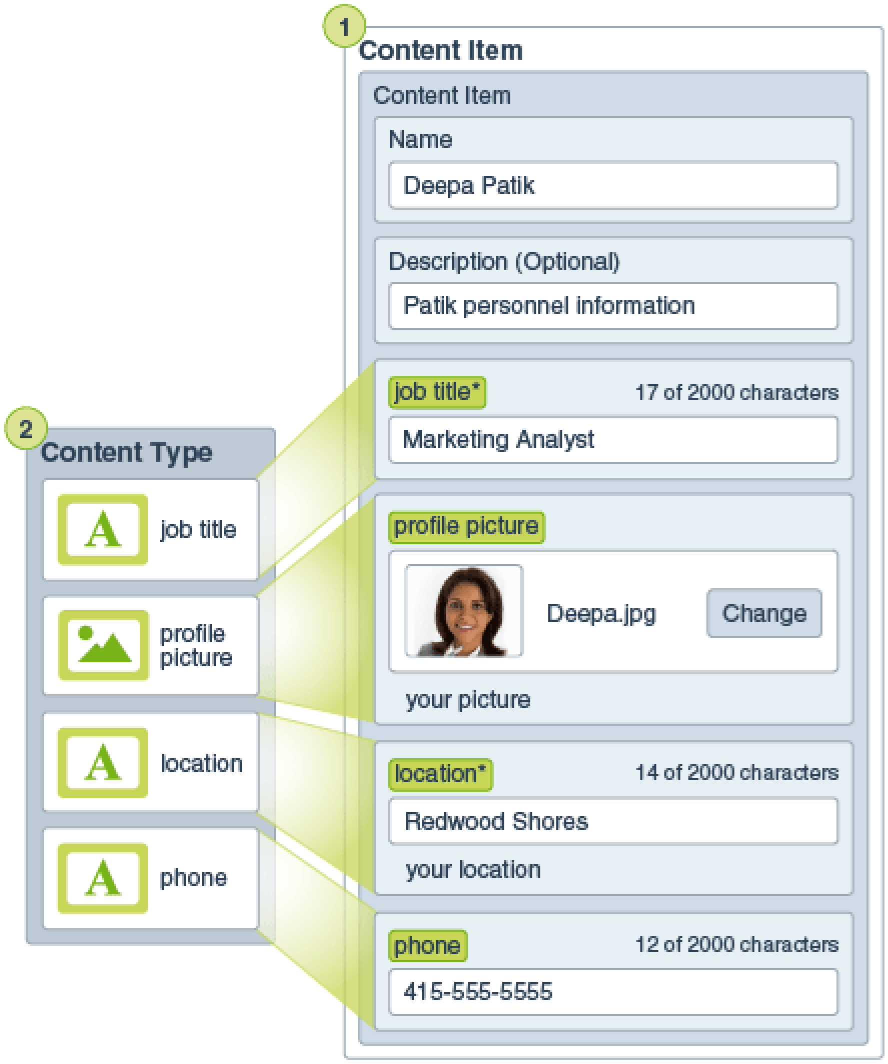
“Structured content” is a term used to describe content that exists separately from any file or layout.

Overview of Structured Content

A *content type* is a framework for information that can be used in a website or for other projects. You can think of a content type like a form, where information is entered and saved. The content type is used to create a *content item*. Content items are essentially individual instances of the completed content type "form".

A content type might require text, a date, an image, or a variety of numerical fields. It all depends on what’s needed. Because each piece of information is in a separate field, possibly even a separate referenced asset, you can reuse pieces of the content by referencing them in other assets. And, the content type may have several different associated layouts, so depending on where your content is used, it might appear with a large picture and small typeface, or a small picture with wraparound text.

For example, perhaps there’s a content type called Employee Information. It might have fields for a job title, geographical location, a brief biography, and a picture. When you use that content type to create a content item, you enter specific information: job title, location, contact information, and upload a photo as a separate digital asset that's referenced in the content item. The location and contact information may be omitted in one place or included in another, and the employee photo may be just a small avatar or a larger image next to the employee's bio. The content itself won’t change, but the layout and which pieces are displayed can change without affecting the actual content that you entered.



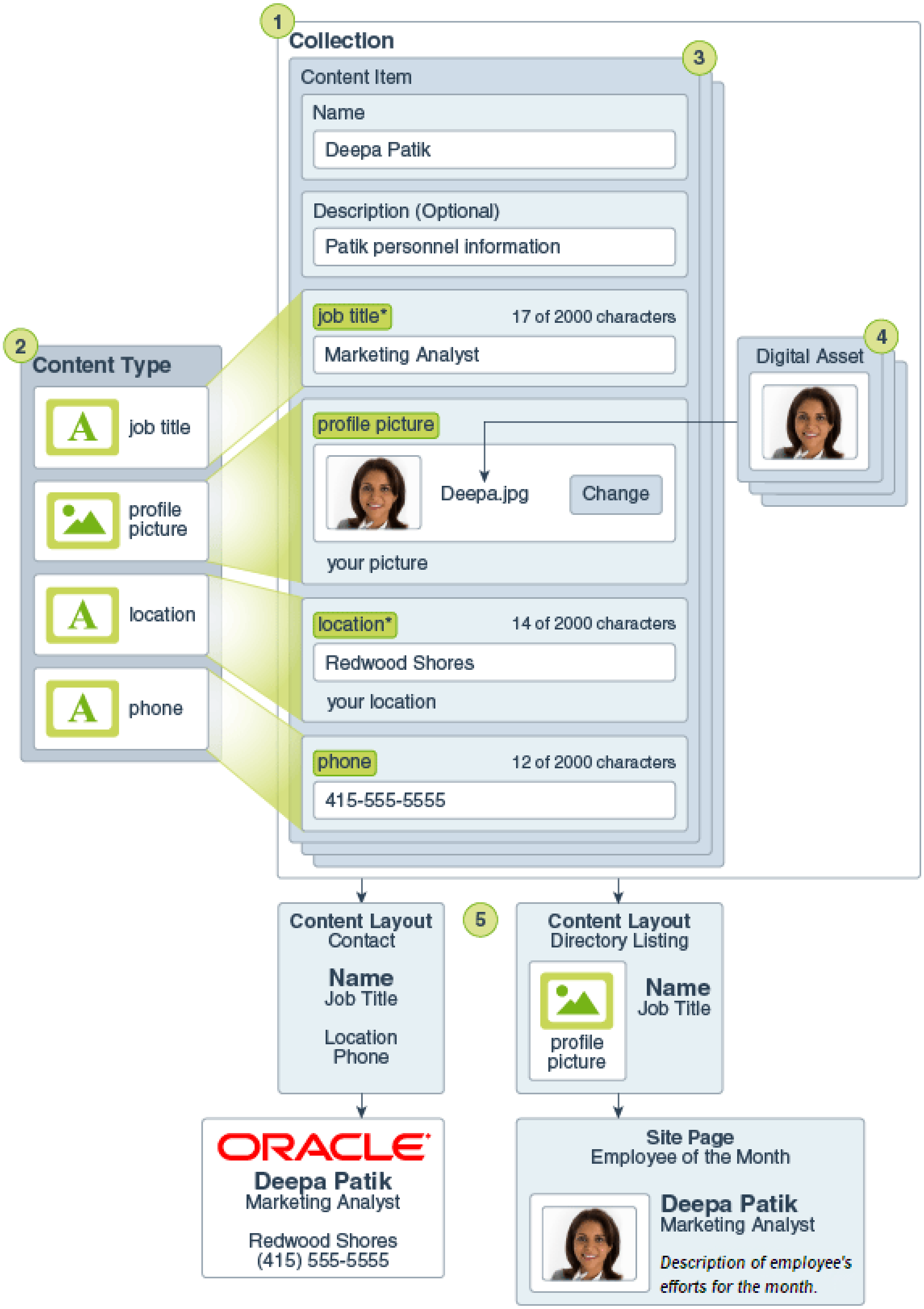
A content type is created by a user with the content administrator role, and then has to be associated with a repository. Enterprise users with at least the contributor role to the repository can then use the content type to create a new content item. Depending on your role in the organization, you may not actually put structured content to use. You may just create content items or add business documents that are needed. See Learn About User Roles for details about roles and responsibilities.

Use Structured Content

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

- Templates and layouts for a website and content types are designed and deployed. This is usually handled by an IT designer with content administrator or site administrator privileges. Often those roles are given to one person, but some organizations may have different people in those roles.
- **Collections (1)** are created to manage the website elements. When a site is created a collection is automatically created, making it easy to manage all the content for the site. Or users can create independent collections to manage their digital assets.

- A person with a content administrator role designs the **content types (2)**.
- The content administrator must share the collection and associate the content types with a repository, then users with at least the contributor role on the repository can upload assets and create **content items (3)**.
- Contributors add the content items and upload the **digital assets (4)** for the website or project. When a content item is created, it’s assigned to a collection so it can be managed with the collection’s policies.
- A content type can have different **content layouts (5)** associated with it, letting you display the content in different ways.
- The IT designer or site administrator adds the digital assets and content items to the website or the project. On a website, the items appear as part of the content available to use on the site.


1
Collection
3
Content Item
Name
Deepa Patik
Description (Optional)
Patik personnel information
job title*
17 of 2000 characters
Marketing Analyst
profile picture
Deepa.jpg
Change
your picture
location*
14 of 2000 characters
Redwood Shores
your location
phone
12 of 2000 characters
415-555-5555
2
Content Type
job title
profile picture
location
phone
4
Digital Asset
5
Content Layout
Contact
Name
Job Title
Location
Phone
Content Layout
Directory Listing
Name
Job Title
profile picture
ORACLE
Deepa Patik
Marketing Analyst
Redwood Shores
(415) 555-5555
Site Page
Employee of the Month
Deepa Patik
Marketing Analyst
Description of employee's efforts for the month.

Example

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

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

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

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

Create Content Items

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

To create a content item:

1. Click **Assets** in the navigation panel in your browser.
2. Click **Create** and then select **Create new content item**. If you've created content items before, the last five types you used are shown. Otherwise, select the content type you want to use from those shown.

   > **Note:**
   >
   > If you don't see a content type you expect to see, contact your content administrator.

3. Enter a name and an optional description for the content item. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review or publish the asset.
4. If the asset type allows friendly URLs (asset repositories only), enter a friendly item name for the URL.
5. By default, the repository's default language is selected. If this asset is in another language, select it. The available languages are set in the repository.
   If the asset is stored in an asset repository, the asset is set as translatable by default, but you can make it non-translatable if you want. This option isn't available in business repositories; all assets in business repositories are non-translatable.
6. Enter information into the necessary content item data fields. The fields might be grouped together and certain groups might be collapsed by default. Expand the collapsed groups to view the additional fields.

Note:

Content types may designate that some data fields be set to inherit content from the master item. If you are creating the master item, you will need to populate those fields with the appropriate content. Once the master item is populated, fields designated to inherit from the master item will we prepopulated when a language is added.

7. If the content item includes a media reference, you can perform the following actions:

   - To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.

   - To select an existing media item from an asset repository, click . All digital assets are shown.
     If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

     Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.

   - To clear the media item, click .

8. If the content item includes a referenced content item, you can perform the following actions:

   - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.

   - To select an existing content item, click and navigate to the desired content item.

   - To clear the content item, click .

9. If a taxonomy is associated with the repository, you see the **Categories** in the right panel. To assign categories to this content item, click **Add Category**.

10. Optionally, assign tags—keywords that let users find the item quickly. Select **Tags and Collections** in the right panel. Add the tags for the asset. Press **Enter** after each tag. You can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.

11. Optionally, choose the collections associated with the item by selecting **Tags and Collections** in the right panel and locating the collection you want.

12. Select **Channels** in the right panel (asset repositories only) to view or choose the channels where this item may be used. The available channels are those that were defined with the repository where the content item is managed. Click **Add**, select the channels, then click **Add**.

When you're satisfied with the content you created, you can perform one of the following tasks. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review or publish the asset.

- To save and publish the item, click **Publish**, and then choose **Publish Now** or **Publish Later**.

  > **Note:**
  >
  > You can also publish an asset from the Assets page.

  Oracle Content Management validates the assets by comparing the assets to the approval and localization policies of the channel. If all assets are ready, Oracle Content Management publishes them. The status is shown in the banner.

  If any errors occur during publishing, the status shown in the banner includes a link to **View Validation**.

  The validation results list the status of the selected assets, any associated translations, and any dependent assets, showing whether the assets adhere to the approval and localization policies that were set for the channel. You must correct any issues before attempting to publish again. For example, if another version of the asset is already scheduled for publishing, you must schedule publishing for a date later than the previously scheduled publishing.

  You can perform the following actions:

  – You can filter the results by channel or by status.

  – To view an asset in a slide-out panel without leaving the Validation Results page, click next to the asset.

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

- To save and preview the item in a slide-out panel without leaving the content item editor, click .
- To save the item and remain in the editor, click **Save**.
- To save the item and close the editor, click **Done**.

After creating your content item, you might want to perform other actions on it or translate it. See Work with Content Items on the Assets Page or Localize Assets.

Once you have created and saved the content item, you can see how the content will look with the different layouts associated with the content type by clicking to view in a new page or **Preview** to view in a slide-out panel. By default, the content is set to fit the browser window. You can select other layout options from the drop-down menu to see how the item will look on different devices, in different sizes, or, if configured, on specific site pages. You can also create your own device size. Alternatively, you can view the ruler by clicking . Click one of the intervals under the ruler to see how the item appears at different sizes. When you select a mobile device size you can also select to see how the item appears on a mobile device depending on orientation.

Work with Content Items on the Assets Page

You can view, edit, and manage your content items in many ways on the Assets page.

When you select or right-click a content item you can perform the following actions:

Task	Description
View the asset	To view the content item in a slide-out panel without leaving the Assets page, click the asset name, choose **View** in the right-click menu, or click in the actions bar. To view the content item in a new tab, press Ctrl and click the asset name. When the asset is open you can also see how the content will look with the different layouts associated with the asset type, and access the editor.
Edit the content item	To edit the content item, choose **Edit** in the right-click menu or click in the actions bar or on the asset tile. While editing the content item, you can add or edit values, media, or content item references. You can also change the language assigned to the content item.
Duplicate the content item	To duplicate the content item, choose **Duplicate** in the right-click menu or click in the actions bar. A new version of the content item is created with “Copy” appended to the name. You can edit the item as needed without affecting the original version.
Copy the asset	To copy the asset to another repository, choose **Copy To** in the right-click menu or click in the actions bar, select the repository you want to copy the asset to, then click **Copy**. You must have the Manager role on the target repository. You can select more than one asset to copy at the same time. Only the current version of each asset will be copied. If the content types used for the copied content items aren't already associated with the target repository, the association will be done automatically. If you're copying a content item that references another asset, the referenced asset will also be copied to the target repository. Repository managers can also copy assets from one repository collection to another.
View translated versions of the asset	To see all the translated versions of the content item, choose **Manage Languages** in the right-click menu or the **Languages** menu in the actions bar. In the Languages panel, if permitted, you can translate the content item by clicking **Add Language**. To restrict the content item from being translated, click **Non-translatable**. This action can't be undone, and it removes any existing translations, so be sure you want to make the item non-translatable before you confirm the action.

Task	Description
Translate the content item	To add a translation for the content item, choose **Translate** in the right-click menu or the **Languages** menu in the actions bar, and create the translation job. After creating the job, it will need to be sent to translation by someone with rights to do so.
Lock or unlock the asset	To lock the asset so other users can't edit it, choose **Lock Assets** from the right-click menu or the **Lock** menu. If you also want to lock all the asset's dependencies, choose **Lock Assets and Dependencies** from the right-click menu or the **Lock** menu. For example, you may want to do this if you're waiting for approval. If the asset has already been locked by you, you can instead choose **Unlock Assets** or **Unlock Assets and Dependencies**.
Publish or unpublish the asset	To publish the asset and make it available for use in a site, choose **Publish Now** or **Publish Later** from the right-click menu or the **Publish** menu. You can select more than one asset to publish at the same time. If the asset has already been published, you instead see an option to **Unpublish** it.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Choose **Submit for Review** from the right-click menu or the **Workflow** menu. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. You can select more than one asset to submit for review at the same time. • Workflow: Choose **Workflows** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click) to move the asset through workflow. The submission status is shown below the asset preview: • Draft • In Review • Approved • Rejected
Find similarly categorized assets	If the asset has been categorized, find assets that are assigned to similar categories as the selected asset, by choosing **Find Categorized Similarly** in the right-click menu or the **Find** menu.
Assign categories to the asset	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by choosing **Categories** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
Target the asset to publishing channels	To target the asset to publishing channels, choose **Channels** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). You can select more than one asset to assign channels to at the same time.
Assign tags and collections	To assign tags and collections to the asset, choose **Tags and Collections** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click).

Task	Description
View the asset's properties	To view the asset's properties, choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile; or choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click); and then click the **Activity** tab.
Archive the asset	If the asset isn't used anymore, but you're not ready to permanently delete the asset, you can archive it. To archive the asset from the repository, choose **Archive** in the right-click menu or click in the actions bar. To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.
Remove the asset	To remove the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar. You can select more than one asset to delete at the same time. If the asset has been published, it will be unpublished before it's deleted, so you must have permission to unpublish the asset.
View analytics	To view the asset's analytics, click , then, in the drop-down menu, select **Analytics**.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset or sites that use this asset, click , then, in the drop-down menu, select **Inventory**.

Perform Actions While Viewing a Content Item

While viewing an asset, you can perform the following actions.

Task	Description
View the published version	If the asset has been published, but has a newer draft version, you see the draft version by default. You can switch to the published version using the status icon drop-down list just above the asset preview.

Task	Description
Preview the asset in layouts	By default you see content items in the content form view—the field names and values from the asset type. • If there are other layouts or site pages configured for the associated asset type, you can preview them by selecting a layout or site page from the drop-down list. • By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking . • To show the ruler and manually change the device size, click , then move the handles to change the height and width.
Compare content item versions	If a content item has been edited and has more than one version in a repository, you can open the content item and easily compare differences between versions by clicking **Compare Versions**.
Publish the asset	To publish the asset and make it available for use in a site, choose **Publish Now** or **Publish Later** from the **Publish** menu.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Click **Submit for Review**. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. • Workflow: Choose **Workflows** from the drop-down menu in the sidebar (click) to move the asset through workflow.
Edit the asset	To edit an asset, click **Edit**. While editing a content item, you can add or edit values, media, or content item references. You can also change the language assigned to the content item, as long as content item's translation set doesn't already include a version in the newly selected language. After editing the content item you can save your changes or publish the content item.
View the asset full-screen	To view the asset full-screen, click **Full Screen**. Click **Exit Full Screen** or press Esc to exit full-screen.
Close the asset	To close the asset, click **Close**.
View items referenced in a content item	If the content item references other digital assets or content items, in the Content Form View, next to the referenced item you want to view, click . A slide-out panel opens, showing the referenced item.
View the asset's properties	To view the asset's properties, click , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile or click **Properties**, and then click the **Activity** tab.
View analytics	To view the asset's analytics, click , then, in the drop-down menu, select **Analytics**.

Task	Description
View the asset's categories	If a taxonomy is associated with the repository the asset is stored in, you can view and manage the categories assigned to the asset by clicking , then, in the drop-down menu, selecting **Categories**. **Note:** Categories are available only in Oracle Cloud Infrastructure, not Oracle Cloud Infrastructure Classic.
View the channels the asset is targeted to	To view and manage channels the asset is targeted to, click , then, in the drop-down menu, select **Channels**. Add or remove channels as necessary.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset or sites that use this asset, click , then, in the drop-down menu, select **Inventory**.
View the tags and collections assigned to the asset	To view and manage the tags and collections associated with the asset, click , then, in the drop-down menu, select **Tags and Collections**. Add or remove tags and collections as necessary.

Edit Content Items

You can edit your digital assets in several ways:

- Edit a Content Item
- Assign Asset Categories
- Tag Assets
- Assign Publishing Channels
- Revert to a Previous Version

Edit a Content Item

To edit a content item, including the name or description, select the item and click in the actions bar or on the asset tile; right-click the item and choose **Edit**; or, while viewing the item, click **Edit**.

You can perform the following actions in the content item editor:

- **Edit the name.**
- **Edit the description.**

- **Configure a friendly URL**—If the asset type allows friendly URLs (asset repositories only), enter a friendly item name for the URL.
- **Configure language**—If the asset is translatable, you can set the language. By default, the repository's default language is selected. If this asset is in another language, select it. You see only those languages that are set in the repository and don't already include a translated version.
- **Add or edit media**—If the content item includes a media reference, you can perform the following actions:
  - To edit the media or media attributes, click , and choose an option.
  - To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  - To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
  - To clear the media item, click .
- **Add or edit a referenced content item**—If the content item includes a content item reference, you can perform the following actions:
  - To edit the content item, click .
  - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  - To select an existing content item, click and navigate to the desired content item.
  - To clear the content item, click .
- To save and publish the item, click **Publish**, and then choose **Publish Now** or **Publish Later**.

> **Note:**
>
> You can also publish an asset from the Assets page.

Oracle Content Management validates the assets by comparing the assets to the approval and localization policies of the channel. If all assets are ready, Oracle Content Management publishes them. The status is shown in the banner.

If any errors occur during publishing, the status shown in the banner includes a link to **View Validation**.

The validation results list the status of the selected assets, any associated translations, and any dependent assets, showing whether the assets adhere to the approval and localization policies that were set for the channel. You must correct any issues before attempting to publish again. For example, if another version of the asset is already scheduled for publishing, you must schedule publishing for a date later than the previously scheduled publishing.

You can perform the following actions:

  - You can filter the results by channel or by status.
  - To view an asset in a slide-out panel without leaving the Validation Results page, click next to the asset.
  - To remove an asset from publishing, click the X next to the asset.

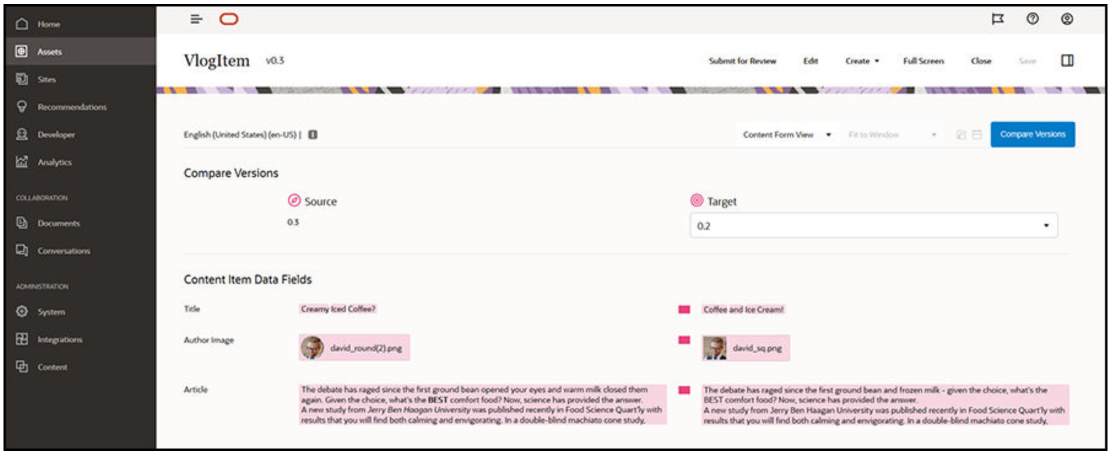
- To add an annotation to the item, click , select an area or click where you want to add the annotation, then enter your comment in the text box, and click **Post**.
- To view annotations on the item, click . When you click an annotation, the annotation note will get focus in the conversation.
- To save and preview the item in a slide-out panel without leaving the content item editor, click .
- To save the item and remain in the editor, click **Save**.
- To save the item and close the editor, click **Done**.
- When you're done, click **Save**.

Compare Content Item Versions

If a content item has been edited and has more than one version in an asset repository, you can open the content item and easily compare differences between versions.

1. On the **Assets** page, right-click or select an asset with more than one version and choose **Open** in the right-click menu or click in the actions bar.
2. Click **Compare Versions**. This option is available only if the content item has more than one version.
3. Select the target version from the menu to compare to the source version. The source version is the opened version, typically the most recent version.
4. Click **Compare Versions**.

The two versions of the content item are displayed next to each other with change indicators between them and the changed areas highlighted.



If your browser is not wide enough to display the comparisons next to each other, the versions will stack, with changed areas one above the other and change indicators on the right.

Click **Compare Versions** to close the comparison and display the opened source version.

If you want to revert to a previous version, you can open it from the Activities tab of the Properties panel.

1. Click select the **Properties** pane and then click the **Activities** tab.
2. Click the version number you want to revert to, and then click **Make Current**.

8
View Assets and Their Data

After finding the assets you want you can view the assets and their associated information and properties in various ways.

- View an individual asset to view its data and perform actions on the asset.
- View the transcript for a video.
- Change the Assets page view to show performance data.
- View all the translated versions of an asset by choosing **Manage Languages** in the right-click menu or the **Languages** menu in the actions bar.
- View asset data in the sidebar panel by clicking and then selecting an option from the drop-down menu:
  - Analytics
  - Attributes (available when viewing a digital asset)
  - Categories
  - Channels
  - Conversation
  - Inventory
  - Properties (which includes asset activity and history)
  - Renditions (available when viewing an image asset)
  - Tags and Collections
  - Workflows
- View archived assets.
- Access published digital assets through a URL.
- To view assets in sites, they must be added to a site, see Work with Assets and Content Items.

Search, Filter, and Sort Assets

You can search for assets the same way you search for other files or folders. The Assets page and media picker enable you to perform more complex asset searches, filter assets to further focus your search, and sort them to help you find what you need.

Use the search box in the banner, on the Assets page, or in the media picker (when selecting a referenced asset). Search for any term, keyword, or tag. Oracle Content Management searches asset titles, asset content (including the full text of digital assets such as PDFs, Microsoft Word documents, and other text documents), and tags.

Note:

Tags and Localization—Manually added tags are searchable in the language used to add them. Smart tags are searchable in English, French, Italian, German, Spanish and Japanese.

The Assets page and the media picker include additional search, filter, and sort features:

- Find Visually Similar Assets—If smart content is enabled on the repository, you can find digital assets that are visually similar to selected images.
- Find Assets of Similar Categories—When categories are enabled and assigned to assets, you can find assets that are assigned to similar categories.
- Smart Content—If smart content is enabled on the repository, images will automatically be assigned machine tags based on their content, improving your search. And after you search, you'll see recommended keywords to further target your search. Smart content also enables you to filter assets by color.
- Filter Assets—You can filter by collection, channel, language, media group, asset type, color, status, or category. You can also perform a more complex field search, which enables you to use wildcards.
- Bookmark Asset Searches—If you frequently perform the same asset search, you can bookmark it.
- Sort Assets—You can sort assets by relevance, name, or the last date they were updated.
- Understand How Translations Affect Searching and Filtering—When you search of filter for assets in *all* languages, you may see results you don't expect.

Find Visually Similar Assets

To find visually similar assets:

1. Click **Assets** in the left navigation menu, or click **Select** when creating a content item to select media.
2. Select or right-click the image, then choose **Find Visually Similar** from the right-click menu or the **Find** menu

Assets are filtered to exclude content items and limit the results to only images that are similar to the image originally selected. A capsule is displayed in the filter area representing the visually similar search. Reset the search by clearing the capsule.

Find Assets of Similar Categories

To find similarly categorized assets:

1. Click **Assets** in the left navigation menu, or click **Select** when creating a content item to select media.
2. Select an asset or right-click the asset to open a contextual menu. You can select multiple assets to see results in categories similar to all those selected.

Assets are filtered to exclude content items and limit the results to only assets that are assigned to similar categories as the asset or assets originally selected. A capsule is displayed in the filter area representing the categorized similarly search. Reset the search by clearing the capsules.

Smart Content

If smart content is enabled on the repository, Oracle Content Management analyzes images and automatically applies machine tags describing the image content and determines the colors in the image. This allows you to filter assets by color and search for image content based on the automatically applied machine tags. After you add a search term, you'll also see recommended keywords under the search box. Click a keyword to add it to your search. This brings images tagged with both words closer to the top of the result list and displays additional images tagged with the added keyword.

> **Note:**
>
> Color tags are applied to images created in Oracle Content Management version 21.9.1 or later (September 2021).

If you don't see the assets you were expecting, make sure you're looking in the correct repository, and that your selected filters aren't hiding the content.

Tags and Localization

Smart tags are available in English, French, Italian, German, Spanish and Japanese. If a person has set their language preferences to one of those languages, smart content tags will be shown in the preferred language. If no language is specified in the user's preferences, or if the preferred language is not one of the languages listed, then smart tags will default to English.

Manually added tags are available in the language used to add them. If an asset includes both manually added tags and smart tags, this could result in a mix of languages in the tags. For example, if smart content has assigned tags in English and a user manually adds additional tags in English, when a user with Spanish set as their language preference views the asset and tags, they will see the smart content tags in Spanish and the manually added tags in English.

Filter Assets

On the Assets page, you can filter what you see. If the filter features are hidden, click . You can apply the following filters:

- **Collection**—Select a collection in the drop-down list. You see only the collections you have access to that are in the selected repository. Select **Not In Collection** to see assets not associated with any collection. Website and standard collections are signified by before their names, and dynamic collections are signified by .
- **Channel**—Select a channel in the drop-down list. You see only the channels that are associated with the selected repository. Select **Not Targeted** to see assets that aren't targeting to any publishing channel.
- **Language**—Select a language in the drop-down list. You see only the languages that are available in the selected repository. Select **Non-translatable** to see assets that can't be translated.

- **Media group**—Filter by images, videos, documents, content items, or other.
- **Asset type**—Filter by any asset type available in the selected repository.
- **Color**—If smart content is enabled on the repository, you can filter images by color, selecting up to five colors.

> **Note:**
>
> Color tags are applied to images created in Oracle Content Management version 21.9.1 or later (September 2021).

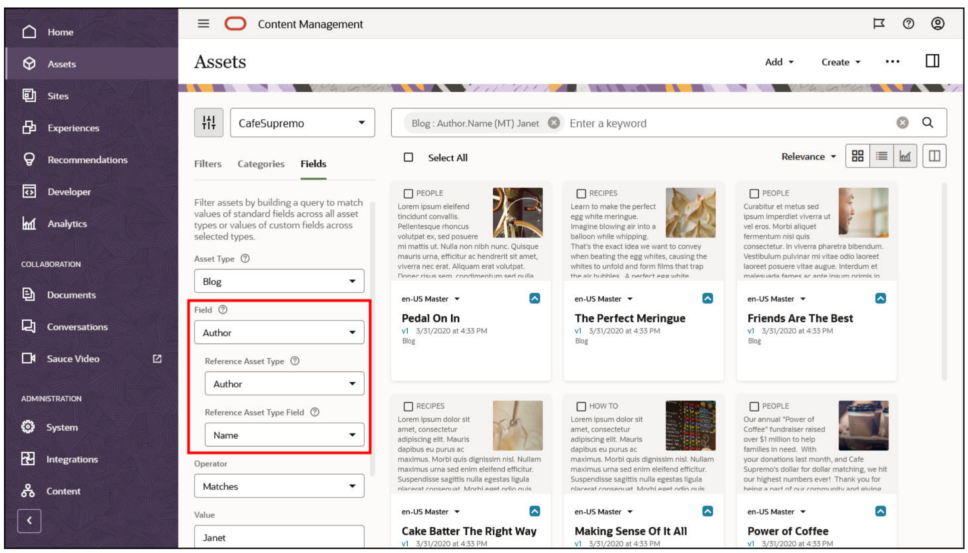
- **Status**—You can limit your view to items that have properties determined by the repository where they're managed. For example, a publishing policy may state that the assets can only be published if they've been approved. After those policies have been applied to the assets in the collection, you can then filter to see the following types of status:
  - **Not ready**—Show assets that include required fields that are missing data and are therefore not ready for publishing.
  - **Approval**—Filter by approval status, such as draft, translated, in review, approved, or rejected.
  - **Publishing**—Show assets that are published, not published, scheduled for publishing, or not scheduled for publishing.
  - **Categorization**—Show assets that have been recategorized since last published. Show assets that are not categorized.
  - **Workflow**—Show assets that are in workflow.
  - **Lock**—Filter by whether the asset is locked by you, locked by others, or not locked.
  - **Linked**—Show digital assets that have been added from Documents.
- **Category**—If a taxonomy is associated with the selected repository, you can filter by categories on the **Categories** tab. Taxonomies provide a hierarchical, folder-like structure within a category, and by default will search through all children of the selected node.
  Next to each category, you'll see the number of assets assigned to that category and any children of the category.

  By default, when you select a category, you'll see all assets assigned to that category or any children of the selected category. If you prefer to limit your search to a specific parent category, select the category and deselect **Include All Children**.

  If there is a large number of categories in a taxonomy, you can search for specific categories using the search field on the Categories tab.

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

- **Fields**—You can search for standard property values (for example, created by or description), attribute values from custom asset types, or EXIF metadata (such as aperture or orientation) from camera images on the **Fields** tab. You can also use wildcards in your search value.
  To search for values:
  1. Select an **Asset Type**.
     – To search standard property values, select **All**.
     – To search attribute values from custom asset types, select a custom asset type.
     – To search for EXIF metadata, select **All** or select a digital asset type that supports JPG, PNG, or TIFF files (this includes the Image asset type).
  2. Select a **Field**.
     If you select a reference field, you see additional options:
     – Select a **Reference Asset Type**. This limits the search to referenced assets of the selected asset type.
     – Select a **Reference Asset Type Field**. This limits the search to the selected field in the referenced asset type.



  3. Select an **Operator**.
  4. Enter a value to search for. You can use ? as a wildcard to match any single character and * as a wildcard to match zero or more characters.
  5. Press Enter.

  To add more filters, click **Add**. Additional filters are treated differently depending on what they are:

  – Unique fields from the same asset type are grouped together and searched with "and" between the filters. For example, if you filter on the *Blog* asset type for the *Author* field matching "Susan Brown", then add another filter on the *Blog* asset type for the *Title* field containing "coffee", only blogs authored by Susan Brown and with "coffee" in the title will be returned in the search.

  – Repeated fields from the same asset type (with different operators or values) are searched with an "or" between the filters. For example, if you filter on the *Blog* asset type for the *Title* field containing "coffee", then add another filter of the *Blog* asset type for the *Title* field containing "latte", blogs with "coffee" or "latte" in the title will be returned in the search.

– Unique asset types are searched with an "or" between the filters. For example, if you filter on the *Blog* asset type for the *Author* field matching "Susan Brown", then add a filter on the *Article* asset type for the *Author* field matching "Susan Brown", blogs or articles authored by Susan Brown will be returned in the search.

To remove a filter, in the search bar, click next to the filter.

Bookmark Asset Searches

Any search and filter conditions you apply to the assets view are added to the URL, so you can bookmark an asset search using your browser's bookmarking feature.

Sort Assets

Use the drop-down menu on the right, under the asset search box to sort assets by relevance, name, or the last date they were updated. Relevance sorts by the closest matches to your text searches, or, if you're not searching for text, it sorts by your most recently viewed assets.

Understand How Translations Affect Searching and Filtering

When you search of filter for assets in *all* languages, you may see results you don’t expect. If an asset is translated into multiple languages, one asset is considered the “master” and the other translated versions are considered secondary. If you filter for a specific language, assets of that language are displayed, as you would expect. However, if you set your language to **All**, the master version is displayed even if your search or filter matches only a translated version.

For example, if you filter for assets that have been recategorized, you may see an asset without the icon indicating recategorization ( ). In this case, the master version has been republished, clearing the recategorization notification on the master asset, but a translated version has not been republished yet.

To view all the languages associated with an item, select the item and click **Languages**. A new slide-out panel opens, showing you the translated versions of that asset.

View Performance Data

You can view performance data for assets to see the number of times an asset has been viewed or accessed by a user through a particular channel (like a site or portal).

To view performance data, on the Assets page, switch to performance view by clicking .

Callout	Description
1	A preview of the asset. Images are displayed in monotone. Hover over the asset tile to view the full-color preview of the image.
2	The asset name and asset type associated with the asset. Click the name to open the asset.
3	The number of times the asset has been viewed and the time frame of the performance data.
4	The trend direction and percentage. In the example shown above, the asset has been accessed 15% more this week than last week.
5	The bar chart shows the number of views the asset received each day for the last 14 days. The blue dot above a bar signifies that the asset was published on that day.

Hover over the asset tile to view a tooltip with the following information:

- The asset name
- The 14 day date range of the performance data
- The lowest number of daily views in the 14 day period
- The highest number of daily views in the 14 day period
- The date and time of any publication events in the 14 day period

For additional details and metrics, open the Analytics sidebar panel.

See also I don’t see performance data for an asset.

View Analytics

Pick a topic:

- Sites and Channels Analytics for the Repository
- Sites and Channels Analytics for a Specific Asset
- Consumption Analytics (Interactions)
- Video Usage

Sites and Channels Analytics for the Repository

To view analytics for the sites and channels associated with repository you're viewing, on the Assets page, click **More Actions**, then select **Content Analytics**.

Sites and Channels Analytics for a Specific Asset

To view analytics for the sites and channels an asset has been published or targeted to, select or open the asset, click , then, in the drop-down menu, select **Analytics**.

By default, you see all analytics data for the sites and channels the asset has been published or targeted to, but you can limit that by selecting a new option in the drop-down list (for example, the current year or the last 30 days). You see the following information about the channels the asset is targeted to:

- **Average Daily Access:** Line graphs show the average number of *unique visits* to each channel per day, broken down by published assets and non-published assets. A unique visit is one user, visiting one channel within a 1-hour period. So, if a user visits a site 20 times within 1 hour, it counts as one unique visit.
- **Asset Status:** Shows the age and status of the asset in each channel.
  - Published
  - Approved
  - Rejected
  - Draft
  - Translated
  - In Review

Consumption Analytics (Interactions)

You can view some performance data on the Assets page in performance view, but you can also view additional data in the Analytics sidebar panel.

If consumption analytics collection is enabled in your service, you'll see an **Interactions** tab. By default, you see analytics data for how the asset has been interacted with in the last seven days, but you can change that by selecting a different time period in the drop-down list. To download the data in a particular chart, click above the chart. You see the following consumption analytics for the asset:

- **Events**: This line chart shows the number of times the asset has been downloaded, loaded, played, and viewed.
- **Channels**: This bar chart table shows the channels to which the asset has been published and the number of times the asset has been downloaded, loaded, played, and viewed in each of those channels. At the bottom of the table, you see the totals for all channels.
- **Views By Region**: This map shows the number of views in each region represented by shaded areas. The darker an area, the more views. Hover over an

area to see the region name and metric data. Click the map, and then click + to zoom in or - to zoom out. Alternatively, if you have a scroll wheel, you can hover over the map and scroll to zoom in or out. Click and drag to the map to see other areas.

- **Top Countries**: This bar chart table shows the top ten countries with the highest interactions and the number of times the asset has been downloaded, loaded, played, and viewed in each of those countries.
- **Views By Browser**: This pie chart shows the number of views broken down by browser. Hover over a pie section to see the browser name, metric data, and percentage.
- **Views By Operating System**: This pie chart shows the number of views broken down by operating system. Hover over a pie section to see the operating system name, metric data, and percentage.

> **Note:**
>
> If the asset is published to a headless environment, you will see only load data.

Video Usage

If Video Plus is enabled in your service, you'll also see a **Video Usage** tab. By default, you see all analytics data for Video Plus assets, but you can limit that by selecting a new option in the drop-down lists (for example, the current year, the last 30 days, or a specific channel). You see the following video usage information about the asset:

- **File Name:** The name of the video file.
- **Player Loads:** The number of times the player has loaded on a page, whether the video was viewed or not.
- **Plays:** The actual number of times the video was played.
- **Average Completion Rate:** The percentage of plays that completed to the end.
- **Average Dropoff Rate:** The percentage of plays that didn't complete to the end.
- **Total Minutes Viewed:** The total number of minutes this video has played.
- **Top Countries:** The top five countries in which this video has been viewed. Includes data for how many times the player has loaded, the number of times the video was played, and the percentage of plays in this country.
- **Top Platforms:** The top five platforms on which this video has been viewed. Includes data for how many times the player has loaded, the number of times the video was played, and the percentage of plays on this platform.
- **Top Channels:** The top five channels in which this video has been viewed. Includes data for how many times the player has loaded, the number of times the video was played, and the percentage of plays in this channel.
- **Date Stamp:** Date and time the data was last updated.

View Conversation

To view the asset's conversation, select or open the asset, click , then, in the drop-down menu, choose **Conversation**.

You can participate in the conversation as needed.

View Inventory

To view an inventory of all assets that reference this asset or sites that use this asset, select or open the asset, click , then, in the drop-down menu, select **Inventory**. Inventory information is divided into tabs:

- **Dependencies**: This tab lists the names, types, and status of assets this asset references.
- **Referenced By**: This tab lists all assets that reference this asset.
- **Used In Sites**: This tab lists all sites that reference this asset and the pages it is used on.

> **Note:**
>
> If you don't see all of the tabs, you may need to click the or to scroll the tab headings.

Hover over an asset in either the **Dependencies** tab or **Referenced by** tab to enable . Click to preview the asset in a slide-out panel.

View Properties

To view the asset's properties, right-click or select the asset and choose **Properties** from the right-click menu or the **Sidebar** menu; or select or open an asset, click , then, in the drop-down menu, choose **Properties**. The properties include read-only information such as when the item was created and last updated.

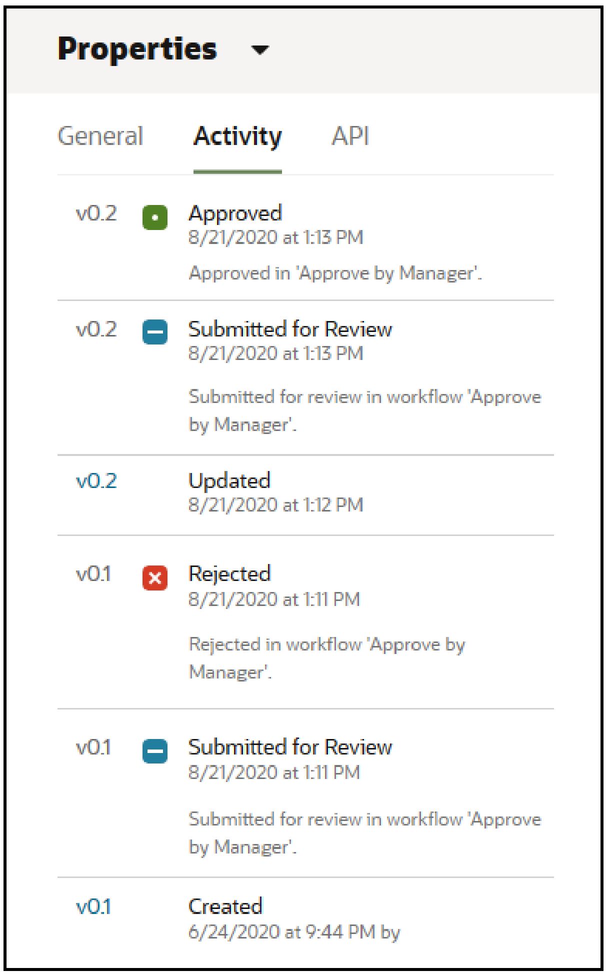
Property information is divided into tabs:

- **General** – includes general information about the asset such as name, description, asset type, version, size, and language. It shows the friendly URL slug if there is one and the asset URL, which you can copy by clicking . It also shows whether the asset has been published, when it was created and updated, and whether the asset is locked.
  If the digital asset image was created with a camera, whether that's an actual camera or a device like a phone, laptop, or webcam, you'll also see camera data (expand to view). The device embeds this data in the image file. It includes information such as the type of device, who took the picture, the time and date it was taken, where it was taken (GPS location), and camera information such as shutter speed, aperture, and lens information. This information can help you understand how the image was captured and, if you need to retake the picture, how to recreate or improve the image.
- **Activity** – details specific activities such as review status changes, revision history, and other activities.

- **API** – displays the asset ID, management URL, and, if published, the publishing information and delivery URL. To copy an ID or URL to the clipboard, click next to it. To view the associated JSON data for the asset, click { } next to the management or delivery URL.

View Activity (Asset History)

To view a list of previous versions of an asset, click the version number on the asset tile; or choose **Properties** from the right-click menu or the **Sidebar** menu, and then click the **Activity** tab.



- To view a previous version, click the version number in the Activity tab. You can only edit the current version.
- To make previous version current, view the previous version, and then click **Make Current** on the banner menu. If the current version is a video asset and the previous version is not, then you can't make the previous non-video version current.

When an asset is published, a new version is created and the number to the left of the decimal point is increased. For example, if you publish version v1.2, the published version becomes v2.

9 Organize Assets

There are several ways to organize your assets to make them easier to find:

- **Repositories**—All assets are managed in a particular repository, which you select when you add the asset. Users select a repository before searching for or working with assets.
- **Collections**—Collections are a way to group related assets for a specific business need such as a marketing campaign. You can create standard static collections or dynamic collections based on a search query. A new collection is also created automatically for each site. Assets can belong to one or more collections.
- **Full-text indexing**—Content items and digital assets such as PDFs, Microsoft Word documents, or other text documents are full-text indexed, so users can search for any text found in the content item or document.
- **Smart content**—If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content of the image.
- **Tags**—Tags, like keywords, are terms that a user might search for. If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content and colors in the image, but you can also add manual tags for any kind of asset. For example, you might have a document or content item about an upcoming conference. You could tag it with "conference", "event", "webinar", "breakouts", and other similar terms.
- **Categories**—If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset. Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.

Use Collections

A collection is a way to group a subset of assets within a repository. A repository may have many collections, but each collection is associated with only one repository.

A collection can be created in multiple ways:

- Website collection—When you create a website, you specify a repository for use with that website. A collection is automatically created when you create the website, and it’s associated with the repository used when you created the site. When you add assets to a website collection, those assets are available for use in that site.
- Standard collection—You can create a stand-alone static collection, which isn’t associated with a site. For example, you may have a repository with content pertaining to sports cars. You could use a collection to group together all assets for American sports cars, one for French sports cars, and one for Italian sports cars. The assets for all sports cars would be still be managed all together in the repository, but you could manage the subset of a particular type (for example, American sports cars) separately.
- Dynamic collection—Asset experts can create dynamic collections by defining complex asset search queries, choosing data fields, search operators, and values. They then share those dynamic collections so other users can quickly and easily filter assets that are relevant for a specific business task or their day-to-day activities.

Your access to collections depends on your role in both the repository and for the collection:

- If you have access to a collection, you have access to the assets in that collection, subject to granular permissions.
- You must be a contributor or manager for the repository to be able to create a standard static collection or a dynamic collection in the repository.
- You must be a contributor or manager for the collection to be able to add assets to the collection.
- You must be a manager for a collection to be able to manage it on the **Collections** page. You can translate a collection, share a collection, lock or unlock a collection, view the properties for a collection, or delete a collection.
- When viewing a repository on the Assets page, the Collection list in the Filters area includes the collections to which you have at least View access. Website and standard collections are signified by before their names, and dynamic collections are signified by .

Create a Standard Collection

Standard collections are a way to group content items, digital assets, and documents for a common use such as an external application or for marketing campaigns. You must be an enterprise user with Contributor or Manager access to the parent repository to create and share collections.

To create a standard collection:

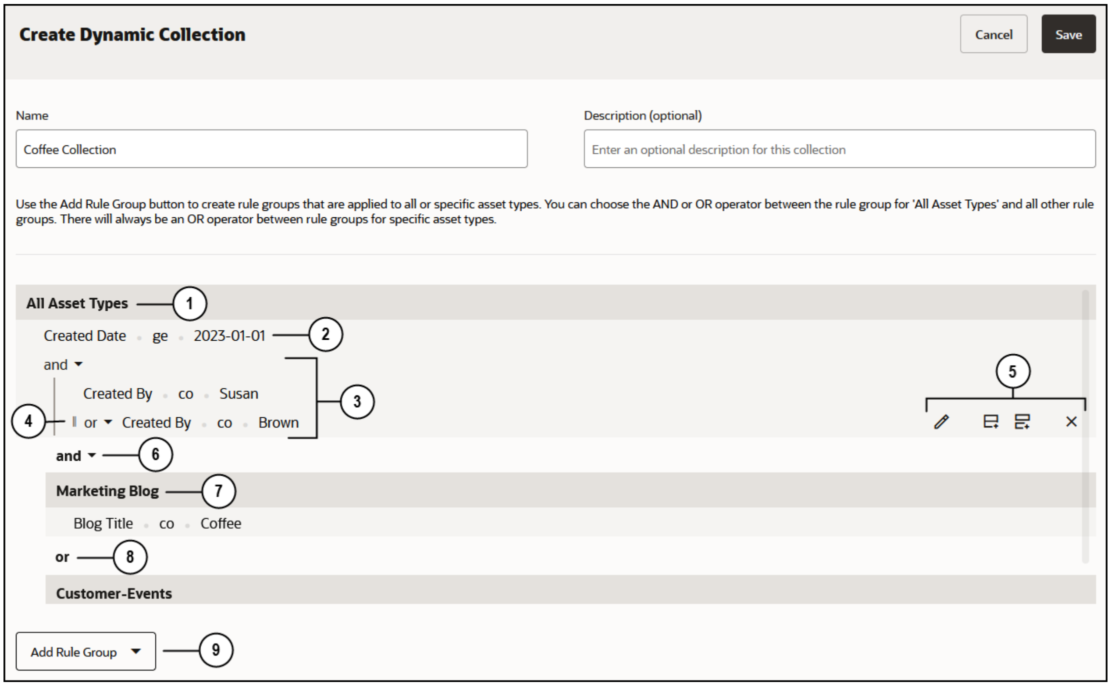
1. Click **Assets** in the left navigation panel.
2. The Asset view opens. Choose the repository you want to use then click **More Actions** and select **Collections**.
3. Click **Create**, and then choose **Standard Collection**.
4. Enter a name for the collection.
5. Optionally, choose the default publishing channels to associate with the collection.
6. Click **Create**.
7. Add assets to the collection.
8. If your repository administrator has enabled the collection Viewer role in the repository, you must share the collection with anyone you want to be able to use it.

To change a collection's name or channels, you must have Contributor or Manager access to the collection. Select the collection and click **Properties** from the menu bar or right-click menu. You can edit the details about the collection on the property page.

Create a Dynamic Collection

Dynamic collections are a way to group content items, digital assets, and documents based on complex search criteria. They're created by asset experts to then be shared with other users. You must be an enterprise user with Contributor or Manager access to the parent repository to create and share collections.

A dynamic collection is a search query made up of top-level *rule groups* that apply to all asset types or a selected asset type. Each rule group is made up of rules and, possibly, rule subgroups (nested rules). A rule is defined by a selected data field, an operator, and a value. If the top-level rule group applies to all asset types, you can search across the system properties that all assets contain. If the top-level rule group applies to a specific asset type, you can also search the data fields used in that asset type.



Callout	Description
1	This top-level rule group applies to all asset types.
2	This is a rule. This example rule filters assets with a "Created Date" greater than or equal to (ge) January 2, 2023.
3	This is a rule subgroup—a group of nested rules. These example rules filter assets with a "Created By" value that contains (co) "Susan" or "Brown".
4	Click and hold this icon ( ) to move this rule to another location.
5	• (**Edit Rule**)—Edit the rule. • (**Add Rule**)—Add a rule to this level. • (**Add Rule Subgroup**)—Add a rule subgroup below this level. • (**Delete**)—Delete this rule or rule subgroup.
6	Select whether the All Asset Types rule group should be additive (**and**) or exclusive (**or**) with all other top-level rule groups for specific asset types.
7	This is a top-level rule groups for a specific asset type.
8	The operator between all top-level rule groups for specific asset types will always be exclusive (**or**).

To create a dynamic collection:

1. Click **Assets** in the left navigation panel.

2. The Asset view opens. Choose the repository you want to use then click **More Actions** and select **Collections**.
3. Click **Create**, and then choose **Dynamic Collection**.
4. Enter a name, and, optionally, a description for the collection.
5. Add rule groups and rules to define the search query for the dynamic collection.
   - To add a top-level asset type rule group, click **Add Rule Group**, and then choose **All Asset Types** or a specific asset type. The asset type selection applies to all rules and rule subgroups in this top-level rule group.
   - To add a rule, hover over the rule group to which you want to add the rule, and click . You can also hover over a rule at the same level to which you want to add the rule.
     Define the rule by selecting a data field, selecting a search operator, and then entering a value. When entering a text value, you must press Tab or Enter after entering the value. When you're done defining the rule, click **Save**.
   - To add a rule subgroup (nested rules), hover over the rule group or rule to which you want to add the subgroup, and click . Define the nested rule.
   - Between rules and rule groups, select whether the rules should be additive (**and**) or exclusive (**or**).
     If you have a top-level **All Asset Types** rule group, you can select whether it will be additive or exclusive with all other top-level asset type rule groups. However, all other top-level rule groups for specific asset types will always be exclusive.
   - To move a rule, click and hold , and drag the rule to the desired location.
   - To edit a rule, click .
   - To delete a rule or rule subgroup, click . If you delete a rule group, all the subgroups and rules that it contains will also be deleted.
   - To expand or collapse a top-level rule group, click .
6. Click **Save** when finished.

If your repository administrator has enabled the collection Viewer role in the repository and you want to make this dynamic collection available to other users, you must share the collection with anyone you want to be able to use it.

To change a collection's name or channels, you must have Contributor or Manager access to the collection. Select the collection and click **Properties** from the menu bar or right-click menu. You can edit the details about the collection on the property page.

Share a Collection

Sharing a collection is done the same way you share folders: select the collection, click **Members**, and add members to the collection.

Here are some things to note about sharing collections:

- You must be an enterprise user with the manager role for the collection to share the collections with others.

- You can share a collection only with users and groups that are members of the parent repository.
- By default, if a user has access to a repository, they have implicit view access to all collections in that repository. However, if your repository administrator has enabled the collection Viewer role in the repository, you must share the collection with anyone you want to be able to see and use it.
- If you share a site with someone, they will be added to the site's collection with the same role they have for the site. You can change their role later if needed.

Add Assets to or Remove Assets from Collections

You can add an asset to a standard or a website collection when you create or upload it, or you can edit collection association at a later time. You must have Contributor or Manager access to the collection to be able to add assets to or remove assets from a collection.

Add an Asset to a Collection When Creating or Adding the Asset

When creating a content item or adding a digital asset, you can open the collection and create or add the asset directly in the collection.

Alternatively, click , then, in the drop-down menu, choose **Tags and Collections**. Click the **Collections** box, start typing a collection name, and then select the collection you want.

Add Existing Assets to a Collection

You can add or edit the collections an asset belongs to.

1. Find the assets you want to edit.
2. Right-click or select the assets, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Edit the current collections or add additional collections.
   If you selected multiple assets and some of the assets are already assigned to collections, you can click the collection, and then click **Assign to All** to assign the collection to all selected assets.

Remove Assets from a Collection

You can remove assets from a collection. Removing an asset from a collection doesn't delete it from the repository.

1. Find the assets you want to remove from a collection.
2. Right-click or select the assets, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Remove the collections.

Tag Assets

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

If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content and colors in the image, but you can also manually add tags to any kind of asset.

You can add tags to an asset when you create or upload it or edit the tags at a later time. You can search for items by using a tag as a search term, helping you find files quickly.

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

- Add as many tags you think you’ll need. Tags can describe the item, the place, the year, the subject matter or whatever you need to identify the object. You decide what tags you need.
- When adding tags, press **Enter** after each tag.
- Tags aren’t case-sensitive. “Lake” is the same as “lake” when you’re tagging.
- You can use special characters, such as asterisk (*) and parentheses (), but avoid doing so. It can make searching for the tagged object difficult.

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

Add Tags to Existing Items

You can add or edit tags to existing assets.

1. Find the assets you want to edit.
2. Right-click or select the assets you want to tag, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Edit the current tags or add additional tags.
   If you selected multiple assets and some of the assets already have tags assigned to them, you can click the tag, and then click **Assign to All** to assign the tag to all selected assets.

You can also tag items while creating the item.

Assign Asset Categories

If a taxonomy has been associated with the repository used to manage the assets you're viewing, you can view, assign, and remove asset categories to organize your assets.

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

To view and manage categories for an asset:

1. Right-click or select one or more assets, choose **Categories** in the right-click menu or the **Sidebar** menu, or click , then, in the drop-down menu, select **Categories**.
   You see the categories assigned to the selected assets. The taxonomy abbreviation precedes the category name.
2. Add or remove categories as necessary.
   - To add a category, click **Add Category**. If more than one taxonomy is assigned to the repository, you can change the taxonomy selection in the drop-down list. The taxonomy listed will default to the last one you used until you log out. You can search for categories or expand the taxonomy nodes to find the category or categories in the taxonomy you want to add, make your selections, and click **Add**. You can add more than one category to the selected assets at a time within each taxonomy. If you want to add categories from multiple taxonomies, you must finish adding the categories from one taxonomy first before selecting categories from another.
   - To remove a category, hover over the category, and then click .
   - If you selected more than one asset and one of the assets is assigned to a category you want to assign to all the selected assets, hover over the category, and then click .

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

   If you add or remove a category, an icon ( ) is displayed with the asset to show that it has been recategorized. You must publish the asset for the category changes to appear in publishing channels. Once you publish the asset, the icon is removed and returns only if the asset is recategorized again. Enable the **Recategorized** filter to see a list of all assets that have been recategorized to quickly determine which assets should be republished.

10
Review Assets

You can review assets with basic out-of-the-box approve/reject workflow, or, if configured, you might be able to take advantage of workflow from Oracle Integration. It's possible for different repositories to have different review or workflow options.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject workflow. To take advantage of additional workflow options, upgrade to the Premium Edition.

- Use Basic Review
- Change the Status of Assets
- Use Workflows

Use Basic Review

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject workflow. To take advantage of additional workflow options, upgrade to the Premium Edition.

If you need to get an asset reviewed, right-click or select the asset, then choose **Submit for Review** from the right-click menu or the **Workflow** menu.

If an asset is already submitted for review and you're a repository administrator, you can **Approve** or **Reject** the asset.

You can select multiple assets to submit for review, approve, or reject at the same time.

The submission status is shown below the asset preview:

- Draft
- In Review
- Approved
- Rejected

Change the Status of Assets

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

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

- The status of an asset can only be changed when you view the asset.
- Keep in mind that only managers or owners of a repository can change the status of an item. If a repository was shared with you and you don't have a Manager role, you won't be able to change the status. Also, you can't unpublish or delete objects that are being used. They must be removed from the website where they're used before the status can be changed.
- If you upload a new version of a digital asset, it's automatically labeled as Draft.
- In order to publish something (asset repositories only), you must have at least a Contributor role on the channel where the asset is managed.

An item's status is designated by its icon:

- Published
- Approved
- Rejected
- Draft
- Translated
- In Review

To change the status of an asset:

1. On the **Assets** page, right-click or select the asset.
2. Choose the new status from the right-click menu or the **Workflow** menu.

If the item has translated versions (asset repositories only), right-click or select the item, then choose **Manage Languages** from the right-click menu or the **Languages** menu in the actions bar.. You can only change the status of a translated version if it's been approved. If the item hasn't been approved, a status change isn't shown as a menu option.

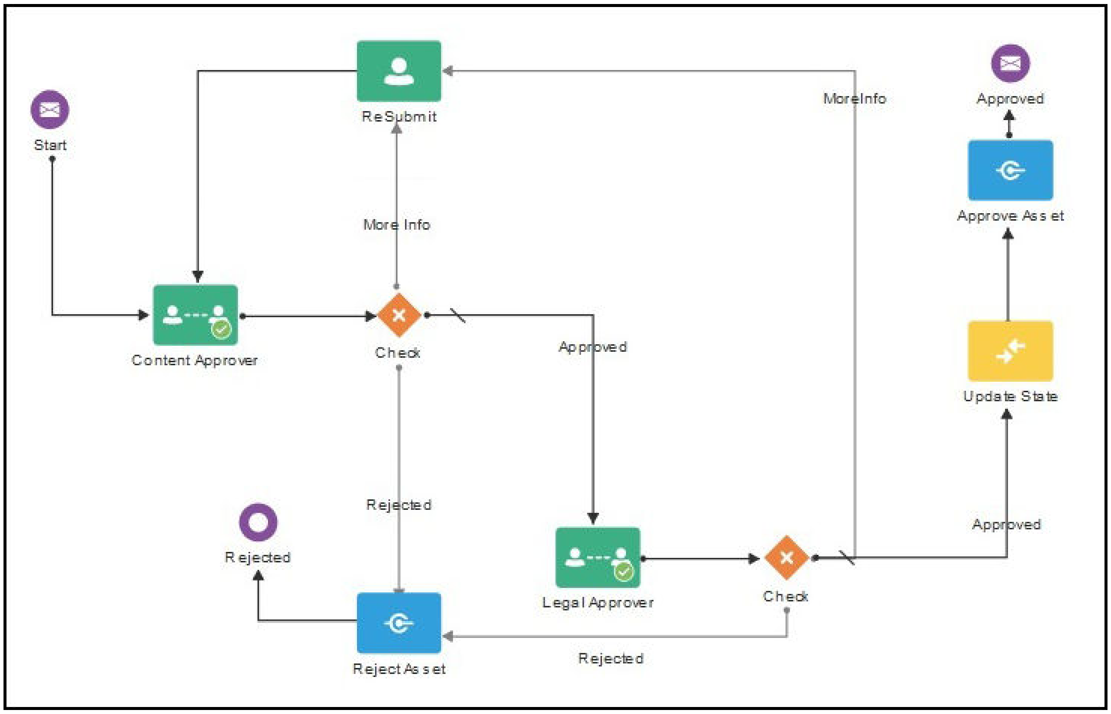
Asset Workflows

If your service and content administrators have configured Oracle Content Management to use additional workflow options, a change in asset status may be done automatically as an asset moves through a workflow. For more information on using additional workflow options, see Use Workflows.

Use Workflows

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject review functionality. To use workflows and take advantage of the full feature set, upgrade to the Premium Edition.

If your service administrator has integrated Oracle Content Management with Oracle Integration, and your content administrator has registered Oracle Integration workflows, you may have additional workflow options available to you. For example in the following diagram, an asset submitted to a workflow can either be rejected, returned for more information, passed on for additional approval, and then approved.



Once your content administrator has registered a workflow, assigned it to a repository, added you as a member, and assigned you to a workflow role, the workflow is available to use when working with assets.

The workflow pane has two tabs representing three possible workflow states:

- **Submit** (displayed if an asset has no workflows in progress)—This tab is where you submit the asset for review. You can submit an asset to only one workflow at a time, so if an asset is automatically submitted to workflow during creation or if the asset has already been manually submitted to workflow on its own or as a dependent of a parent asset, you won't be able to submit it to another workflow until the current workflow is completed. Some workflows may be selected by default (configured by your repository manager). If they're required workflows, you won't be able deselect them.

> **Note:**
>
> Assets added from Oracle Content Management or from third-party cloud storage providers currently don't support automatic workflow assignment.

- **In progress** (replaces the Submit tab once a workflow is initiated for an asset)—This tab lists the progress of the asset through the workflow. If you have a responsibility for a step that hasn't been completed, the actions you can take are available in a selection box. When an action is finished, the next step, if there is one, is added to the list. Completed steps identify the person and date when an action was taken. If the workflow has several completed actions, they may be grouped under an expandable heading labeled **Audit Trail**.
  When viewing a parent asset that has been submitted with its dependencies, the **In progress** tab of the Workflow pane shows the workflow steps, but the dependent assets show only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted.
- **Completed** (always displayed)—Displays a list of completed workflows for the asset if there are any, and the date each workflow was completed. Completed workflows can include both approved and rejected workflows. You can expand a completed workflow to see a detailed list of the actions in the workflow.

Select a topic to get started:

- Submit Assets to Workflow
- View Workflow Status
- Cancel Workflow
- Complete Your Workflow Tasks
- Workflow Process for Asset with Dependencies
- Working with Extended Workflow

Submit Assets to Workflow

> **Tip:**
>
> You might want to lock assets while they're in review so others can't modify them during the review process.

To submit assets to workflow:

1. On the **Assets** page, right-click or select the asset you want to submit to a workflow.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click [icon] to open the additional properties pane and select **Workflows** from the pane menu.
   If the asset hasn't been submitted to workflow, you'll see the **Submit** tab. If you see the **In progress** tab, the asset has already been automatically submitted to workflow during creation, or manually submitted to workflow on its own or as a

dependent of a parent asset. The current workflow must be completed before you can submit the asset to another workflow.

3. If the asset has dependencies, select whether you want to submit the asset's dependencies to workflow along with the asset.
4. Select a workflow from the list of available ones and click **Submit for Review** to initiate a workflow.
   Remember, some workflows may be selected by default (configured by your repository manager). If they are required workflows, you won't be able deselect them. If assets are automatically submitted to workflow during creation, you'll see an "already in review" section at the bottom of the tab; expand the section to see the workflow.

View Workflow Status

To view the workflow status for an asset:

1. On the **Assets** page, right-click or select the asset for which you want to view workflow status.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.

In Progress Workflow

If the asset is currently in workflow, you can see the status on the **In progress** tab. Completed steps identify the person and date when an action was taken. If the workflow has several completed actions, they may be grouped under an expandable heading labeled **Audit Trail**. Some assets may have extended workflow, where they remain in workflow even after being approved.

When viewing a parent asset that has been submitted with its dependencies, you see the completed workflow steps, but a dependent asset shows only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted. You can get to a dependent's parent asset from the **Referenced By** tab of the Inventory pane.

If you have a responsibility for a step, the actions you can take are available in a selection box. When the action is finished the next step, if there is one, is added to the list.

To cancel the workflow and return the asset to a draft state, click **Cancel Workflow**.

Completed Workflow

If an asset has been through workflows previously, click the **Completed** tab to see the history of workflows the asset has completed, including both approved and rejected workflows. Click a workflow to expand it and see a detailed list of the workflow actions.

Cancel Workflow

You must have initiated the workflow or be a service administrator to cancel workflow.

To cancel the workflow for an asset:

1. On the **Assets** page, right-click or select the asset for which you want to view workflow status.

2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.
3. On the **In progress** tab, click **Cancel Workflow**.
When canceling the workflow for a parent asset that has been submitted with its dependencies, the workflow will be canceled for the parent and its dependencies, the parent asset will be returned to a draft state, and the dependent assets will revert to their previous status (before being submitted with the parent asset).

Complete Your Workflow Tasks

There are several ways to view and take action on your workflow tasks:

- Workflow Notifications
- Workflow Tasks Page
- Asset Workflow Pane

Workflow Notifications

If you are assigned a role associated with a workflow step and have a responsibility to complete a workflow task, you'll receive an email notification with links to the actions available to you or to view the workflow online. Viewing the workflow online opens the asset in Oracle Content Management. Available actions are dependent on the workflow and are listed in the **Action** menu of the step for which you are responsible.

Workflow Tasks Page

To see a list of all workflow tasks for which you are responsible:

1. On the **Assets** click **More Actions** and select **Workflow Tasks**. A list of all tasks needing your attention across all repositories is displayed.
2. Take action. Available actions will depend on the workflow and your role.
   - Select the task you want to take action on and click the action you want to take in the banner menu. You can select multiple tasks and take an action across all selected tasks, provided the action is common to each task. For example, **Acquire** might not be available when multiple tasks are selected, but **Approve** and **Reject** might if you have review rights in the workflows used for the selected tasks.
   - To open the asset, click the asset name or select the task you want to take action on and click **Preview** in the banner menu. Then, in the Workflow pane, select the action you want to take from the **Action** menu of the associated task. **Preview** isn't available when multiple tasks are selected, because it pertains to previewing an individual asset.

Asset Workflow Pane

To move assets through workflow while viewing an asset:

1. On the **Assets** page, right-click or select the asset you want to submit to a workflow.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.

3. On the **In progress** tab, if you have responsibility for a step, select the action you want to take from the **Action** menu of the associated task in the workflow, add an optional comment, and confirm the action. When the action is finished the next step, if there is one, is added to the list.
   If you're viewing a dependent asset that was submitted with its parent, you see only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted. You can get to the parent asset from the **Referenced By** tab of the Inventory pane.

Workflow Process for Asset with Dependencies

When you submit an asset to workflow along with its dependencies, each dependency's status changes according to its existing status and workflow actions.

If...	Then...
A dependent asset is already approved	It stays approved. It won't be put into review with the parent asset.
A dependent asset is already in review as a dependent to another parent asset	It remains in its existing workflow. However, if the more recently submitted parent asset gets approved, the dependent asset will also be approved. Or, if the existing workflow gets rejected, the dependent asset becomes part of the workflow of the more recently submitted parent asset. **Note:** If the dependent asset was submitted to workflow on its own, it stays in its own workflow, and its status changes based only on actions in that workflow.
A dependent asset is marked as optional for publishing and has already been published	It won't be put into review with its parent asset because its latest version doesn't require publishing and therefore won't block publishing of the parent asset.
A dependent asset is already rejected	It's put into review with the parent asset.
A parent asset gets rejected	The dependent asset reverts to its previous status (before being submitted with the parent asset).
The workflow is canceled for a parent asset	The dependent asset reverts to its previous status (before being submitted with the parent asset)

To move the assets through workflow, you do so with the parent asset. While viewing a dependent asset, you can get to the parent asset from the **Referenced By** tab of the Inventory pane.

When viewing the parent asset, the **In progress** tab of the Workflow pane shows the workflow steps, but a dependent asset shows only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted.

Whether you're looking at the parent asset or one of its dependencies, the **Completed** tab of the Workflow pane shows all the activity for that asset.

Working with Extended Workflow

Extended workflow allows an asset to remain in workflow even after it has been approved, enabling you to complete additional workflow actions. For example, a content admin may set up a workflow to automatically publish after approval, but if there are validation or publication issues, the author is notified and asked to correct the issues, the asset stays in workflow, and the issue appears on the **In progress** tab of the Workflow panel.

- To find assets that have extended workflow, on the **Assets** page, select the **Approved** and **In Workflow** status filters.
- To view the workflow, select an asset, then choose **Workflows** from the right-click menu or the **Sidebar** menu, or click  to open the additional properties pane and select **Workflows** from the pane menu.

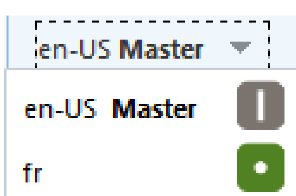
11 Localize Assets

Assets can be translated into multiple languages, if the associated repository allows for it.

> **Note:**
>
> - You can't localize assets in a business asset repository.
> - Only digital assets based on custom digital asset types can be localized. Those based on seeded digital asset types can't be.

Here are some things to keep in mind about localization:

- The available languages for a repository (and any of its assets) are determined by the localization policies of any associated publishing channels and any additional languages selected for the repository by the repository administrator.
- When submitting an item for translation the target language (locale) is identified by a code so the language service provider knows what language to translate the item into and return. For example, **fr** represents French and **de** represents German. Custom locales may be created by a developer based on your organization's needs. Custom locale codes include the base language, any regional dialect code if applicable, an **x** to designate it is a custom locale, and whatever other identifying customization is required by your organization. For example, a custom local for English might look like **en-JM-x-custom**.
- When an asset is created, it can be designated as non-translatable, which means the option to translate the item won't appear on the menu. An asset can also be designated as non-translatable in the languages panel.
- Localized versions of the asset exist separately from the original master version. You can delete a localized version, change its status, or edit it without affecting the master version.
- You can localize a batch of assets by exporting the files, translating them, and then importing the translated files, or you can add one translation at a time for a specific asset by translating the content in the content form (showing the fields from the asset type).
- To see what translations exist and the status of those translations, in the list of assets, click the down arrow next to the language.



Alternatively you can view this information in the languages panel.

You can create and manage translations in the following ways:

- Manage Language Assets
- Localize Asset Source Files
- Add a Language to an Asset
- Manage Asset Translation Jobs

Locales for Translation

When submitting an item for translation the target language is identified by a code so the language service provider knows what language to translate the item into and return. For example, **fr** represents French and **de** represents German.

These codes can be extended for more regional dialects. For example, **de-LI** is the code for German as it is spoken in Liechtenstein and **de-LU** is the code for German as it is spoken in Luxemburg. But if the language service provider doesn't support a regional dialect, then the code provided is truncated to the two character base language. For **de-LI** and **de-LU** the code would be truncated to **de**, for example.

If the language service provider supports one regional dialect but not all, it may substitute. For example, **ms-BN** is the code for Malay as spoken in Brunei, but if the language service provider doesn't support that dialect, it may switch to a dialect it does support, such as **ms-MY**, which is the code for Malay as it is spoken in Malaysia. If the language service provider doesn't make a distinction between dialects, for example **en-BZ** for English as spoken in Belize and **en-JM** for English as spoken in Jamaica, then it will truncate to the base language, in this case **en** for English.

Custom Locales for Translation

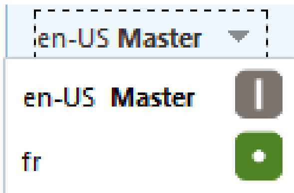
Custom locales may be created by a developer based on your organization's needs. Custom locale codes include the base language, any regional dialect code if applicable, an **x** to designate it is a custom locale, and whatever other identifying customization is required by your organization. For example, a custom locale for English might look like **en-JM-x-custom**.

Because a custom locale is unique to your organization, custom locale codes are truncated when submitted for translation to the base language and the regional dialect if supported by the language service provider. In the example above, **en-JM-x-custom** would be truncated to **en-JM**, eliminating the portion of the code specific to the customization. Or if the language service provider does not support the regional dialect code for Jamaica (JM), it may be truncated to just the base language, **en**.

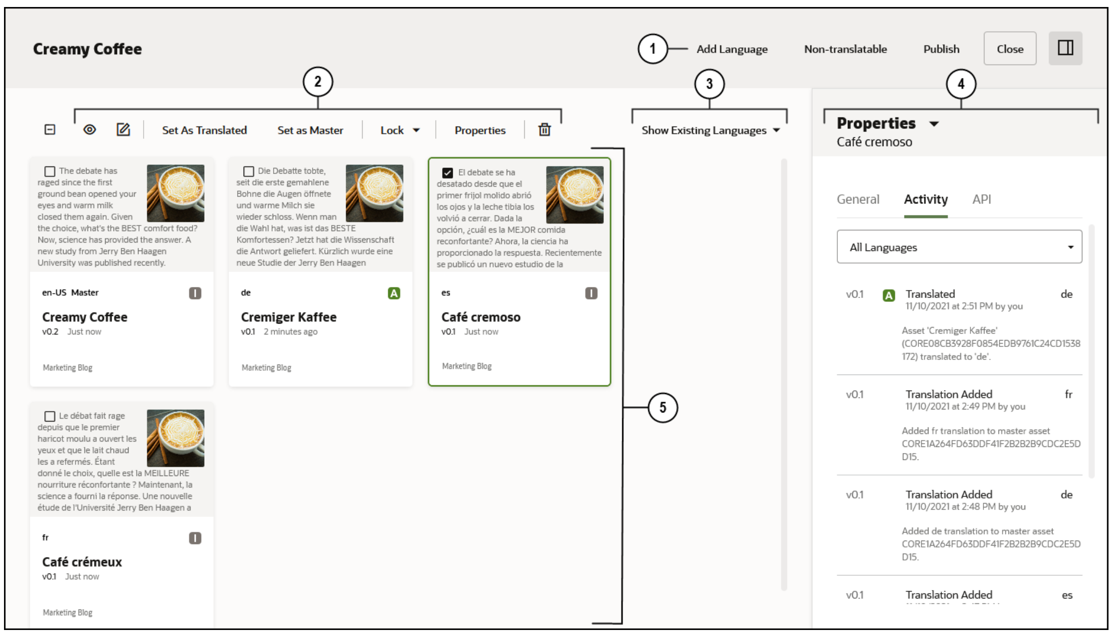
Manage Language Assets

> **Note:**
>
> This feature isn't available for digital assets based on seeded digital asset types, only custom digital asset types.

Assets can be translated for a localized experience based on the language requirements of a publishing channel. By default, the master version of an asset is displayed on the Asset page. To quickly see what languages exist and the status of those translations, in the list of assets, click the down arrow next to the language.



For additional options when working with language assets, choose **Manage Languages** in the right-click menu or the **Languages** menu in the actions bar to open a slide-out panel listing all the current language assets for a content item and their status. Selecting a language asset enables a banner menu with various options.



Item	Description
1	**Banner menu:** • **Add Language—**opens a slide-out panel to initiate translating an asset into a new language. • **Non-translatable—** removes all translations and leaves only the Master language. • **Publish—**opens a slide-out panel to publish the asset. • **Close—**closes the Language panel •  opens the properties pane.

Item	Description
2	**Actions menu:** enables options when an asset or assets are selected. Options vary depending on asset status and number of assets selected. They include: • opens the selected asset in a slide-out panel. • opens the selected asset in the editor. • **Set as Translated** marks an asset as translated and must be done before the asset can be submitted for review. • **Submit for Review** (in the **Workflow** menu) marks the asset as ready to be reviewed. Once submitted, the asset can be approved or rejected. • **Workflows** (in the **Sidebar** menu) opens the Workflows pane, so you can move the asset through workflow. • **Set as Master** changes which asset is the master asset. • **Lock**/**Unlock** enables you to lock or unlock assets so that users can't make changes to the asset. • **Properties** opens the Properties pane. This option might show up in the **Sidebar** menu. • deletes the asset or assets that are selected.
3	**Language Display Filter:** enables you to choose what languages are displayed: • **Show Existing Languages** displays languages specific to the content item (displayed by default). • **Show Repository Languages** displays all languages defined in the content item's repository. • **All Targeted Channels** displays the languages used in all targeted channels. • Specific channels
4	**Properties Pane:** details properties of the selected language asset.
5	**Language assets:** lists all current languages of an asset.

Localize Asset Source Files

You can localize an asset or a batch of assets by exporting the source files from the Assets page.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to adding translations for a single asset at a time; you can't localize a batch of assets. To take advantage of the full feature set, upgrade to the Premium Edition.

Alternatively, you can add a language to an asset by completing the content form in the new language.

Select a topic to get started:

- Export Assets for Translation
- Manually Translating Language Files
- Import the Translations

Export Assets for Translation

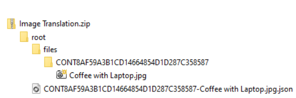
To export an asset or assets for translation:

1. Click **Assets** in the side navigation menu to see assets available to you. Select the repository of the asset or assets you are localizing.
2. Select the asset or assets you want to export for translation. You can select individual assets from the **Assets** page, or a whole collection of assets from the **Collections** page.
3. Click **Translate**. You may need to first click **More** and then select **Translate**.
4. Enter information for the batch of assets you're exporting — the translation job, and then click **Create**:
    a. Enter a name for the translation job.
    b. Select the source language.
    c. Select the target languages into which these assets will be translated.
    d. Select whether you want to translate the asset's dependencies along with the asset.
    e. Select whether to include only published versions of the assets. Including only published assets means any revisions of assets being worked on in the source language that have not yet been published will be excluded from the translation job. This is useful if content providers begin new drafts of assets in the source language as soon as the asset is published.
    f. Choose whether to export the translation package for manual translation (**Export Translation Package**), or select a translation connector to translate the package.
    g. If you selected a translation connector that includes additional data, enter it. Required fields are marked with "*".
    h. Click **Create** when done.
5. If you're manually translating the content, download the Zip file of the exported assets after the translation job has finished. Click **Translation Jobs** in the banner, select the translation job, then click **Download**. Then continue with manually translating the language files.
   If you're translating the content using a translation connector, there's no need to download a translation job Zip file. You can continue with importing the translations.

Manually Translating Language Files

The export Zip file you download contains a `root` folder (the source language folder) and `job.json` (describing the translation job and the exported files). The `root` folder contains a JSON file (the source language string files) for each asset you exported. The JSON files are named with the format *`asset_GUID`*-*`asset_name`*`.json`.

If you're translating digital assets that allow a separate native media file for each language, you'll also see a `files` subfolder in the `root` folder. The `files` subfolder contains a subfolder for each of these digital assets, named with the asset GUID. Those digital asset subfolders contain the native media files for the source language.



To manually translate the source language files:

1. For each language you selected as a target language, create a folder in the Zip file at the same level as the `root` folder, for example, `de`, `es`, and `fr`.

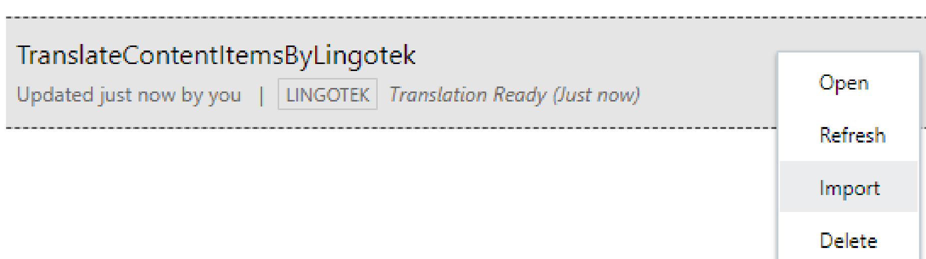
   > **Note:**
   >
   > If the translation job was created prior to December 2018, you must include a folder for each language you selected when creating the translation job. If the translation job was created after December 2018, you can translate a subset of the selected languages. For example, you could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

2. Copy the entire contents of the `root` folder to each language folder.
3. Translate the strings in all of the string files (the *`asset_GUID-asset_name`*`.json` files) to the appropriate languages. Do not delete any strings from the JSON files, and do not rename the files.
4. If you're supplying translated native media files for any digital assets, replace the source language files in the digital asset subfolders (/files/*`asset_GUID`*) with the translated ones.
5. Zip up the `job.json`, `root` folder, and all the language folders with the translated files.

Import the Translations

After translating the assets, import the translations:

1. If you're not already on the Translation Jobs page, go to the **Assets** page, click **More Actions** and select **Translation Jobs**.
2. Depending on whether you translated the source files manually or with a translation connector, you'll import the translations in different ways:
   - If translating the content manually, in the upper right corner, click **Import Translation File**. Click **Upload**, select the Zip file of translated assets, then click **Open**. After uploading the file, click **OK**.
   - If translating the content using a translation connector, right-click on the finished translation job and select **Import**.



3. Oracle Content Management validates the translation package. If you want to see which assets are included in the translation job, click the link in the dialog.

If the translation job includes native media files, any translated language with a missing native media file will use the source language file, or, if this is an update to a previously translated language, the existing translated file will be retained.

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

Add a Language to an Asset

> **Note:**
>
> Only digital assets based on custom digital asset types can be localized. Those based on seeded digital asset types can't be.

You can localize an asset or a batch of assets by exporting the source files from the Assets page, or you can add a language to an individual asset by completing the content form (showing the fields from the asset type) in the new language.

Follow these steps to add a language to an asset:

1. Right-click or select an asset, then choose **Manage Languages** in the right-click menu or the **Languages** menu in the actions bar.
2. Click **Add Language** in the banner menu, or filter the displayed languages to display repository or channel languages and click one of the available languages.
3. Complete the content form, using the appropriate language for all fields:
For content items:
   a. Enter the name for the translated item and an optional description.
   b. Choose the language from the available languages. The languages shown are those that are allowed in the repository and haven't yet been used for the item.
   c. For each content item data field, enter the translated language version of the data in the fields. To compare or copy the text from another language, click **Compare** at the top of the form, and select the language to which you want to compare. To copy all the data values from the selected language into this new translated version, click **Copy All**. To view or copy the value for a particular data field, use the controls under the data field.
   d. Click **Save** when done.

   For digital assets:
   a. Choose the language from the available languages. The languages shown are those that are allowed in the repository and haven't yet been used for the item.
   b. If the associated asset type allows a separate native media file for each language, click **Add**, then select whether to copy the file from an existing language or add a new media file from your computer or from Oracle Content Management Documents.
   c. For each asset attribute, enter the translated language version of the data in the fields. To compare or copy the text from another language, click **Compare** at the top of the form, and select the language to which you want to compare. To copy all the attribute values from the selected language into this new translated version, click

Copy All. To view or copy the value for a particular attribute, use the controls under the attribute field.

d. Click **Save** when done.

> **Note:**
>
> There may be some fields designated as **Inherit from master**. These fields are prepopulated from the master asset and cannot be edited or translated. They are specified when the asset type is created.

4. Once an item has been translated, before it can be submitted for review or published, you must change the status to translated. Select the translated item and click **Set As Translated** in the banner menu. You can now submit the translated item for review.

Manage Asset Translation Jobs

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

> **Note:**
>
> - If you're using Oracle Content Management Starter Edition, translation jobs aren't supported. To take advantage of the full feature set, upgrade to the Premium Edition.
> - Only digital assets based on custom digital asset types can be localized. Those based on seeded digital asset types can't be.

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

To see a list of translation jobs, on the **Assets** page, click **More Actions** in the banner menu, then select **Translation Jobs**. The Translation Jobs page lists all translation jobs and their status:

- (Ready) - The .zip file of exported assets is ready to be downloaded.
- (In Progress) - The .zip file has been downloaded. The status will remain in progress until all translations for all targeted languages have been imported successfully.
- (Complete) - The translations for all targeted languages for this job have been imported successfully.
- (Failed) - The translation job failed. You should have seen a failure message above the banner about why the job failed. If you need to see the message again, click **Details** in the translation job listing. To resubmit a failed job, select it and

choose **Resubmit** in the right-click menu or actions bar. The original job is deleted and a new one submitted.

You can perform the following actions:

- To search for translation jobs by name or custom attributes, enter your search terms in the search box.
- To filter or sort the list of translation jobs, select options in the drop-down lists at the top of the list.
- To view the details of a translation job, open it. The details include the source language, all the selected targeted languages, any additional data fields included in the translation, and the status of those translations.
- To download the .zip file of exported assets for a job, select the job, and click **Download**.
- To delete a job, select the job and click **Delete**.
- To import translations, click **Import**, then click **Upload**, select the .zip file of translated assets, then click **OK**.
  Oracle Content Management validates that all the translations that are defined in the job are available in the .zip file. If you want to see which assets are included in the translation job, click the link in the dialog. When you're ready to import the translations, click **Import**.

View Asset Translation Job Details

On the Translation Jobs page, click a translation job to view its details.

The translation job details lists the following information:

- The translation job name and repository.
- The status of the job:
  - (Ready) - The .zip file of exported assets is ready to be downloaded.
  - (In Progress) - The .zip file has been downloaded. The status will remain in progress until all translations for all targeted languages have been imported successfully.
  - (Complete) - The translations for all targeted languages for this job have been imported successfully.
  - (Failed) - The translation job failed. You should have seen a failure message above the banner about why the job failed. If you need to see the message again, click **Details** in the translation job listing. To resubmit a failed job, select it and choose **Resubmit** in the right-click menu or actions bar. The original job is deleted and a new one submitted.
- When the job was last updated.
- The source and target languages, and the status of each target language.

If your translation uses a translation connector, you'll see additional information:

- The translation connector used for the job.
- The status of the translation. Click **Refresh** to refresh the translation job details.

- If your translation connector provides validation data of the upload to Language Service Provider step, you can download the details in a JSON file by clicking . You can also view validation data for the assets by expanding the **List of assets**. The validation data includes whether the fields or attributes and any associated native files are translatable. If the connector encounters any problem while uploading the asset to the Language Service Provider, an error would be shown.

To import the translations:

1. Click **Import**.
2. Oracle Content Management validates the translation package. If you want to see which assets are included in the translation job, click the link in the dialog.
   If the translation job includes native media files, any translated language with a missing native media file will use the source language file, or, if this is an update to a previously translated language, the existing translated file will be retained.
3. When you're ready to import the translations, click **Import**.
   The status of the import appears above the banner. You can view the details of the job by clicking **Details**.

12 Publish Assets

You publish assets to make them available for use in sites or other channels. You can publish assets immediately or schedule them to be published at a later time and date.

> **Note:**
>
> You can't publish assets in business asset repository.

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

- Some channels may require assets to be approved before they can be published.
- If you're publishing an asset and it's been translated, the version you're publishing must be set as translated before it can be published. Select the translated version, and click **Set as Translated** to show that the version has been approved.
- If you select multiple assets to publish, all the channels the assets are targeted to will be shown. For example, if you have two assets that are targeted for publishing to Channel A and one asset targeted to Channel B, then "Channel A (2)" and "Channel B (1)" appears in the Channel list, indicating the number of assets targeted to each channel.
- You can't publish assets until they have been validated against the policies of the channels to which they'll be published. After validating, you see results showing you which assets follow the policies and which do not.
- When an asset is published, a new version is created and the number to the left of the decimal point is increased. For example, if you publish version 1.2, the published version becomes version 2.
- For scheduled publishing, any new versions that were created between the time of scheduling and publishing will be renumbered. For example, if you scheduled publishing of version 1.2, then created versions 1.3 and 1.4, the published version becomes version 2, version 1.3 becomes version 2.1, and version 1.4 becomes version 2.2.

You can manage publishing in the following ways:

- Publish a Digital Asset While Viewing It
- Publish a Content Item While Creating It
- Publish a Content Item While Viewing It
- Publish Assets from the Assets Page
- Create an Empty Recurring Publishing Job
- Manage Scheduled Publishing Jobs
- View Publishing Jobs History and Logs

After you publish assets, you can:

- Add them to sites, see Work with Assets and Content Items.

- Access published assets digital assets through a URL.

Assign Publishing Channels

To view the asset's channels, select or open the asset, click , then, in the drop-down menu, choose **Channels**.

To associate a new channel with the asset, click **Add**, select a channel, and click **Add** again.

To remove a channel, select it, and click **Remove**.

Publish Assets from the Assets Page

To publish an asset from the Assets page:

1. On the **Assets** page, right-click or select the assets you want to publish.
2. Choose **Publish Now** or **Publish Later** from the right-click menu or the **Publish** menu. If the asset is already scheduled for publishing, you won't see the Publish Now option.
3. If you selected **Publish Later**:
   a. Enter a name for the publishing job so you can easily find it on the publishing calendar.
   b. Optionally, enter a description to help understand what this job is used for.
   c. Select when you want to publish.
   d. If you want to publish content on a recurring basis, choose the frequency in the **Recurrence** drop-down list. If you choose **Custom**, you'll see additional options (for example, you can set the job to run every two weeks on Tuesdays). You can also select an end date. Note that the recurrence schedule can't be changed after the job is created.

   The selected assets are added only to the first instance of the recurring job; other instances of the recurring job will be empty and you'll need to add assets to them.
4. If you've locked any assets, you can automatically unlock them by selecting **Unlock assets locked by you automatically after publishing**. If you don't want to unlock assets after publishing, make sure to clear this option.
5. If necessary, select a publishing channel. Assets can be pretargeted to a particular channel, making it easy for you to publish them using that channel, or you can select an alternative channel to use for the asset.
   If you need to select a different channel click **Selected**, select one or more channels.

   The channel selection can't be changed after the job is created. If you select **Targeted**, channels will be targeted based on the assets in the job.
6. Oracle Content Management will automatically validate the assets as part of the publishing process by comparing the assets to the approval and localization policies of the channel. If you'd prefer to see a validation report *prior* to publishing, click **Pre-Validate**. Please note that generating the validation report may take a long time.

7. When you're ready to publish, click **Publish** (if you selected to publish now) or **Schedule** (if you selected to publish later).
   Oracle Content Management validates the assets by comparing the assets to the approval and localization policies of the channel. If all assets are ready, Oracle Content Management publishes them. The status is shown in the banner.
8. If any errors occur during publishing, the status shown in the banner includes a link to **View Validation**.
   The validation results list the status of the selected assets, any associated translations, and any dependent assets, showing whether the assets adhere to the approval and localization policies that were set for the channel. You must correct any issues before attempting to publish again. For example, if another version of the asset is already scheduled for publishing, you must schedule publishing for a date later than the previously scheduled publishing.

   You can perform the following actions:

   - You can filter the results by channel or by status.
   - To view an asset in a slide-out panel without leaving the Validation Results page, click next to the asset.
   - To remove an asset from publishing, click the X next to the asset.

If you scheduled your assets to publish later, the asset versions are reserved for publishing, allowing you to work on new versions as necessary. You can view the calendar of publishing jobs on the Scheduled Publishing page.

You can view the history of all publishing jobs on the Publishing Jobs page.

Create an Empty Recurring Publishing Job

You might want to create an empty recurring job. For example, maybe you want a job that runs every Monday to publish new content your contributors have produced. You could create an empty job and add your contributors as managers of the job so they can add their content.

To create an empty recurring job:

1. On the **Assets** page, click **More Actions** in the banner menu, then select **Scheduled Publishing**.
2. Click **Schedule Job**.
3. Enter a name for the publishing job so you can easily find it on the publishing calendar. You might want to also include a description so others know the purpose of this recurring job.
4. Select when you want to start publishing.
5. Choose the frequency in the **Recurrence** drop-down list. The recurrence schedule can't be changed after the job is created.
6. Select an end date.
7. If necessary, select a publishing channel. Assets can be pretargeted to a particular channel, making it easy for you to publish them using that channel, or you can select an alternative channel to use for the asset.
   If you need to select a different channel click **Selected**, select one or more channels.

   The channel selection can't be changed after the job is created. If you select **Targeted**, channels will be targeted based on the assets in the job.

8. Optionally, add assets to the first instance of the job by clicking **Add Assets**, selecting the assets, and then clicking **Validate**.
9. When you're done, click **Schedule**.

Manage Scheduled Publishing Jobs

When you schedule assets for publishing, a *publishing job* is created. You can then view the publishing schedule, and edit or cancel pending jobs.

To see the publishing schedule, on the **Assets** page, click **More Actions** in the banner menu, then select **Scheduled Publishing**. The Scheduled Publishing page shows a calendar of all publishing jobs and their status:

- (Scheduled) - The one-time publishing job hasn't started yet.
- (Recurring) - The recurring publishing job hasn't started yet.
- (In Progress) - The publishing job is in progress.
- (Completed) - The publishing job completed successfully.
- (Canceled) - The publishing job was canceled.
- (Failed) - The publishing job failed. You should have seen a failure message above the banner about why the job failed, but you can also see it by clicking the job. Correct the problem, then reschedule the job.

You can perform the following tasks:

Task	Description
View job details	To view a publishing job, click it, then click **Open**. The details include the job name and description; the scheduled publishing date and time; if it's a recurring job, the frequency and end date; when the job was last updated and who updated it; and the validation details. To view an asset in a slide-out panel without leaving the job details page, click next to the asset. Additional information is included in the job properties. If the properties aren't already displayed, click **View Properties** or . The properties enable you to edit the job name and description; for recurring jobs, this affects the whole series. The properties also include when the job was created and who created it; when the job was last updated and who updated it; when the job will start; the end date for recurring jobs; and the frequency for recurring jobs.

Task	Description
Add managers to a job	To add users you want to be able to manage the job, click **Open**, then click **Add Managers**. If you add managers to a recurring job, they will be added to all instances of the job
Update the assets to the latest versions	If any of the assets included in the job have newer versions, you can update the job to include the latest versions by clicking **Update Versions**. You can see each asset's version number in the list of included assets.
Edit a pending job (including adding assets)	To edit a pending publishing job, click it, click **Open**, then click **Edit Job**. For one-time jobs, you can change the job name and add or remove assets. For recurring jobs, you can change the description for this instance of the job or add or remove assets. To change the name or description of the whole job series, view the job properties. **Note:** When the publishing job finishes, Oracle Content Management will send an email to all of the job's managers with the status of the job.
Cancel a scheduled job	To cancel a job, click it, then click **Cancel Job**. If it's a recurring job, you can cancel all recurrences or just the one you opened.
Copy a completed job	Top copy a completed job, click it, click **Open**, then click **Copy**.
Filter or search for the jobs shown in the calendar	If necessary, click  to show the filter pane. Search for a job name or description, then click a result to see the job in the calendar. Filter the jobs by job status, hide weekends, or show only jobs you've scheduled.
Change the calendar view	Change the view of the calendar to day, week, or month, using the buttons at the top right of the calendar.
Jump to a particular date	Jump to a particular date by clicking a day in the date picker in the filter pane.

Task	Description
Create an empty recurring job	You might want to create an empty recurring job. For example, maybe you want a job that runs every Monday to publish new content your contributors have produced. You could create an empty job and add your contributors as managers of the job, so they can add their content. To create an empty recurring job, click **Schedule Job**.

You can view the history of all publishing jobs on the Publishing Jobs page.

View Publishing Jobs History and Logs

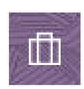
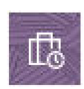
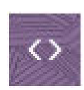
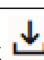
You can view the history and details of all past asset publishing jobs.

To see the publishing event logs, on the **Assets** page, click **More Actions** in the banner menu, then select **Publishing Jobs**.

To filter the list by job type, select an option in the first drop-down list. You can view all, completed, failed, publish now, publish later, and publish HTML jobs.

By default, you see 50 jobs per page. To change this, select a new value in the second drop-down list.

The following information is available for each publishing job:

Task	Description
Name	The name of the publishing job. Non-scheduled jobs are named "Publishing Job" followed by the date of the job. An icon representing the type of job appears before the name: •  Publish now job •  Scheduled job •  Rendition (publish HTML) job
Status	•  (Published) - The publishing job completed successfully. •  (Failed) - The publishing job failed.
Published	The date and time of the publishing job.
Published By	The user who initiated the publishing job.
Publish Log	Click  to download a JSON log of the publishing job.

Task	Description
Rendition Log	Click to download a JSON log of the renditions (published HTML) created by the publishing job.

To view additional information about a job, select it, and then click . The Properties pane shows information such as the job description and publishing channel.

Access Published Digital Assets Through a URL

Published digital assets are also accessible using the shorter URL path `https://`*`your-domain`*`/content/assets/` (for example, `https://`*`instanceName-accountName`*`.cec.ocp.oraclecloud.com/content/assets/`). This path is open for search bots to crawl the assets. Use this path to access the digital asset's file content if you want your digital assets, such as PDF files, to be indexed by search engines.

13 Manage Assets

As an asset user, you can perform the following tasks:

- Lock or Unlock Assets
- Archive Assets
- Delete Assets
- Manage Image Renditions

Lock or Unlock Assets

You can lock an asset to keep users from editing the asset. For example, you may want to do this if you're waiting for approval or translation.

Here's what you need to know about locking an asset:

- Any user who can view an asset can lock it, but to unlock it you must have been the one to lock it, or you must have the Manager role for the repository.
- You can lock or unlock multiple assets at the same time.
- If the asset has dependencies, you can lock just the asset or the asset and its dependencies.
- If the asset has translations, locking it from the Asset page will lock only the version selected in the language drop-down list. To lock translated versions, do so from the Languages panel.

To lock one or more assets from the Assets page:

1. On the **Assets** page, select the assets you want to lock.
2. Choose **Lock Assets** or **Lock Assets and Dependencies** from the **Lock** menu in the actions bar or the right-click menu.

To lock all the assets in a collection:

1. On the **Assets** page, click **More Actions** and select **Collections**.
2. Select one or more repositories.
3. Choose **Lock Assets by Collection** from the **Lock** menu in the actions bar or the right-click menu.

To lock specific translated versions of an asset:

1. Right-click or select the asset.
2. Choose **Manage Languages** from the right-click menu or the **Languages** menu in the actions bar.
3. Right-click or select the language you want to lock.
4. Choose **Lock Assets** or **Lock Assets and Dependencies** from the right-click menu or the **Lock** menu in the actions bar.

To unlock an asset, instead choose **Unlock Assets** or **Unlock Assets and Dependencies**.

Archive Assets

You may have assets that aren't currently being used, but you're not ready to delete them yet. You can *archive* those assets. Archived assets are billed at 1/200th the cost of normal assets.

To archive an asset:

1. On the **Assets** page, select the item you want to archive.
2. Click .

To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.

Here are some things to consider when you archive assets:

- You can’t archive published assets. The asset must first be unpublished and then it can be archived. If you select a published asset, the archive option is not available.
- You can’t archive assets that are used in a site.
- You can't archive assets that are locked.
- You can't archive Video Plus assets.
- You can’t archive an asset that’s being used in a content item. For example, if an image is referenced in a content item, you can’t archive that image.
- You can't modify assets while they are archived.
- The asset's approved or rejected status is maintained when it's archived. If the asset is in review when it's archived, its status changes to draft.
- If you archive a master in a set of translated assets, all of the translations are also archived.

You can also access and perform actions on archived assets through the REST API.

Manage Archived Assets

You can view, download, restore, or permanently delete an archived asset.

To view archived assets, on the **Assets** page, select a repository, click **More Actions** in the banner menu, then select **Archived Assets**.

You can search and filter archived assets as you would any other asset, with the addition of being able to filter by restoration status.

When you right-click or select an archived asset, or while you're viewing an archived asset, you can perform the following actions. Depending on the size of the window, you might need to click **More** on the Archived Assets page or **Actions** while viewing an archived asset to see some of the options.

Task	Description
Download the asset	To download a digital asset to your computer: • On the Archived Assets page, choose **Download** in the right-click menu or click in the actions bar or on the asset tile. • While viewing an archived asset, click **Download** in the banner menu. You can download only digital assets, not content items.
View the asset's attributes	You can only view the asset's attributes while viewing the asset. To view the attributes, click **Attributes** in the banner menu; or , then, in the drop-down menu, select **Attributes**.
View the asset's properties	To view the asset's properties: • On the Archived Assets page, choose **Properties** in the right-click menu or the actions bar, or click . • While viewing an archived asset, click **Properties** in the banner menu; or , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.
Open the asset	To open the asset, on the Archived Assets page, choose **Open** in the right-click menu, or click in the actions bar or on the asset tile.
Restore the asset	To restore an archived asset: • On the Archived Assets page, choose **Schedule Restoration** in the right-click menu or the actions bar. • While viewing an archived asset, click **Schedule Restoration** in the banner menu. Restoring an asset my take up to 24 hours. While the asset is pending restoration, you'll see a banner on the asset tile saying "Restoration Scheduled".
Cancel restoration	To cancel a pending restoration, choose **Cancel Restoration**. • On the Archived Assets page, choose **Schedule Restoration** in the right-click menu or the actions bar. • While viewing an archived asset, click **Schedule Restoration** in the banner menu.
Permanently delete the asset	You can only delete an archived asset from the Archived Assets page. To permanently delete the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar.

Delete Assets

> **Important:**
>
> When an asset is deleted, it is permanently removed. Assets are not moved to Trash where they can be recovered later. If you're not ready to permanently delete the asset, you can instead archive the asset.

To delete an asset:

1. On the **Assets** page, select the item you want to delete.
2. Click .

Here are some things to consider when you delete assets:

- You can't delete published assets. The asset must first be unpublished and then it can be deleted. If you select a published asset, the delete option is not available.
- If you delete a master in a set of translated assets, all of the translations are also deleted.
- You can't delete an asset that's being used in a content item. For example, if an image is referenced in a content item, you can't delete that image.

14 Use Recommendations

Recommendations are a way to provide personalized experiences for website visitors by showing assets based on audience attributes such as location or areas of interest.

Note:

- If you're using Oracle Content Management Starter Edition, you're limited to only one recommendation. To increase the number of recommendations and take advantage of the full feature set, upgrade to the Premium Edition.
- Recommendations can't be associated with business repositories.

Recommendations are associated with a repository and a specific content type, and the recommendation rules compare values in a content type field with values from audience attributes. Attributes can be unique to a session, such as location information based on the IP address of a site visitor, unique to a system, such as the current date, or other custom attributes defined by an administrator, such as what product interests a site visitor. For example, site visitors with European IP addresses may first see event announcements for Europe on the site home page, while site visitors from North America will see events in the U.S. and Canada.

When used in a site, a recommendation selects and displays assets available in a repository that satisfy all the rules defined in the recommendation, helping you easily provide a personalized experience to the site visitor. You place recommendations on a site page by adding the Recommendation component.

Recommendations can be submitted for review and published by anyone who is a content contributor to the associated repository. However, even if you don't have contributor rights, you can still view and test recommendations to see how they work before using them in a site or headless experience.

- View Recommendations
- Create Recommendations
- Define Audience Rules
- Test Recommendations
- Publish a Recommendation
- Example Recommendation

View Recommendations

To view a list of available recommendations, click **Recommendations** in the side menu and select the repository for the recommendations you want to view.

To see the list of rules and audience attributes of a specific recommendation or test a recommendation, right-click or select it, then choose **View** in the right-click menu or click in the actions bar.

Click on the tab of the information you want to view.

- **General** — shows the details of a recommendation, such as name, API name, associated content type, channels, and any fallback assets.
- **Rules** — lists the rules defined for the recommendation used to find recommended assets.
- **Test** — allows you to apply values for the audience attributes and test to see what recommendations are made. Until values are applied, designated fallback assets are displayed.

> **Note:**
>
> When testing assets, set the asset status to **Published** and select a channel, which is useful to see what will be displayed when the recommendation is used, or set the asset status to **Management** for all channels, to see what assets are available in a repository that meet the rules of the recommendation.

Create Recommendations

Remember, recommendations are part of a repository and the rules defined in the recommendation are associated with a specific content type. Anyone with rights to contribute to a repository can create a recommendation.

1. Click **Recommendations** in the side menu and select the repository to use.
2. Click **Create**.
3. Enter a name for the recommendation. It cannot contain the following characters: ' ; " : ? < > % *

   > **Note:**
   >
   > The required API Name is generated automatically, or you can overwrite the auto-generated name. The API Name cannot contain the following characters: ' ; " : ? . , < > % * tab space

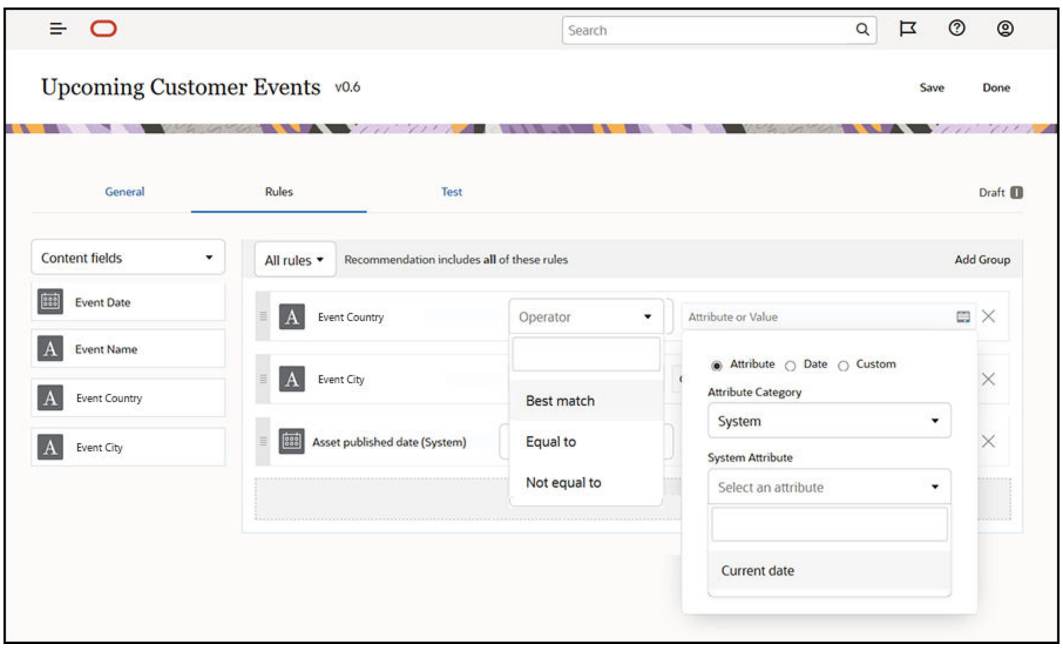
4. Enter an optional description.
5. Select a content type. The content type determines the fields available when defining rules for the audience attributes.
6. Choose an optional channel where the recommendation will be published.
7. Choose the order in which you want the results displayed. Options include by relevance or publication date.

8. Select one or more fallback assets to use if no other content matches the criteria defined in the audience rules.
9. Click **Create**.

Define Audience Rules

After creating a recommendation, you must define the audience rules used to identify and display personalized content.

1. On the rules tab of a recommendation, select **Content Field**, **Metadata**, or **Taxonomies** from the selection menu.
2. Select the content field, metadata field, asset category or asset taxonomy, and drag it into the rules area. Content and metadata field options include all indexed fields available in the content type selected when creating the recommendation. Non-indexed fields such as Large Text, Relationship, and JSON fields are not available. Asset category and asset taxonomy are available if **Taxonomies** is selected from the menu.
3. Select the operator to use. Available options are dependent on the type of content field used. Taxonomies only support the **Equal to** operator.



4. Click  and select an audience attribute or enter a specific value to validate.
   - For content or metadata fields, when defining date fields, you can add custom functions for date fields to automatically define dates and date ranges. For example, you can specify an event recommendation to list events between now and the end of the month. If selecting **Start of Day** or **End of Day** attributes, you can set an offset to begin or end the results a number of days before or after the current day.

     You can also enter a list of values if the rule uses an operator compatible with list values, such as Equal to, Not equal to, or Best match. Items in a list of values must be separated by a new line. For example, a rule using the **Equal to** operator and matching a sports interests field could take a list of values on new lines such as:

```
basketball
baseball
soccer
```

In this case the rule would match if the content field has the value basketball, the value baseball, or the value soccer.

- For asset category or asset taxonomy, only **Custom** is available as a valid attribute category. When testing, you will need to select a value for the custom audience attribute.
- If you enable **Include children** for an asset category rule, then all assets that match the given category along with assets matching its descendants will be part of the result set.
- All multi-value options in a single rule will use the **OR** operator.

5. When you've finished making your selections for a rule, click **Done**.
6. Continue to create additional rules if necessary. You can add as many rules as you need to return the results you want.

   When creating multiple rules, select whether to validate all rules (this rule AND that rule) or to validate any rule (this rule OR that rule). If you select **All**, then all rules must be true in order for content to match, meaning all rules are connected by AND. For example, if a recommendation had one rule stating the event city is equal to Portland and the event state is equal to Oregon, you would see events happening only in Portland, Oregon but not also in Portland, Maine.

   If you select **Any**, then at least one rule must be met for content to be valid, meaning each rule is connected by OR. For example, if a recommendation had one rule stating the event city is equal to New York and another rule stating the event city is equal to Boston, you would see events happening in New York as well as in Boston.
7. When you’re done adding rules, click **Save**.
8. When you're done editing the recommendation, click **Done**.

All audience rules of a recommendation are listed on the rules tab of the recommendation details.

Group Audience Rules

By grouping audience rules you can create complex expressions to return detailed results. This allows you to more exactly and accurately describe the content that should be shown to audience members. Also note that you can use the AND and ALL group operators to determine how multiple rules and sub-groups will interact to select your content.

For example, to select content related to an event, you may want to see events of 200 people or more that are near you within a certain price range. As it may be more expensive for you to travel to Boston than it is to travel to New York, the events in New York could have a higher ticket price than the events in Boston. Your rule would look like this:

Exhibitors >= 200 **AND** ((City = New York **AND** Price < $1000) **OR** (City = Boston **AND** Price <= $500))

1. On the Rules tab, select **All rules**.
2. Drag **Number of exhibitors** to the rules area, select **Greater than or equal to** and enter 200.
3. Click **Add Group** to create a new grouping of rules and select **Any rules**.
4. Click **Add Group** again to create a new child group within the group made in the previous step, and select **All rules**.
5. Drag **Event City** into the rule group, select **Equal to** and enter New York.
6. Drag **Ticket price** into the same rule group, select **Less than** and set it to 1000.
7. Click **Add Group** again to create a new sibling group at the level of the group made in step 4, and select **All rules**.
8. Drag **Event City** into the rule group, select **Equal to** and enter Boston.
9. Drag **Ticket price** into the same rule group, select **Less than or equal to** and set it to 500.

The rule set will return events of at least 200 exhibitors in New York with a ticket price less than $1000 as well as those in Boston with a ticket price of less than $500.

Test Recommendations

Testing a recommendation allows you to apply values for the audience attributes and test to see what recommendations are made. Until values are applied, fallback assets are displayed.

1. On the **Test** tab of a recommendation, select the asset status. Select **Management** to see what assets are available in a repository that satisfy the rules of the recommendation. Select **Published** and a channel to verify what published content items will be displayed.
2. Enter values in the audience attribute fields and click **Apply**. You can enter a list of values if the rule uses an operator compatible with list values, such as Equal to, Not equal to, or Best match. Items in a list of values must be separated by a new line, for example:

   ```
   basketball
   baseball
   soccer
   ```

   > **Note:**
   >
   > The values you enter will persist in your browser's local storage and be used the next time you test the recommendation.

   By default the test will run using the current system date to process any date functions used in the audience rules, such as **Start of Month** or **End of Month**. If you want to test the recommendation as if it were a different date, select a date to simulate using the **Current date (System)** field.

3. When you're finished testing, click **Done**.

Create and Manage Test Profiles

A test profile is a collection of audience attributes that can be used to facilitate testing recommendations using different attribute values that represent a site visitor. To create a test profile:

1. After your have created your recommendation and defined your rule set, enter attribute values in the **Audience Attributes** section of the **Test** tab and click **Create Profile**.
2. Enter a name and optional description for the new profile. The audience attributes and values you entered in the **Test** tab are captured in the current profile.
3. Click **Add** to add additional audience attributes and values if necessary, for example if you plan to use this profile to test other recommendations using those additional audience attributes.
4. When finished, click **Create**.

> **Note:**
>
> Test profiles will persist in your browser's local storage and be used the next time you test the recommendation.

New profiles are added to the test profile menu. Select a profile from the list to test recommendations using different profiles having different attribute values. The test profile menu is also available when building a site for use when testing a recommendation placed on a page.

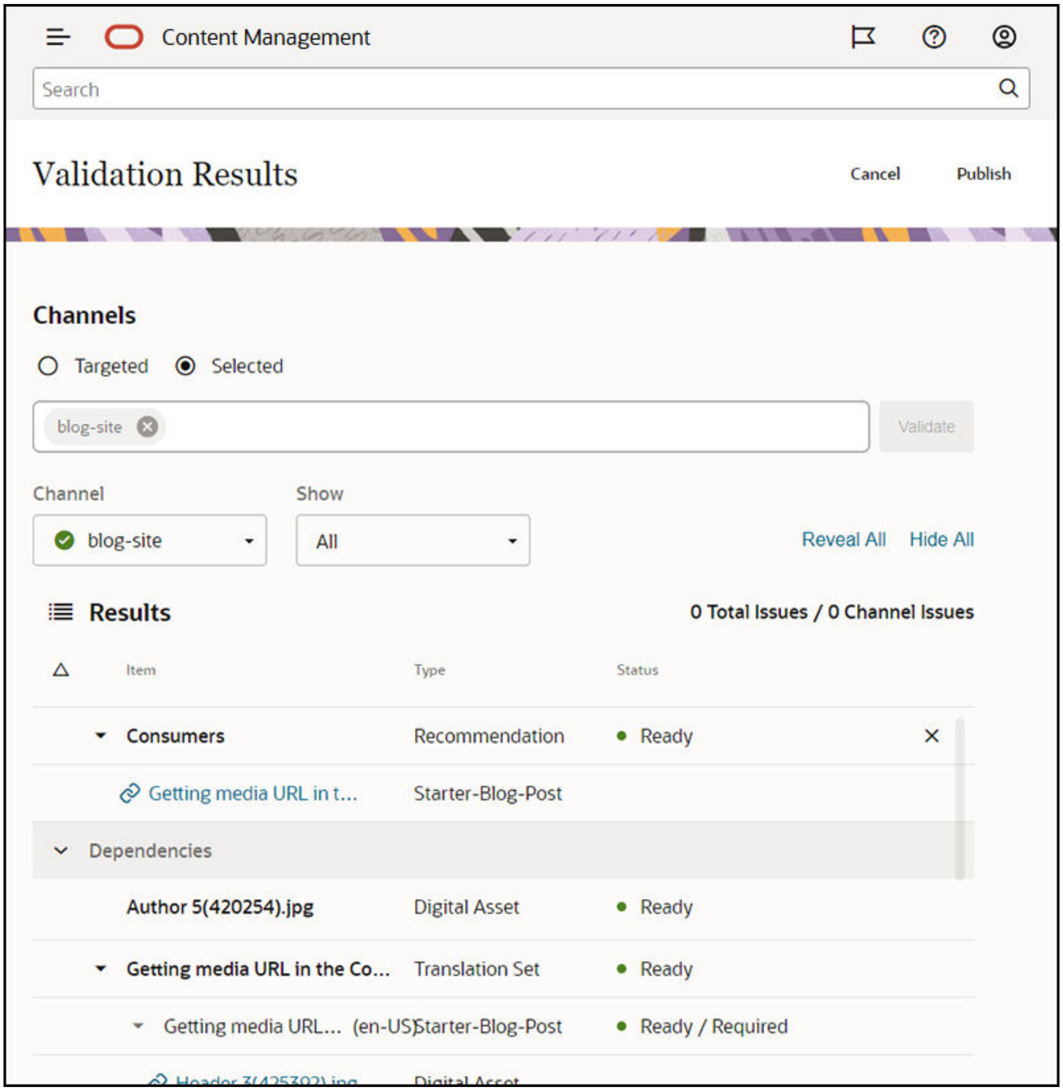
You can only use test profiles when building sites. To duplicate, edit, and delete test profiles, you must edit the recommendation in Oracle Content Management.

1. Click **Recommendations** in the side navigation menu of Oracle Content Management.
2. Select the recommendation you want to edit and click **Edit** in the menu bar.
3. Click **Test** to open the Test tab.
4. Click **Manage** above the test profile menu on the Test tab. You can duplicate, edit, and delete test profiles.

Publish a Recommendation

After successfully creating and testing the recommendation, publish it to your targeted channel.

1. Click **Recommendations** in the side menu.
2. Select the recommendation and click **Publish**. The validation results are displayed.

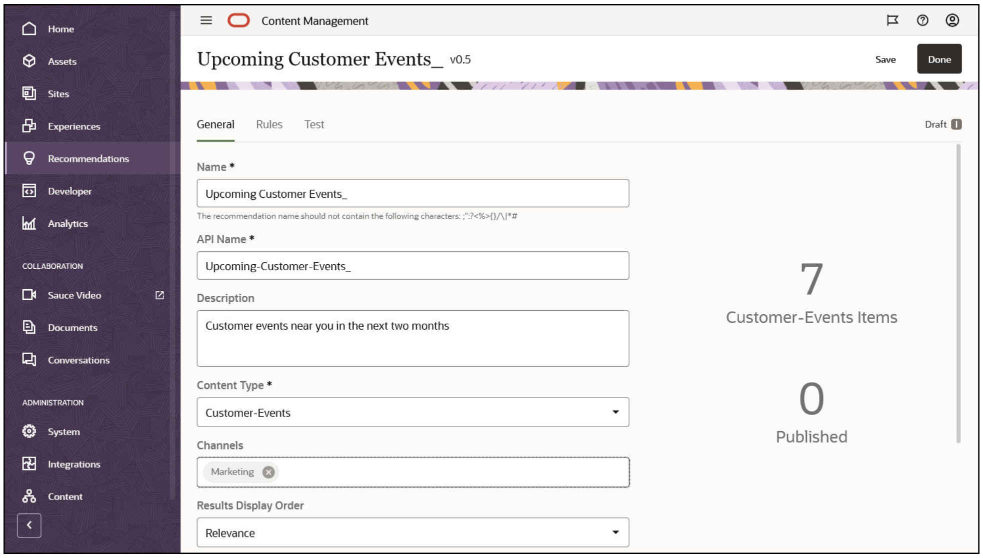


3. Confirm the validated results are accurate, including targeted channel and recommendation status. You can also see a list of all item dependencies. For recommendations, only specified fallback assets are considered dependencies.
4. After confirming the recommendation status and dependencies are ready, click **Publish**.

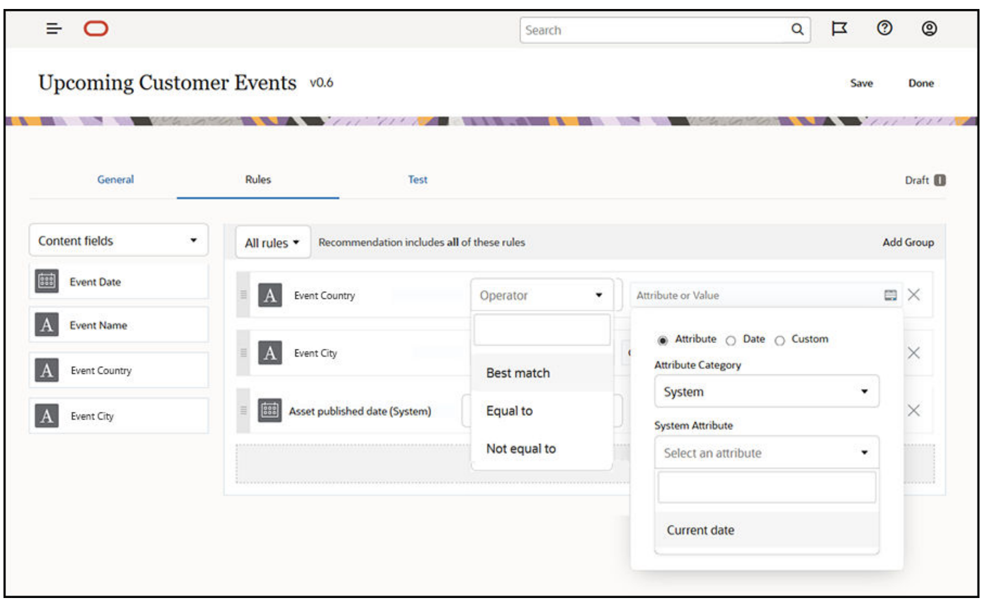
Example Recommendation

Let's create a recommendation that lists events near a site visitor, publish it to a targeted channel and place it on a page. For this example, let's assume that a site administrator has already created a content type called Customer-Events and a publishing channel called Customer-Events that publishes to a Customer Events site.

1. Click **Recommendations** in the side menu and select a repository to use.
2. Click **Create**.
3. Enter a name for the recommendation, such as **Upcoming Customer Events**. The required API Name is generated automatically.



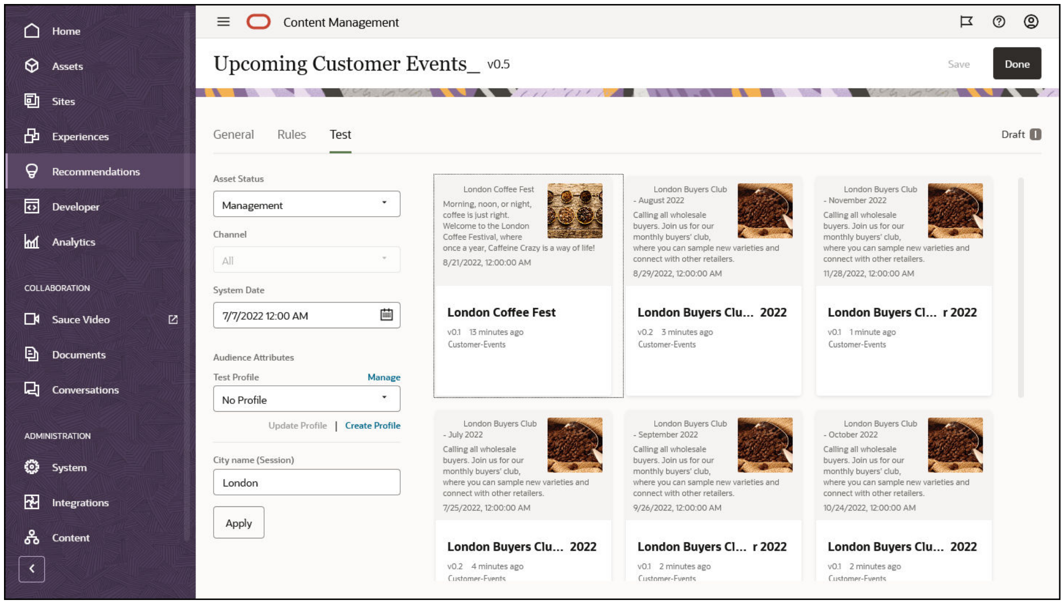
4. Enter an optional description.
5. Select the **Customer-Events** content type.
6. Choose the **Customer-Events** channel where the recommendation will be published.
7. Select fallback assets to use if no content matches the criteria defined in the audience rules.
8. Click **Save**. The Rules tab is displayed.



9. Select the content field **Event Country**, drag it into the rule area, set it equal to audience attribute **Country name**.
10. Select the content field **Event City**, set it equal to audience attribute **City name**.

11. To test the recommendation, click **Test**, enter **UK** as the audience attribute country name and **London** as the city name and click **Apply**. The fallback assets are replaced with content items from the repository matching the audience attributes.

12. Click **Done**.



13. Once successfully tested, publish the recommendation.

Part III

Manage Business Assets

Business assets are back-office assets used to manage and run a business. They can be business documents (such as invoices, contracts, engineering drawings, or reports) that are needed for different reasons (reference, retention, record keeping), as well as content items (structured content such as employee records or supplier information).

> **Note:**
>
> If you manage digital assets (such as images, videos, and files) that are needed to be published for use within digital experiences (websites and other channels) or translated into multiple languages, you should instead use *digital assets*.

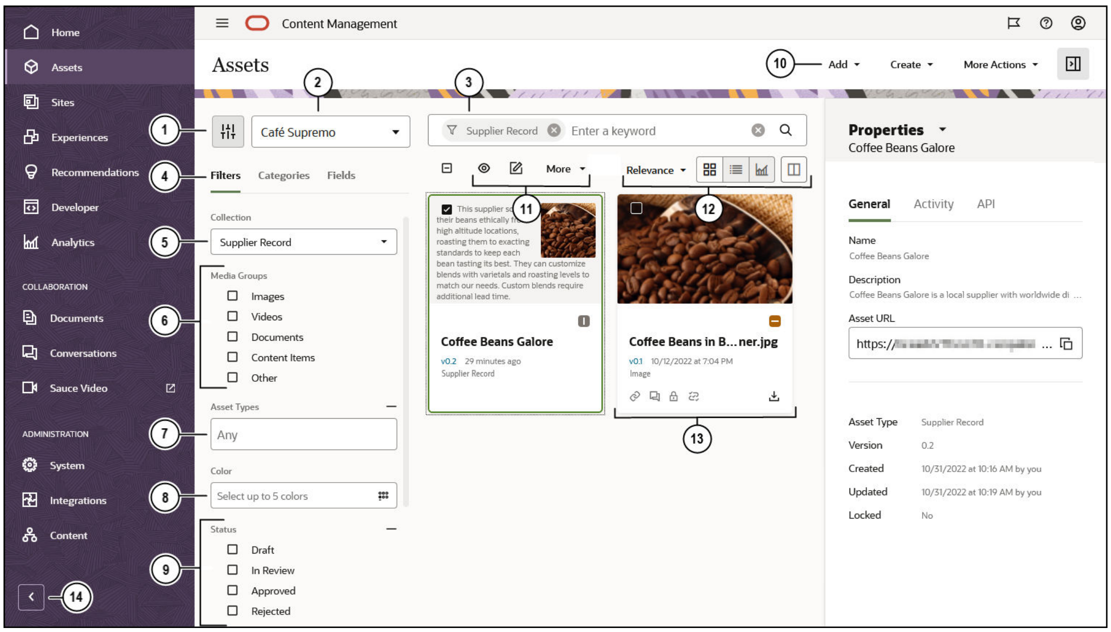
You can perform the following tasks to manage business assets:

- Get to Know the Business Assets Page
- Create and Edit Business Documents
- Create and Edit Structured Business Content
- View Business Assets and Their Data
- Organize Business Assets
- Review Business Assets
- Manage Business Assets

> **Note:**
>
> Business asset repositories aren't supported in Oracle Content Management Starter Edition. To take advantage of the full feature set, upgrade to the Premium Edition.

15 Get to Know the Business Assets Page

Your Assets view is where you manage all the business documents and content items. The features available on the Assets page differ depending on whether you are viewing a *business asset repository* or a *digital asset repository*. Digital asset repositories support publishing and translation. This topic describes the Assets page for a business asset repository.



To get started, click **Assets** in the left navigation menu.

Callout	Description
1	Click  to hide or show the filter panel. Hiding the panel gives you more room for viewing assets in the content area.
2	Select the repository to use from the drop-down list next to the filter icon.
3	Search for assets using tags or keywords. If smart content is enabled on the repository, after you enter a search term, you'll see recommended keywords under the search box. Click a keyword to add it to your search.
4	By default, you see filters for filtering the assets in the repository by collection, media group, asset type, and status. You might see additional filter tabs: • **Categories**—If a taxonomy is associated with the selected repository, you can filter by categories on the Categories tab. Taxonomies provide a hierarchical, folder-like structure of categories. • **Fields**—You can search for standard property values (for example, created by or description) or attribute values from custom asset types on the Fields tab.
5	Filter by collection. If you choose a specific collection, you will see only those content items and business documents that are in that collection. If you leave this option set to All, you'll see all the assets in the repository you chose to use.
6	Filter by media group, for example, images, documents, or content items.

Callout	Description
7	Filter by the type of asset. You see all the asset types available in the selected repository.
8	Filter by color. If smart content is enabled on the repository, you can filter images by color, selecting up to five colors.
9	Filter by status. You can filter by the following status types: approval, workflow, lock, or collection.
10	The menu at the top of the page lists the actions you can take in the *repository*: • **Add**: You can add files into the repository from your computer or files that are already stored in your Documents cloud account or, if your administrator has enabled cloud storage integration, from a third-party cloud storage provider. • **Create**: You can also create a content item by clicking **Create** and then selecting a content type to use from the list. • **More Actions**: Click **More Actions** to see additional views of the repository: Collections, Archive Assets, and Workflow Tasks (if workflows are associated with the asset repository you're viewing). • : The sidebar panel is described below as it shows asset-specific information after selecting an asset. To view the sidebar panel, which includes categories, tags and collections, properties, and workflows, click .

Callout	Description
11	After you select at least one asset, the actions bar above the assets shows the actions you can take on the *selected assets*. Depending on what you select, different actions will be available. If you don't see all the actions, click **More**. • (**View**)—View the selected asset. • (**Edit**)—Edit the selected asset. For image or Video Plus assets, you can edit the media or the attributes. For video assets, you can also view subtitles. • (**Upload New Version**)—Upload a new version of the selected business document. • (**Download**)—Download a selected asset and store it for use on your local computer. • (**Copy**)—Copy the selected content items. • (**Copy To**)—Copy the selected assets to another repository. • (**Check for Updates**)—Check if the business document has updates in the linked Documents file. • **Lock**/**Unlock**—Lock or unlock the selected assets and, optionally, their dependents. • **Workflow**—You can review assets with basic out-of-the-box approve/reject workflow, or, if configured, you might be able to take advantage of workflow from Oracle Integration. • **Find**—Find visually similar assets to selected digital assets, or find assets categorized similarly to selected assets. • **Convert**—Convert a business document from an out-of-the-box digital asset type (Image, Video, or File) to a custom digital asset type. • **Sidebar** or —Open the sidebar to view additional information about the selected assets: – Categories – Conversation – Inventory – Properties (including activity and previous versions) – Tags and Collections – Workflows • (**Archive**)—Archive the selected assets. • (**Delete**)—Delete the selected assets.
12	You can sort the assets in your view by relevance, name, or by the last date they were updated. You can also toggle between grid view ( ) and table view ( ). In table view, you can select which columns you'd like to see by clicking .

Callout	Description

13	Each asset tile shows details about the asset. You see the following information:
	• A preview of the asset.
	• The asset status:
	  – Approved
	  – Rejected
	  – Draft
	  – Not ready for use (asset includes required fields that haven't been completed)
	  – In Review
	• The asset name. Click the name to view the asset.
	• The asset version. Click the version to see the asset's activity history.
	• The asset type associated with the asset.
	• If a business document has been added from Documents, you see .
	• If the asset has an associated conversation, you see . Click the icon to view the conversation.
	• If the asset is locked, you see .
	• If the asset is in workflow, you see .
	• An icon to download the business document (, not shown for content items).

14	Click the arrow to expand navigation to show text for the menu options in the navigation menu or collapse it to show an icon-only navigation menu. Collapsing the menu gives you more room for viewing assets in the content area.

16
Create and Edit Business Documents

As a business document user, you can:

- Understand Business Documents
- Create Business Documents
- Work with Business Documents on the Assets Page
- Perform Actions While Viewing a Business Document
- Edit Business Documents
- Revoke Access to a Third-Party Cloud Storage Provider
- Create and Edit Desygner Business Documents

Create Business Documents

To add business documents:

1. Add items in one of the following ways:
   - **Add items from the Assets page.**
     On the **Assets** page, select the repository and, optionally, the collection you want to add the items to. Then click **Add** and select an option:
     – **Add from Documents**—Select one or more items from your Oracle Content Management Documents.
       A copy of the item will be made and added to the repository as a new asset and so is listed as version one in the repository, regardless of the version number in Documents. For example, if you select v3 of a document and add it as an asset, it will be listed as v0.1 when viewing the asset in the repository. The asset will include on the asset tile, signifying that the asset is linking to a Documents file. If you change the Documents file, it won't automatically affect the asset. However, you can check the asset for updates and update the asset to the newest version of the Documents file at any time. If you permanently delete the Documents file, the asset remains in place, no longer linked to the Documents file.
     – **Add from this computer**—Select one or more items from your computer.
     – **Add from a third-party cloud storage provider**—If your administrator has integrated other third-party cloud storage providers, and your repository administrator has added the connector to the selected repository, you'll see options to import from those providers. The first time you import from a new provider, you'll need to sign in. Then you'll be able to select one or more items from your account.
       If necessary, you can later revoke access to a provider.
   - **Drag and drop content from your desktop computer.**

On the **Assets** page, make sure you've selected the repository and, optionally, the collection you want to add the items to. Then find content from your local files and drag it into the **Assets** page.

- **Choose content from your Documents list.**
  On the **Documents** page, select items, and choose **Add to Assets**. Select the repository you want to add the items to. You must be a member of a repository to add an item to it. If you want to use a repository but don’t see it in the list, you may not be a member of that repository.

  A copy of the item will be made and added to the repository as a new asset and so is listed as version one in the repository, regardless of the version number in Documents. For example, if you select v3 of a document and add it as an asset, it will be listed as v0.1 when viewing the asset in the repository. You can change or delete the original item in Documents and not affect the one that’s stored in the repository.

2. In the Add to Repository dialog, you'll see a list of the items you're adding, including the file name, file size, the associated asset type that will be applied to the item, the status, and, if there are data fields in the selected asset type, you'll see an attributes icon ( ). You might need or want to perform the following actions in the dialog before you add the assets:

   - **Select an asset type**—If the file type has more than one associated digital asset type, you can select the appropriate type in the drop-down list; or select multiple items, click **Assign Type**, and select the asset type. If the asset doesn't have any associated asset types available in the selected repository, you'll see "No Types" as the status. You'll need to remove the item before you can add any remaining items.
   - **Edit attribute values**—If the asset is missing some required attribute values, you'll see "Attributes" as the status. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review or publish the asset.
     You might also want to view or edit the attribute values, including the name, description, or language settings, as discussed below.

     – **Edit attributes**—To edit the values, click or select the item and click **Edit Attributes**.

     – **Edit attribute values for multiple assets**—To enter the same attribute value for multiple assets of the same asset type, select the assets, then click **Edit Attributes** (the attributes icon shows the attributes for only a single asset).

     – **Edit the name**—Digital asset file names must include the file extension, so if you remove the extension while editing the name attribute, the extension will be appended to the name you entered when you save the changes. For example, if you upload a file named "rose.jpg" or "flower.jpg" and change the name attribute to "rose", the asset will be named "rose.jpg" (using the name you entered with the file extension appended to it).
     If you accidentally enter an incorrect extension while editing the name attribute, the correct extension will be appended after the incorrect extension you entered. For example, if you upload a file named

"flower.jpg" and change the name attribute to "rose.png", the asset will be named "rose.png.jpg" (using the name and incorrect extension you entered with the correct extension appended to it).

– **Edit the description**—You can optionally enter a description for the asset.
– **Add media**—If the attributes include a media reference, you can perform the following actions:
  * To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  * To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
  * To clear the media item, click .
– **Add a referenced content item**—If the attributes include a content item reference, you can perform the following actions:
  * To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  * To select an existing content item, click and navigate to the desired content item.
  * To clear the content item, click .

- **Assign categories**—If a taxonomy is associated with the repository you're adding the items to, you can assign categories. Select one or more items, and then click **Categories**, or click , then, in the drop-down menu, select **Categories**. To assign categories to this content item, click **Add Category**.
- **Assign tags**—Add keywords that let users find the item quickly. Select one or more items, and then click **Tags and Collections**, or click , then, in the drop-down menu, select **Tags and Collections**. Add the tags for the assets. Press **Enter** after each tag. You can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.

- **Add to collections**—Add the items to a collection within a repository. Select one or more items, and then click **Tags and Collections**, or click , then, in the drop-down menu, select **Tags and Collections**.

Work with Business Documents on the Assets Page

You can view, edit, and manage your business documents in many ways on the Assets page.

When you right-click or select a business document you can perform the following actions. Depending on the size of the window, you might need to click **More** to see some of the options.

Task	Description
View the asset	To view the asset in a slide-out panel without leaving the Assets page, click the asset name, choose **View** in the right-click menu, or click in the actions bar. To view the asset in a new tab, press Ctrl and click the asset name. When the asset is open you can also see how the content will look with the different layouts associated with the asset type, and access the editor.
Edit the asset	To edit the media file, choose **Edit Media** from the right-click menu or the menu. To edit the attributes, including the name or description, choose **Edit Attributes** from the right-click menu or the menu.
Upload a new version	To add a new version of the asset, choose **Upload New Version** in the right-click menu or click in the actions bar. If you upload a file with a different name or extension, the new version will keep the original name and update the extension as appropriate. For example, if you're uploading a new version for a file named "contacts.txt", and the file you upload is named "contact_info.csv", the new version will be named "contacts.csv" (keeping the original name of "contacts", but updating the extension appropriately to ".csv").
Download assets	To download a digital asset to your computer, choose **Download** in the right-click menu or click in the actions bar or on the asset tile. You can download only business documents, not content items.
Copy the asset	To copy the asset to another repository, choose **Copy To** in the right-click menu or click in the actions bar, select the repository you want to copy the asset to, then click **Copy**. You must have the Manager role on the target repository. You can select more than one asset to copy at the same time. Only the current version of each asset will be copied. Repository managers can also copy assets from one repository collection to another.

Task	Description
Check for linked file updates	If the asset was added from Documents, you can check if there are updates to the linked Documents file and update the asset to the latest version of the Documents file. Choose **Check for Updates** in the right-click menu or click in the actions bar. If the linked file has been updated in Documents, click **Update** to update the asset with the changes. To preview the current version of the asset or the updated version from Documents, click next to the version you want to preview. To exclude a file from being updated, click next to the file.
Lock or unlock the asset	To lock the asset so other users can't edit it, choose **Lock Assets** from the right-click menu or the **Lock** menu. If the asset has already been locked by you, you can unlock the asset by clicking **Unlock Assets**.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Choose **Submit for Review** from the right-click menu or the **Workflow** menu. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. You can select more than one asset to submit for review at the same time. • Workflow: Choose **Workflows** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click) to move the asset through workflow. The submission status is shown below the asset preview: • Draft • In Review • Approved • Rejected
Find similarly categorized assets	If the asset has been categorized, find assets that are assigned to similar categories as the selected asset, by choosing **Find Categorized Similarly** in the right-click menu or the **Find** menu.
Convert assets to a custom asset type	If you have assets that use an out-of-the-box digital asset type (Image, Video, or File), you can convert them to a custom digital asset type. Choose **Convert Type** in the right-click menu or the **Convert** menu.
Assign categories to the asset	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by choosing **Categories** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
Assign tags and collections	To assign tags and collections to the asset, choose **Tags and Collections** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click).
View the asset's properties	To view the asset's properties, choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). The properties include read-only information such as when the item was created and last updated.

Task	Description
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile; or choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click); and then click the **Activity** tab.
Archive the asset	If the asset isn't used anymore, but you're not ready to permanently delete the asset, you can archive it. To archive the asset from the repository, choose **Archive** in the right-click menu or click in the actions bar. To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.
Remove the asset	To remove the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar. You can select more than one asset to delete at the same time.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset, click , then, in the drop-down menu, select **Inventory**.

Preview a Business Document

To preview the asset in a slide-out panel without leaving the Assets page, choose **Preview** in the right-click menu or click in the actions bar or on the asset tile.

While previewing the asset, you can perform the following actions:

- To download a digital asset to your computer, click **Download**.
- To view the asset in full screen mode, click **Full Screen**.
- To change the magnification of a digital asset, click **More Actions**, then select a zoom option; or use the zoom controls.
- To close the asset, click **Close**.
- If a digital asset has a layout associated with the underlying digital asset type, you can view the asset in those layouts by clicking **Preview in Layout**. You see the digital asset in the default layout for the asset type.
  - If there are other layouts or site pages configured for the associated asset type, you can preview them by selecting a layout or site page from the drop-down list.
  - By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking .
  - To show the ruler and manually change the device size, click , then move the handles to change the height and width.

Perform Actions While Viewing a Business Document

While viewing an business document, you can perform the following actions.

Task	Description
Preview the asset in layouts	If the asset has a layout associated with the underlying asset type, you can view the asset in those layouts by clicking **Preview in Layout**. By default you see the asset in the content form view—the field names and values from the asset type. • If there are other layouts configured for the associated asset type, you can preview them by selecting a layout from the drop-down list. • By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking . • To show the ruler and manually change the device size, click , then move the handles to change the height and width.
Change the magnification of the asset	To change the magnification of the asset, move your cursor to the bottom of the window and the zoom controls appear.  • —Click to view the asset at its actual size. • —Click to view the asset at the width of the viewing pane. • —Click to view the entire image, video, or page. • —Click to view the asset full-screen. Click again or press Esc to exit full-screen. • —Click to zoom out. • —Slide to view the asset at the desired magnification. • —Click to zoom in.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Click **Submit for Review**. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. • Workflow: click , then, in the drop-down menu, select **Workflows** to move the asset through workflow.
Download the asset	To download the asset to your computer, click **Download**.

Task	Description
Upload a new version of the asset	To add a new version of the asset, click **More Actions**, then select **Upload New Version**. If you upload a file with a different name or extension, the new version will keep the original name and update the extension as appropriate. For example, if you're uploading a new version for a file named "contacts.txt", and the file you upload is named "contact_info.csv", the new version will be named "contacts.csv" (keeping the original name of "contacts", but updating the extension appropriately to ".csv").
Add annotations to the asset	To add an annotation to the asset, click , select an area or click where you want to add the annotation, then enter your comment in the text box, and click **Post**.
View annotations on the asset	To view annotations on the asset, click . When you click an annotation on the asset, the annotation note will get focus in the conversation.
Close the asset	To close the asset, click **Close**.
View the asset's properties	To view the asset's properties, click , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile or click **Properties**, and then click the **Activity** tab.
View the asset's attributes	To view and edit the attributes for the asset, click , then, in the drop-down menu, select **Attributes**.
View the asset's categories	If a taxonomy is associated with the repository the asset is stored in, you can view and manage the categories assigned to the asset by clicking , then, in the drop-down menu, selecting **Categories**.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset, click , then, in the drop-down menu, select **Inventory**.
View the tags and collections assigned to the asset	To view and manage the tags and collections associated with the asset, click , then, in the drop-down menu, select **Tags and Collections**. Add or remove tags and collections as necessary.

Edit Business Documents

You can edit your digital assets in several ways:

- Edit Business Document Attributes
- Assign Categories to Business Assets
- Tag Business Assets
- Refresh Business Documents Added from Documents
- Convert a Business Document to a Custom Asset Type
- Revert to a Previous Version

Edit Business Document Attributes

Business document attributes include the name and description and any custom attributes defined in the asset type by your content administrator.

To view the asset's attributes, open the asset, click , then, in the drop-down menu, choose **Attributes**.

To edit the attribute values, including the name or description, click **Edit**.

- **Edit the name**—Business document file names must include the file extension, so if you remove the extension while editing the name attribute, the extension will be appended to the name you entered when you save the changes. For example, if you upload a file named "contacts.csv" or "contact_info.csv" and change the name attribute to "contacts", the asset will be named "contacts.csv" (using the name you entered with the file extension appended to it).
  If you accidentally enter an incorrect extension while editing the name attribute, the correct extension will be appended after the incorrect extension you entered. For example, if you upload a file named "contact_info.txt" and change the name attribute to "contacts.csv", the asset will be named "contacts.csv.txt" (using the name and incorrect extension you entered with the correct extension appended to it).
- **Edit the description**—You can optionally enter a description for the asset.
- **Add or edit media**—If the attributes include a media reference, you can perform the following actions:
  - To edit the media or media attributes, click , and choose an option.
  - To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  - To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
  - To clear the media item, click .
- **Add or edit a referenced content item**—If the attributes include a content item reference, you can perform the following actions:
  - To edit the content item, click .

  - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  - To select an existing content item, click and navigate to the desired content item.
  - To clear the content item, click .
- When you're done, click **Save**.

Refresh Business Documents Added from Documents

For an asset that was added from Documents, you can check if the linked Documents file has been updated, and then refresh the asset to the latest version.

To check for updates and refresh assets to the latest versions of the Documents files:

1. Select one or more linked assets.
   You can quickly find all linked assets by selecting **Linked** in the Filters panel.

   To check for updates for a localized version of an asset, select the language in the drop-down list on the asset tile and select the asset.
2. Choose **Check for Updates** in the right-click menu or click in the actions bar.
   For assets that can be updated, you see the following information:
   - The asset name and language. To preview the asset, click .
   - The current state of the asset. For example, you'll see what version of the document the asset was created from or that the asset itself has been edited. If the asset has been edited, updating the asset will get rid of the asset updates and replace the asset with the current version of the linked Documents file.
   - The current Documents file and version. To preview the document, click .
   - An icon ( ) to exclude the file from being updated.

   For assets that can't be updated, you see the following information:
   - The asset name and language.
   - The reason the asset won't be updated. There are several reasons an asset might not be updated:
     - The asset is already in sync with the linked Documents file.
     - The asset is locked.
     - You don't have update permission for the asset's associated asset type.
     - You don't have at least Viewer permission for the linked Documents file.
     - The updated media file in Documents isn't supported by the asset's associated asset type.
3. When you're done reviewing the updates, click **Update** to refresh the assets to the latest versions of the Documents files.

Convert a Business Document to a Custom Asset Type

You can convert a business document from an out-of-the-box asset type (Image, Video, or File) to a custom asset type.

1. Click **Assets** in the side menu to open the assets page.
2. Select or right-click the assets you want to convert, then, in the **Convert** menu, choose **Convert Type**.
3. In the Convert Asset Type dialog, you'll see a list of the items you're converting, including the file name, the current source asset type, the target asset type that will be applied to the item, the status, and, if there are data fields in the selected asset type, you'll see an attributes icon ( ). You might need or want to perform the following actions in the dialog before you convert the assets:
   - **Select a new asset type**—If the file type has more than one custom asset type that it can be converted to, you can select the new type in the drop-down list; or select multiple items, click **Assign Type**, and select the asset type. If the asset doesn't have any associated asset types available to convert to in the selected repository, you'll see "No Types" as the status. You'll need to remove the item before you can convert any remaining items.
   - **Edit attribute values**—If the asset is missing some required attribute values, you'll see "Attributes" as the status. You might also want to view or edit the values. To edit the values, click or select the item and click **Edit Attributes**. To enter the same attribute value for multiple assets of the same asset type, select the assets, then click **Edit Attributes** (the attributes icon shows the attributes for only a single asset).

Revoke Access to a Third-Party Cloud Storage Provider

If your administrator integrated other third-party cloud storage providers, and you signed into your account to add assets from the provider, there might come a time when you want to revoke access to the provider.

To revoke access to a third-party cloud storage provider:

1. On the **Assets** page, click **Add**, and then select **Manage Sources**.
2. In the list of all your saved source access, click **Revoke** next to the provider you want to disconnect from.

Create and Edit Desygner Business Documents

To work with Desygner assets and templates, you need the Enterprise User role (to access the Assets page) and access to an asset repository that has been integrated with Desygner. You can perform the following tasks with Desygner assets and templates:

- Import a Desygner template.
- Edit the template.
- Create Desygner business documents (PDFs based on Desygner templates).

- Edit the documents.

Import a Desygner Business Template

To import Desygner template:

1. Click **Assets** in the navigation panel in your browser, and make sure you're viewing an asset repository that has been integrated with Desygner.
2. Click **Add** and then select **Import Template from Desygner**.
3. If this is your first time importing a Desygner template, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
4. Open the appropriate campaign folder, select the Desygner template you want to use to import, and then click **OK**.
5. In the Add to Repository dialog, click **Done** to import the template.

You can now edit the template.

Edit a Desygner Business Template

To edit a Desygner template:

1. On the Assets page, select the template and choose **Edit in Desygner** from the right-click menu or the menu.
2. If this is your first time editing a template in Desygner, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
3. Edit the template in Desygner.
4. When you're done with your changes, click **Save**.
5. To close the Desygner editor and return to the Oracle Content Management Assets page, click **Done**.

Create Desygner Business Documents

To create Desygner assets:

1. Click **Assets** in the navigation panel in your browser, and make sure you're viewing an asset repository that has been integrated with Desygner.
2. Click **Create** and then select **Create Desygner Asset**.
3. If this is your first time creating a Desygner asset, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
4. Open the appropriate campaign folder, and select the Desygner template you want to use to create an asset.
5. In the Add to Repository dialog, click **Done** to create an asset from the selected template.

You can now edit the document.

Edit a Desygner Business Document

To edit a Desygner asset:

1. On the Assets page, select the asset and choose **Edit in Desygner** from the right-click menu or the  menu.
2. If this is your first time editing an asset in Desygner, you'll be asked to sign in. If you use SSO, click **Sign In via SSO**. Enter your user name and password for your Desygner account, and then click **Sign In**.
3. Edit the asset in Desygner.
4. When you're done with your changes, click **Save**.
5. To close the Desygner editor and return to the Oracle Content Management Assets page, click **Done**.

17 Create and Edit Structured Business Content

As a structured business content user, you can:

Understand Structured Business Content

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

Overview of Structured Content

A *content type* is a framework for information. You can think of a content type like a form, where information is entered and saved. The content type is used to create a *content item*. Content items are essentially individual instances of the completed content type "form".

A content type might require text, a date, an image, or a variety of numerical fields. It all depends on what's needed. Because each piece of information is in a separate field, possibly even a separate referenced asset, you can reuse pieces of the content by referencing them in other assets.

For example, perhaps there's a content type called Employee Information. It might have fields for a job title, geographical location, a brief biography, and a picture. When you use that content type to create a content item, you enter specific information: job title, location, contact information, and upload a photo as a separate digital asset that's referenced in the content item. The location and contact information may be omitted in one place or included in another, and the employee photo may be just a small avatar or a larger image next to the employee's bio. The content itself won't change, but the layout and which pieces are displayed can change without affecting the actual content that you entered.

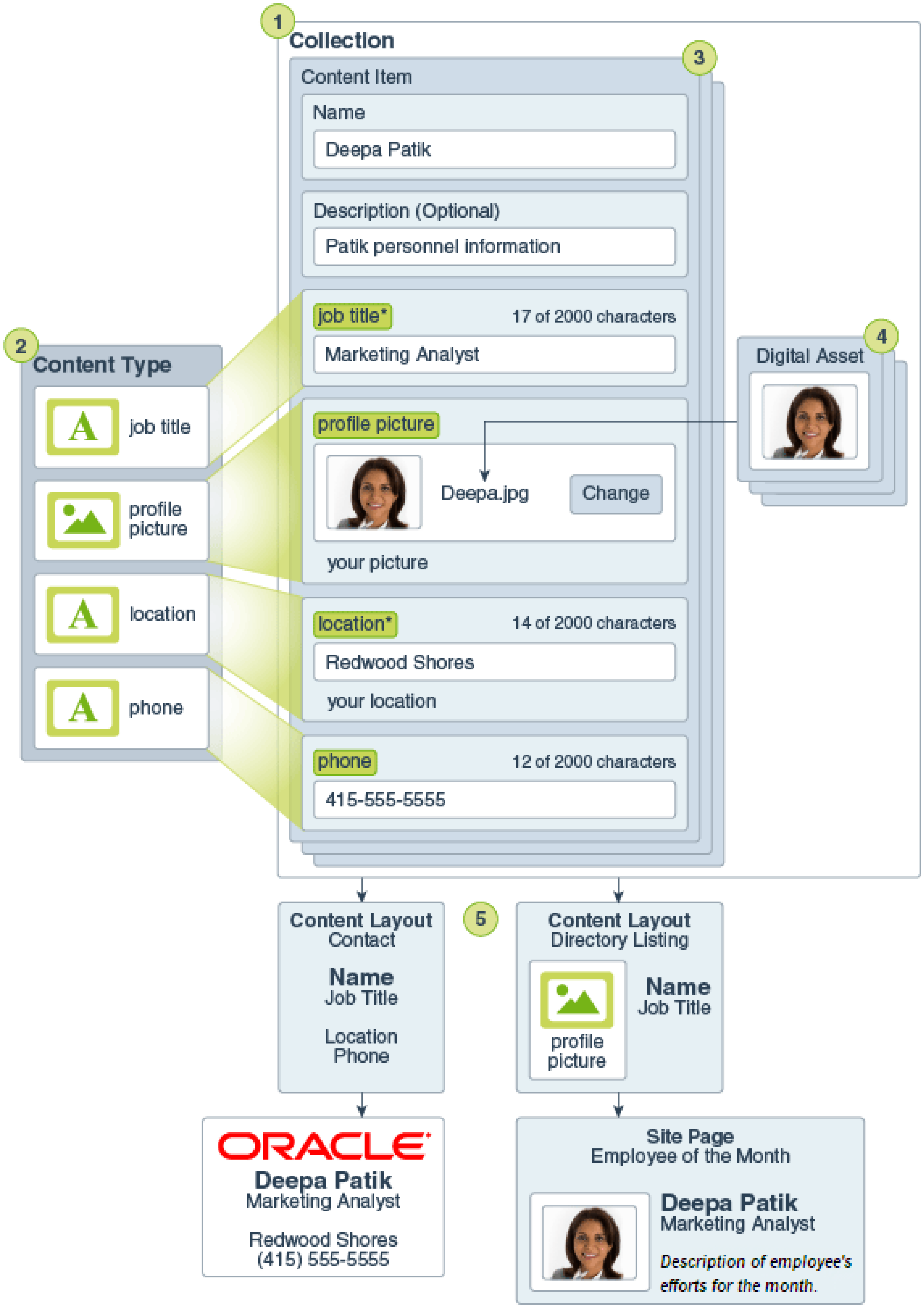
A content type is created by a user with the content administrator role, and then has to be associated with a repository. Enterprise users with at least the contributor role to the repository can then use the content type to create a new content item. Depending on your role in the organization, you may not actually put structured content to use. You may just create content items or add business documents that are needed. See Learn About User Roles for details about roles and responsibilities.

Use Structured Content

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

- Layouts for content types are designed and deployed. This is usually handled by an IT designer with content administrator privileges.
- **Collections (1)** are created to manage subsets of assets in a repository. Users can create collections to manage their business documents and content items for a particular project or other need.
- A person with a content administrator role designs the **content types (2)**.

- The content administrator must share the collection and associate the content types with a repository, then users with at least the contributor role on the repository can upload assets and create **content items (3)**.
- Contributors add the content items and upload the **business documents (4)** for the project. When a content item is created, the creator can assign it to the appropriate collection.
- A content type can have different **content layouts (5)** associated with it, letting you display the content in different ways.
- The IT designer adds the business documents and content items to the project.


1
Collection
3
Content Item
Name
Deepa Patik
Description (Optional)
Patik personnel information
job title*
17 of 2000 characters
Marketing Analyst
profile picture
Deepa.jpg
Change
your picture
location*
14 of 2000 characters
Redwood Shores
your location
phone
12 of 2000 characters
415-555-5555
2
Content Type
job title
profile picture
location
phone
4
Digital Asset
Content Layout
Contact
Name
Job Title
Location
Phone
5
Content Layout
Directory Listing
profile picture
Name
Job Title
ORACLE
Deepa Patik
Marketing Analyst
Redwood Shores
(415) 555-5555
Site Page
Employee of the Month
Deepa Patik
Marketing Analyst
Description of employee's efforts for the month.

Example

Remember that a content item is created using a content type as a guide. Most content types are tailored to fit a particular need in a project.

When you create a content item, you can edit it later and not affect anything where the content item is used. For example, perhaps you need to keep notes on any contact you have with your customers. You or your administrator create a content type called *Customer Updates*. The content type has fields for short text, a date, and a small paragraph.

You create a *Great Escapes Updates February 2022* content item for your customer Great Escapes, using the *Customer Updates* content type and you add it to your *Great Escapes* collection. Then you add the *Great Escapes Updates February 2022* content item as a reference in your *Great Escapes* customer profile.

Then you can edit *Great Escapes Updates February 2022* throughout the month and be reflected in the customer profile without having to touch the profile itself.

Create Business Content Items

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

To create a content item:

1. Click **Assets** in the navigation panel in your browser.
2. Click **Create** and then select **Create new content item**. If you’ve created content items before, the last five types you used are shown. Otherwise, select the content type you want to use from those shown.

   > **Note:**
   >
   > If you don’t see a content type you expect to see, contact the your content administrator.

3. Enter a name and an optional description for the content item. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review or publish the asset.
4. By default, the repository's default language is selected. If this asset is in another language, select it. The available languages are set in the repository.
5. Enter information into the necessary content item data fields. The fields might be grouped together and certain groups might be collapsed by default. Expand the collapsed groups to view the additional fields.

   > **Note:**
   >
   > Content types may designate that some data fields be set to inherit content from the master item. If you are creating the master item, you will need to populate those fields with the appropriate content. Once the master item is populated, fields designated to inherit from the master item will we prepopulated when a language is added.

6. If the content item includes a media reference, you can perform the following actions:
   - To add a new media item, click ⊕ and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
   - To select an existing media item from an asset repository, click . All digital assets are shown.
     If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

     Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
   - To clear the media item, click .
7. If the content item includes a referenced content item, you can perform the following actions:
   - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
   - To select an existing content item, click and navigate to the desired content item.
   - To clear the content item, click .
8. If a taxonomy is associated with the repository, you see the **Categories** in the right panel. To assign categories to this content item, click **Add Category**.
9. Optionally, assign tags—keywords that let users find the item quickly. Select **Tags and Collections** in the right panel. Add the tags for the asset. Press **Enter** after each tag. You can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.
10. Optionally, choose the collections associated with the item by selecting **Tags and Collections** in the right panel and locating the collection you want.

When you're satisfied with the content you created, you can perform one of the following tasks. If the repository has been configured to allow incomplete assets, you can add this asset without completing all required fields, but you'll need to complete them before you can submit the asset for review.

- To save and preview the item in a slide-out panel without leaving the content item editor, click .
- To save the item and remain in the editor, click **Save**.

- To save the item and close the editor, click **Done**.

After creating your content item, you might want to perform other actions on it.

Once you have created and saved the content item, you can see how the content will look with the different layouts associated with the content type by clicking to view in a new page or **Preview** to view in a slide-out panel. By default, the content is set to fit the browser window. You can select other layout options from the drop-down menu.

Work with Business Content Items on the Assets Page

You can view, edit, and manage your content items in many ways on the Assets page.

When you select or right-click a content item you can perform the following actions:

Task	Description
View the asset	To view the content item in a slide-out panel without leaving the Assets page, click the asset name, choose **View** in the right-click menu, or click in the actions bar or on the asset tile. To view the content item in a new tab, press Ctrl and click the asset name. When the asset is open you can also see how the content will look with the different layouts associated with the asset type, and access the editor.
Edit the content item	To edit the content item, choose **Edit** in the right-click menu or click in the actions bar or on the asset tile. While editing the content item, you can add or edit values, media, or content item references. You can also change the language assigned to the content item.
Duplicate the content item	To duplicate the content item, choose **Duplicate** in the right-click menu or click in the actions bar. A new version of the content item is created with “Copy” appended to the name. You can edit the item as needed without affecting the original version.
Copy the asset	To copy the asset to another repository, choose **Copy To** in the right-click menu or click in the actions bar, select the repository you want to copy the asset to, then click **Copy**. You must have the Manager role on the target repository. You can select more than one asset to copy at the same time. Only the current version of each asset will be copied. If the content types used for the copied content items aren't already associated with the target repository, the association will be done automatically. If you're copying a content item that references another asset, the referenced asset will also be copied to the target repository. Repository managers can also copy assets from one repository collection to another.
Lock or unlock the asset	To lock the asset so other users can't edit it, choose **Lock Assets** from the right-click menu or the **Lock** menu. If you also want to lock all the asset's dependencies, choose **Lock Assets and Dependencies** from the right-click menu or the **Lock** menu. For example, you may want to do this if you're waiting for approval. If the asset has already been locked by you, you can instead choose **Unlock Assets** or **Unlock Assets and Dependencies**.

Task	Description
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Choose **Submit for Review** from the right-click menu or the **Workflow** menu. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. You can select more than one asset to submit for review at the same time. • Workflow: Choose **Workflows** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click) to move the asset through workflow. The submission status is shown below the asset preview: • Draft • In Review • Approved • Rejected
Find similarly categorized assets	If the asset has been categorized, find assets that are assigned to similar categories as the selected asset, by choosing **Find Categorized Similarly** in the right-click menu or the **Find** menu.
Assign categories to the asset	If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset by choosing **Categories** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.
Assign tags and collections	To assign tags and collections to the asset, choose **Tags and Collections** in the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click).
View the asset's properties	To view the asset's properties, choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click). The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile; or choose **Properties** from the right-click menu, the **Sidebar** menu, or the drop-down menu in the sidebar (click); and then click the **Activity** tab.
Archive the asset	If the asset isn't used anymore, but you're not ready to permanently delete the asset, you can archive it. To archive the asset from the repository, choose **Archive** in the right-click menu or click in the actions bar. To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.
Remove the asset	To remove the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar. You can select more than one asset to delete at the same time. If the asset has been published, it will be unpublished before it's deleted, so you must have permission to unpublish the asset.

Task	Description
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset or sites that use this asset, click , then, in the drop-down menu, select **Inventory**.

Preview a Content Item

To preview the content item in a slide-out panel without leaving the Assets page, choose **Preview** in the right-click menu or click in the actions bar or on the asset tile.

While previewing the asset, you can perform the following actions:

- To view the asset in full screen mode, click **Full Screen**.
- To close the asset, click **Close**.
- You see the asset in the default layout for the asset type. If there are other layouts associated with the underlying asset type, you can perform the following actions:
  - To see how the asset will look in other layouts, or, if configured, specific site pages, select a layout or site page from the drop-down list.
  - By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking .
  - To show the ruler and manually change the device size, click , then move the handles to change the height and width.

Perform Actions While Viewing a Business Content Item

While viewing an asset, you can perform the following actions.

Task	Description
Preview the asset in layouts	If the asset has a layout associated with the underlying asset type, you can view the asset in those layouts. By default you see the asset in the content form view—the field names and values from the asset type. • If there are other layouts configured for the associated asset type, you can preview them by selecting a layout from the drop-down list. • By default, the asset is set to fit the browser window. After selecting another layout or site page, you can select different device sizes. You can also create your own device size. After selecting a device size, you can change the orientation by clicking . • To show the ruler and manually change the device size, click , then move the handles to change the height and width.
Compare content item versions	If a content item has been edited and has more than one version in a repository, you can open the content item and easily compare differences between versions by clicking **Compare Versions**.

Task	Description
View items referenced in a content item	If the content item references other digital assets or content items, in the Content Form View, next to the referenced item you want to view, click . A slide-out panel opens, showing the referenced item.
Move the asset through review	If the asset requires review, you have different options depending on how the repository is configured: • Basic review: Click **Submit for Review**. If it's already submitted and you're a repository administrator, you can **Approve** or **Reject** the asset. • Workflow: click , then, in the drop-down menu, select **Workflows** to move the asset through workflow.
Edit the asset	To edit an asset, click **Edit**. While editing a content item, you can add or edit values, media, or content item references. You can also change the language assigned to the content item, as long as content item's translation set doesn't already include a version in the newly selected language.
View the asset full-screen	To view the asset full-screen, click **Full Screen**. Click **Exit Full Screen** or press Esc to exit full-screen.
Close the asset	To close the asset, click **Close**.
View the asset's properties	To view the asset's properties, click , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.
View the asset history	To view the asset history, view a list of previous versions, or revert to a previous version, click the version number on the asset tile or click **Properties**, and then click the **Activity** tab.
View the asset's categories	If a taxonomy is associated with the repository the asset is stored in, you can view and manage the categories assigned to the asset by clicking , then, in the drop-down menu, selecting **Categories**.
View the associated conversation	To create or participate in a conversation associated with the asset, click , then, in the drop-down menu, select **Conversation**.
View where the asset is used	To view an inventory of all other assets that reference this asset, click , then, in the drop-down menu, select **Inventory**.
View the tags and collections assigned to the asset	To view and manage the tags and collections associated with the asset, click , then, in the drop-down menu, select **Tags and Collections**. Add or remove tags and collections as necessary.

Edit Business Content Items

You can edit your content items in several ways:

- Edit a Business Content Item
- Assign Categories to Business Assets
- Tag Business Assets
- Revert to a Previous Version

Edit a Business Content Item

To edit a content item, including the name or description, select the item and click in the actions bar or on the asset tile; right-click the item and choose **Edit**; or, while viewing the item, click **Edit**.

You can perform the following actions in the content item editor:

- **Edit the name.**
- **Edit the description.**
- **Add or edit media**—If the content item includes a media reference, you can perform the following actions:
  - To edit the media or media attributes, click , and choose an option.
  - To add a new media item, click and choose to add from Documents, your computer, or an external source such as Google Drive (if configured by your administrator). Navigate to the item to add and click **OK**. Select any categories, collections, channels to assign the item to and add any relevant tags, then click **Done** to add the item to the repository.
  - To select an existing media item from an asset repository, click . All digital assets are shown.
    If smart content has been enabled on the repository, you can see assets recommended for you based on the name, description, and any text fields in your asset. Click **Recommendations for You**. The top five recommended keywords are added to your search, and additional recommended keywords are shown below the search box. To add another recommended keyword, click it. You can also manually enter another keyword. To remove a keyword, click the **X** next to it.

    Choose an asset to reference, and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the asset.
  - To clear the media item, click .
- **Add or edit a referenced content item**—If the content item includes a content item reference, you can perform the following actions:
  - To edit the content item, click .
  - To create a new content item, click and choose the type of content item to create or choose **Create a New Content Item** from the list, then follow the procedure to create a content item.
  - To select an existing content item, click and navigate to the desired content item.
  - To clear the content item, click .
- To add an annotation to the item, click , select an area or click where you want to add the annotation, then enter your comment in the text box, and click **Post**.

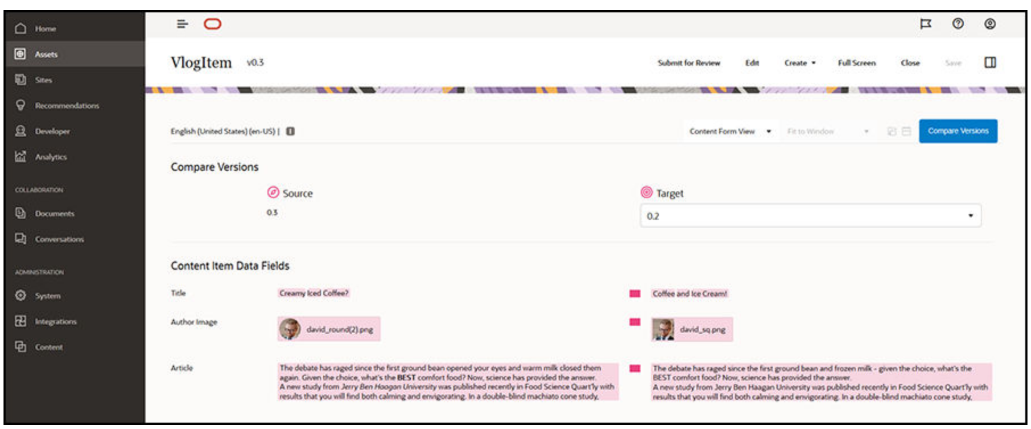
- To view annotations on the item, click . When you click an annotation, the annotation note will get focus in the conversation.
- To save and preview the item in a slide-out panel without leaving the content item editor, click .
- To save the item and remain in the editor, click **Save**.
- To save the item and close the editor, click **Done**.
- When you're done, click **Save**.

Compare Business Content Item Versions

If a content item has been edited and has more than one version in an asset repository, you can open the content item and easily compare differences between versions.

1. On the **Assets** page, right-click or select an asset with more than one version and choose **Open** in the right-click menu or click in the actions bar.
2. Click **Compare Versions**. This option is available only if the content item has more than one version.
3. Select the target version from the menu to compare to the source version. The source version is the opened version, typically the most recent version.
4. Click **Compare Versions**.

The two versions of the content item are displayed next to each other with change indicators between them and the changed areas highlighted.



If your browser is not wide enough to display the comparisons next to each other, the versions will stack, with changed areas one above the other and change indicators on the right.

Click **Compare Versions** to close the comparison and display the opened source version.

If you want to revert to a previous version, you can open it from the Activities tab of the Properties panel.

1. Click select the **Properties** pane and then click the **Activities** tab.

2. Click the version number you want to revert to, and then click **Make Current**.

18 View Business Assets and Their Data

After finding the assets you want you can view the assets and their associated information and properties in various ways.

- Open an individual asset to view its data and perform actions on the asset.
- View asset data in the sidebar panel by clicking and then selecting an option from the drop-down menu:
  - Attributes (available when viewing a business document)
  - Categories
  - Conversation
  - Inventory
  - Properties (which includes asset activity and history)
  - Tags and Collections
  - Workflows
- View archived assets.

Search, Filter, and Sort Business Assets

You can search for assets the same way you search for other files or folders. The Assets page and media picker enable you to perform more complex asset searches, filter assets to further focus your search, and sort them to help you find what you need.

Use the search box in the banner, on the Assets page, or in the media picker (when selecting a referenced asset). Search for any term, keyword, or tag. Oracle Content Management searches asset titles, asset content (including the full text of digital assets such as PDFs, Microsoft Word documents, and other text documents), and tags.

> **Note:**
>
> Tags and Localization—Manually added tags are searchable in the language used to add them. Smart tags are searchable in English, French, Italian, German, Spanish and Japanese.

The Assets page and the media picker include additional search, filter, and sort features:

- Find Assets of Similar Categories—When categories are enabled and assigned to assets, you can find assets that are assigned to similar categories.
- Smart Content—If smart content is enabled on the repository, images will automatically be assigned machine tags based on their content, improving your search. And after you search, you'll see recommended keywords to further target your search. Smart content also enables you to filter assets by color.

- Filter Assets—You can filter by collection, media group, asset type, color, status, or category. You can also perform a more complex field search, which enables you to use wildcards.
- Bookmark Asset Searches—If you frequently perform the same asset search, you can bookmark it.
- Sort Assets—You can sort assets by relevance, name, or the last date they were updated.

Find Assets of Similar Categories

To find similarly categorized assets:

1. Click **Assets** in the left navigation menu, or click **Select** when creating a content item to select media.
2. Select an asset or right-click the asset to open a contextual menu. You can select multiple assets to see results in categories similar to all those selected.

Assets are filtered to exclude content items and limit the results to only assets that are assigned to similar categories as the asset or assets originally selected. A capsule is displayed in the filter area representing the categorized similarly search. Reset the search by clearing the capsules.

Smart Content

If smart content is enabled on the repository, Oracle Content Management analyzes images and automatically applies machine tags describing the image content and determines the colors in the image. This allows you to filter assets by color and search for image content based on the automatically applied machine tags. After you add a search term, you'll also see recommended keywords under the search box. Click a keyword to add it to your search. This brings images tagged with both words closer to the top of the result list and displays additional images tagged with the added keyword.

> **Note:**
>
> Color tags are applied to images created in Oracle Content Management version 21.9.1 or later (September 2021).

If you don't see the assets you were expecting, make sure you're looking in the correct repository, and that your selected filters aren't hiding the content.

Tags and Localization

Smart tags are available in English, French, Italian, German, Spanish and Japanese. If a person has set their language preferences to one of those languages, smart content tags will be shown in the preferred language. If no language is specified in the user's preferences, or if the preferred language is not one of the languages listed, then smart tags will default to English.

Manually added tags are available in the language used to add them. If an asset includes both manually added tags and smart tags, this could result in a mix of languages in the tags. For example, if smart content has assigned tags in English and a user manually adds additional tags in English, when a user with Spanish set as their language preference views the asset and tags, they will see the smart content tags in Spanish and the manually added tags in English.

Filter Assets

On the Assets page, you can filter what you see. If the filter features are hidden, click . You can apply the following filters:

- **Collection**—Select a collection in the drop-down list. You see only the collections you have access to that are in the selected repository. Select **Not In Collection** to see assets not associated with any collection. Standard collections are signified by before their names, and dynamic collections are signified by .
- **Media group**—Filter by images, videos, documents, content items, or other.
- **Asset type**—Filter by any asset type available in the selected repository.
- **Color**—If smart content is enabled on the repository, you can filter images by color, selecting up to five colors.

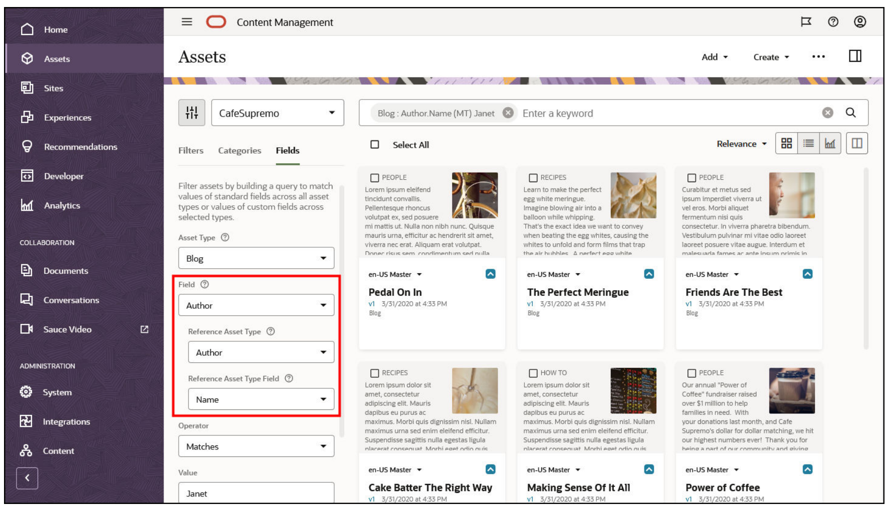
  > **Note:**
  >
  > Color tags are applied to images created in Oracle Content Management version 21.9.1 or later (September 2021).

- **Status**—You can limit your view to items that have properties determined by the repository where they're managed. For example, a publishing policy may state that the assets can only be published if they've been approved. After those policies have been applied to the assets in the collection, you can then filter to see the following types of status:
  - **Not ready**—Show assets that include required fields that are missing data and are therefore not ready for publishing.
  - **Approval**—Filter by approval status, such as draft, translated, in review, approved, or rejected.
  - **Categorization**—Show assets that have been recategorized since last published. Show assets that are not categorized.
  - **Workflow**—Show assets that are in workflow.
  - **Lock**—Filter by whether the asset is locked by you, locked by others, or not locked.
  - **Linked**—Show digital assets that have been added from Documents.
- **Category**—If a taxonomy is associated with the selected repository, you can filter by categories on the **Categories** tab. Taxonomies provide a hierarchical, folder-like structure within a category, and by default will search through all children of the selected node. Next to each category, you'll see the number of assets assigned to that category and any children of the category.

  By default, when you select a category, you'll see all assets assigned to that category or any children of the selected category. If you prefer to limit your search to a specific parent category, select the category and deselect **Include All Children**.

  If there is a large number of categories in a taxonomy, you can search for specific categories using the search field on the Categories tab.

- **Fields**—You can search for standard property values (for example, created by or description), attribute values from custom asset types, or EXIF metadata (such as aperture or orientation) from camera images on the **Fields** tab. You can also use wildcards in your search value.
  To search for values:
  1. Select an **Asset Type**.
     – To search standard property values, select **All**.
     – To search attribute values from custom asset types, select a custom asset type.
     – To search for EXIF metadata, select **All** or select a digital asset type that supports JPG, PNG, or TIFF files (this includes the Image asset type).
  2. Select a **Field**.
     If you select a reference field, you see additional options:
     – Select a **Reference Asset Type**. This limits the search to referenced assets of the selected asset type.
     – Select a **Reference Asset Type Field**. This limits the search to the selected field in the referenced asset type.



  3. Select an **Operator**.
  4. Enter a value to search for. You can use ? as a wildcard to match any single character and * as a wildcard to match zero or more characters.
  5. Press Enter.

  To add more filters, click **Add**. Additional filters are treated differently depending on what they are:
  – Unique fields from the same asset type are grouped together and searched with "and" between the filters. For example, if you filter on the *Article* asset type for the *Author* field matching "Susan Brown", then add another filter on the *Article* asset type for the *Title* field containing "coffee", only articles authored by Susan Brown and with "coffee" in the title will be returned in the search.
  – Repeated fields from the same asset type (with different operators or values) are searched with an "or" between the filters. For example, if you filter on the

Article asset type for the *Title* field containing "coffee", then add another filter of the *Article* asset type for the *Title* field containing "latte", articles with "coffee" or "latte" in the title will be returned in the search.

– Unique asset types are searched with an "or" between the filters. For example, if you filter on the *Article* asset type for the *Author* field matching "Susan Brown", then add a filter on the *Press Release* asset type for the *Author* field matching "Susan Brown", articles or press releases authored by Susan Brown will be returned in the search.

To remove a filter, in the search bar, click next to the filter.

Bookmark Asset Searches

Any search and filter conditions you apply to the assets view are added to the URL, so you can bookmark an asset search using your browser's bookmarking feature.

Sort Assets

Use the drop-down menu on the right, under the asset search box to sort assets by relevance, name, or the last date they were updated. Relevance sorts by the closest matches to your text searches, or, if you're not searching for text, it sorts by your most recently viewed assets.

View Conversation for a Business Asset

To view the asset's conversation, select or open the asset, click , then, in the drop-down menu, choose **Conversation**.

You can participate in the conversation as needed.

View Inventory for a Business Asset

To view an inventory of all assets that reference this asset, select or open the asset, click , then, in the drop-down menu, select **Inventory**. Inventory information is divided into tabs:

- **Dependencies**: This tab lists the names, types, and status of assets this asset references.
- **Referenced By**: This tab lists all assets that reference this asset.

> **Note:**
>
> If you don't see all of the tabs, you may need to click the or to scroll the tab headings.

Hover over an asset in either the **Dependencies** tab or **Referenced by** tab to enable .

Click to preview the asset in a slide-out panel.

View Properties for a Business Asset

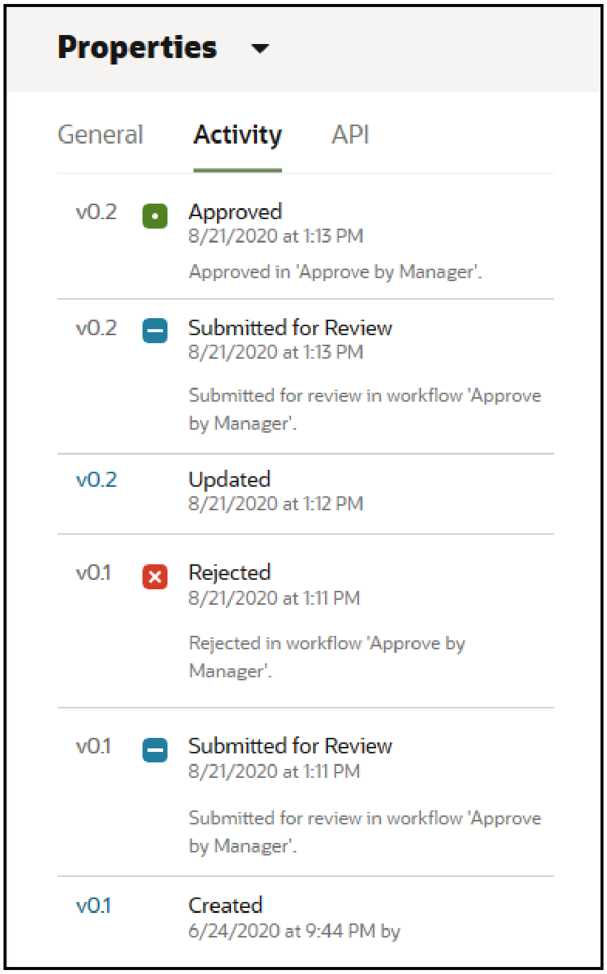
To view the asset's properties, right-click or select the asset and choose **Properties** from the right-click menu or the **Sidebar** menu; or select or open an asset, click , then, in the drop-down menu, choose **Properties**. The properties include read-only information such as when the item was created and last updated.

Property information is divided into tabs:

- **General** – includes general information about the asset such as name, description, asset type, version, size, and language. It shows the asset URL, which you can copy by clicking . It also shows when the asset was created and updated, and whether the asset is locked.
  If an image asset was created with a camera, whether that's an actual camera or a device like a phone, laptop, or webcam, you'll also see camera data (expand to view). The device embeds this data in the image file. It includes information such as the type of device, who took the picture, the time and date it was taken, where it was taken (GPS location), and camera information such as shutter speed, aperture, and lens information. This information can help you understand how the image was captured and, if you need to retake the picture, how to recreate or improve the image.
- **Activity** – details specific activities such as review status changes, revision history, and other activities.
- **API** – displays the asset ID and management URL. To copy an ID or URL to the clipboard, click next to it. To view the associated JSON data for the asset, click { } next to the management URL.

View Activity (Asset History) for a Business Asset

To view a list of previous versions of an asset, click the version number on the asset tile; or choose **Properties** from the right-click menu or the **Sidebar** menu, and then click the **Activity** tab.



- To view a previous version, click the version number in the Activity tab. You can only edit the current version.
- To revert to a previous version, click the version number, and then click **Make Current** on the banner menu. If the current version is a video asset and the previous version is not, then you can't make the previous non-video version current.

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Organize Business Assets

There are several ways to organize your assets to make them easier to find:

- **Repositories**—All assets are managed in a particular repository, which you select when you add the asset. Users select a repository before searching for or working with assets.
- **Collections**—Collections are a way to group related assets for a specific business need such as a marketing campaign. You can create standard static collections or dynamic collections based on a search query. Assets can belong to one or more collections.
- **Full-text indexing**—Content items and digital assets such as PDFs, Microsoft Word documents, or other text documents are full-text indexed, so users can search for any text found in the content item or document.
- **Smart content**—If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content of the image.
- **Tags**—Tags, like keywords, are terms that a user might search for. If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content and colors in the image, but you can also add manual tags for any kind of asset. For example, you might have a document or content item about an upcoming conference. You could tag it with "conference", "event", "webinar", "breakouts", and other similar terms.
- **Categories**—If a taxonomy is associated with the repository you're viewing, you can assign categories to the asset. Categories provide a hierarchical organization that maps to your business structure and allows users to drill-down to find what they need.

Use Collections in Business Asset Repositories

A collection is a way to group a subset of assets within a repository. A repository may have many collections, but each collection is associated with only one repository.

A collection can be created in multiple ways:

- Standard collection—You can create a standard static collection to quickly and easily manage a subset of documents in a repository. For example, you may have a repository with all your invoices. You could use collections to group together the invoices for each customer. The invoices would still be managed all together in the repository, but you could manage invoices for a particular customer separately.
- Dynamic collection—Asset experts can create dynamic collections by defining complex asset search queries, choosing data fields, search operators, and values. They then share those dynamic collections so other users can quickly and easily filter assets that are relevant for a specific business task or their day-to-day activities.

Your access to collections depends on your role in both the repository and for the collection:

- If you have access to a collection, you have access to the assets in that collection, subject to granular permissions.
- You must be a contributor or manager for the repository to be able to create a standard collection or a dynamic collection in the repository.

- You must be a contributor or manager for the collection to be able to add assets to the collection.
- You must be a manager for a collection to be able to manage it on the **Collections** page. You can share a collection, lock or unlock the assets in the collection, view the properties for the collection, or delete the collection.
- When viewing a repository on the Assets page, the Collection list in the Filters area includes the collections to which you have at least View access. Standard collections are signified by before their names, and dynamic collections are signified by .

Create a Standard Collection in a Business Asset Repository

Standard collections are a way to group business documents and structured business content. You must be an enterprise user with Contributor or Manager access to the parent repository to create and share collections.

To create a standard collection:

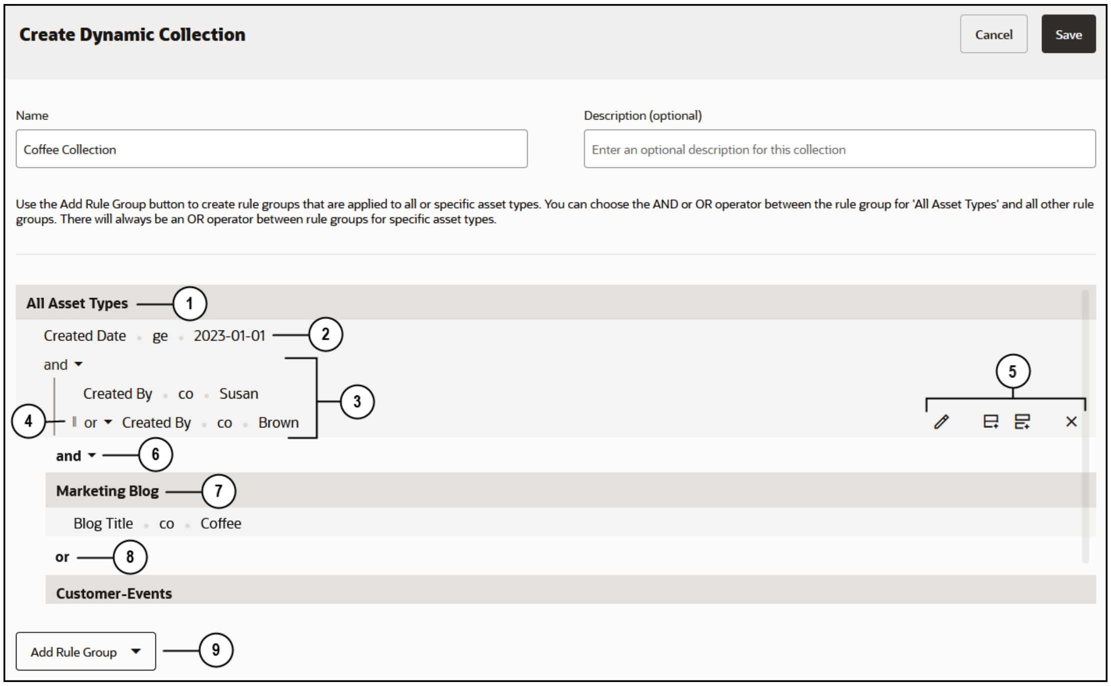
1. Click **Assets** in the left navigation panel.
2. The Asset view opens. Choose the repository you want to use then click **More Actions** and select **Collections**.
3. Click **Create**, and then choose **Standard Collection**.
4. Enter a name for the collection.
5. Click **Create**.
6. Add assets to the collection.
7. If your repository administrator has enabled the collection Viewer role in the repository, you must share the collection with anyone you want to be able to see and use it.

To change a collection's name or channels, you must have Contributor or Manager access to the collection. Select the collection and click **Properties** from the menu bar or right-click menu. You can edit the details about the collection on the property page.

Create a Dynamic Collection in a Business Asset Repository

Dynamic collections are a way to group content items, digital assets, and documents based on complex search criteria. They're created by asset experts to then be shared with other users. You must be an enterprise user with Contributor or Manager access to the parent repository to create and share collections.

A dynamic collection is a search query made up of top-level *rule groups* that apply to all asset types or a selected asset type. Each rule group is made up of rules and, possibly, rule subgroups (nested rules). A rule is defined by a selected data field, an operator, and a value. If the top-level rule group applies to all asset types, you can search across the system properties that all assets contain. If the top-level rule group applies to a specific asset type, you can also search the data fields used in that asset type.



Callout	Description
1	This top-level rule group applies to all asset types.
2	This is a rule. This example rule filters assets with a "Created Date" greater than or equal to (ge) January 2, 2023.
3	This is a rule subgroup—a group of nested rules. These example rules filter assets with a "Created By" value that contains (co) "Susan" or "Brown".
4	Click and hold this icon ( ) to move this rule to another location.
5	• (**Edit Rule**)—Edit the rule. • (**Add Rule**)—Add a rule to this level. • (**Add Rule Subgroup**)—Add a rule subgroup below this level. • (**Delete**)—Delete this rule or rule subgroup.
6	Select whether the All Asset Types rule group should be additive (**and**) or exclusive (**or**) with all other top-level rule groups for specific asset types.
7	This is a top-level rule groups for a specific asset type.
8	The operator between all top-level rule groups for specific asset types will always be exclusive (**or**).

To create a dynamic collection:

1. Click **Assets** in the left navigation panel.
2. The Asset view opens. Choose the repository you want to use then click **More Actions** and select **Collections**.
3. Click **Create**, and then choose **Dynamic Collection**.
4. Enter a name, and, optionally, a description for the collection.
5. Add rule groups and rules to define the search query for the dynamic collection.

- To add a top-level asset type rule group, click **Add Rule Group**, and then choose **All Asset Types** or a specific asset type. The asset type selection applies to all rules and rule subgroups in this top-level rule group.
- To add a rule, hover over the rule group to which you want to add the rule, and click . You can also hover over a rule at the same level to which you want to add the rule.
  Define the rule by selecting a data field, selecting a search operator, and then entering a value. When entering a text value, you must press Tab or Enter after entering the value. When you're done defining the rule, click **Save**.
- To add a rule subgroup (nested rules), hover over the rule group or rule to which you want to add the subgroup, and click . Define the nested rule.
- Between rules and rule groups, select whether the rules should be additive (**and**) or exclusive (**or**).
  If you have a top-level **All Asset Types** rule group, you can select whether it will be additive or exclusive with all other top-level asset type rule groups. However, all other top-level rule groups for specific asset types will always be exclusive.
- To move a rule, click and hold , and drag the rule to the desired location.
- To edit a rule, click .
- To delete a rule or rule subgroup, click . If you delete a rule group, all the subgroups and rules that it contains will also be deleted.
- To expand or collapse a top-level rule group, click .

6. Click **Save** when finished.

If your repository administrator has enabled the collection Viewer role in the repository and you want to make this dynamic collection available to other users, you must share the collection with anyone you want to be able to use it.

To change a collection’s name or channels, you must have Contributor or Manager access to the collection. Select the collection and click **Properties** from the menu bar or right-click menu. You can edit the details about the collection on the property page.

Share a Collection in a Business Asset Repository

Sharing a collection is done the same way you share folders: select the collection, click **Members**, and add members to the collection.

- You must be an enterprise user with the manager role for the collection to share the collections with others.
- You can share a collection only with users and groups that are members of the parent repository.
- By default, if a user has access to a repository, they have implicit view access to all collections in that repository. However, if your repository administrator has enabled the collection Viewer role in the repository, you must share the collection with anyone you want to be able to see and use it.

Add Assets to or Remove Assets from Collections in Business Asset Repositories

You can add an asset to a standard collection when you create or upload it, or you can edit collection association at a later time. You must have Contributor or Manager access to the collection to be able to add assets to or remove assets from a collection.

Add an Asset to a Collection When Creating or Adding the Asset

When adding a business document or creating a content item, you can open the collection and create or add the asset directly in the collection.

Alternatively, click , then, in the drop-down menu, choose **Tags and Collections**. Click the **Collections** box, start typing a collection name, and then select the collection you want.

Add Existing Assets to a Collection

You can add or edit the collections an asset belongs to.

1. Find the assets you want to edit.
2. Right-click or select the assets, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Edit the current collections or add additional collections.
   If you selected multiple assets and some of the assets are already assigned to collections, you can click the collection, and then click **Assign to All** to assign the collection to all selected assets.

Remove Assets from a Collection

You can remove assets from a collection. Removing an asset from a collection doesn't delete it from the repository.

1. Find the assets you want to remove from a collection.
2. Right-click or select the assets, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Remove the collections.

Tag Business Assets

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

If your repository administrator enabled smart content on the repository, images are automatically tagged based on the content and colors in the image, but you can also manually add tags to any kind of asset.

You can add tags to an asset when you create or upload it or edit the tags at a later time. You can search for items by using a tag as a search term, helping you find files quickly.

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

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

- When adding tags, press **Enter** after each tag.
- Tags aren't case-sensitive. "Lake" is the same as "lake" when you're tagging.
- You can use special characters, such as asterisk (*) and parentheses (), but avoid doing so. It can make searching for the tagged object difficult.

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

Add Tags to Existing Items

You can add or edit tags to existing assets.

1. Find the assets you want to edit.
2. Right-click or select the assets you want to tag, and choose **Tags and Collections** in the right-click menu or the **Sidebar** menu.
3. Edit the current tags or add additional tags.
   If you selected multiple assets and some of the assets already have tags assigned to them, you can click the tag, and then click **Assign to All** to assign the tag to all selected assets.

You can also tag items while creating the item.

Assign Categories to Business Assets

If a taxonomy has been associated with the repository used to manage the assets you're viewing, you can view, assign, and remove asset categories to organize your assets.

To view and manage categories for an asset:

1. Right-click or select one or more assets, choose **Categories** in the right-click menu or the **Sidebar** menu, or click , then, in the drop-down menu, select **Categories**.
   You see the categories assigned to the selected assets. The taxonomy abbreviation precedes the category name.
2. Add or remove categories as necessary.
   - To add a category, click **Add Category**. If more than one taxonomy is assigned to the repository, you can change the taxonomy selection in the drop-down list. The taxonomy listed will default to the last one you used until you log out. You can search for categories or expand the taxonomy nodes to find the category or categories in the taxonomy you want to add, make your selections, and click **Add**. You can add more than one category to the selected assets at a time within each taxonomy. If you want to add categories from multiple taxonomies, you must finish adding the categories from one taxonomy first before selecting categories from another.

- To remove a category, hover over the category, and then click .
- If you selected more than one asset and one of the assets is assigned to a category you want to assign to all the selected assets, hover over the category, and then click .

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

If you add or remove a category, an icon ( ) is displayed with the asset to show that it has been recategorized. You must publish the asset for the category changes to appear in publishing channels. Once you publish the asset, the icon is removed and returns only if the asset is recategorized again. Enable the **Recategorized** filter to see a list of all assets that have been recategorized to quickly determine which assets should be republished.

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Review Business Assets

You can review assets with basic out-of-the-box approve/reject workflow, or, if configured, you might be able to take advantage of workflow from Oracle Integration. It's possible for different repositories to have different review or workflow options.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject workflow. To take advantage of additional workflow options, upgrade to the Premium Edition.

- Use Basic Review for Business Assets
- Change the Status of Business Assets
- Use Workflows for Business Assets

Use Basic Review for Business Assets

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject workflow. To take advantage of additional workflow options, upgrade to the Premium Edition.

If you need to get an asset reviewed, right-click or select the asset, then choose **Submit for Review** from the right-click menu or the **Workflow** menu.

If an asset is already submitted for review and you're a repository administrator, you can **Approve** or **Reject** the asset.

You can select multiple assets to submit for review, approve, or reject at the same time.

The submission status is shown below the asset preview:

- Draft
- In Review
- Approved
- Rejected

Change the Status of Business Assets

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

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

- The status of an asset can only be changed when you view the asset.
- Keep in mind that only managers or owners of a repository can change the status of an asset. If a repository was shared with you and you don't have a manager role, you won't be able to change the status.
- If you upload a new version of a business document, it's automatically labeled as Draft.

An asset's status is designated by its icon:

- Approved
- Rejected
- Draft
- In Review

To change the status of an asset:

1. On the **Assets** page, right-click or select the asset.
2. Choose the new status from the right-click menu or the **Workflow** menu.

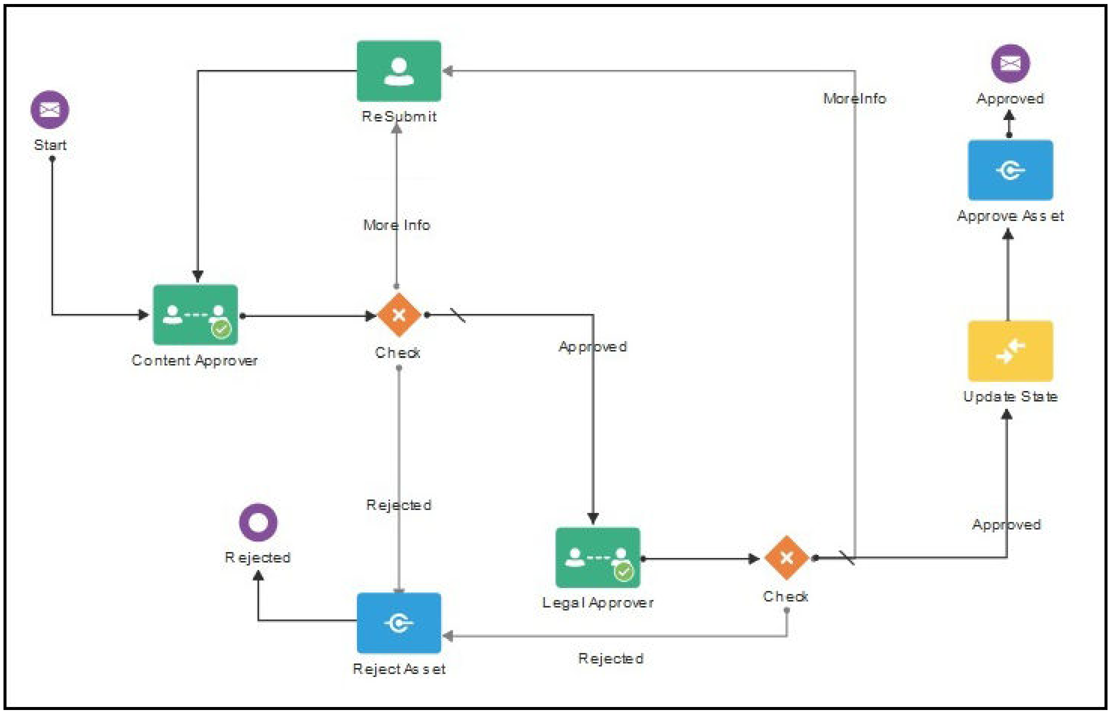
Asset Workflows

If your service and content administrators have configured Oracle Content Management to use additional workflow options, a change in asset status may be done automatically as an asset moves through a workflow.

Use Workflows for Business Assets

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject review functionality. To use workflows and take advantage of the full feature set, upgrade to the Premium Edition.

If your service administrator has integrated Oracle Content Management with Oracle Integration, and your content administrator has registered Oracle Integration workflows, you may have additional workflow options available to you. For example in the following diagram, an asset submitted to a workflow can either be rejected, returned for more information, passed on for additional approval, and then approved.



Once your content administrator has registered a workflow, assigned it to a repository, added you as a member, and assigned you to a workflow role, the workflow is available to use when working with assets.

The workflow pane has two tabs representing three possible workflow states:

- **Submit** (displayed if an asset has no workflows in progress)—This tab is where you submit the asset for review. You can submit an asset to only one workflow at a time, so if an asset is automatically submitted to workflow during creation or if the asset has already been manually submitted to workflow on its own or as a dependent of a parent asset, you won't be able to submit it to another workflow until the current workflow is completed. Some workflows may be selected by default (configured by your repository manager). If they're required workflows, you won't be able deselect them.

  > **Note:**
  >
  > Assets added from Oracle Content Management or from third-party cloud storage providers currently don't support automatic workflow assignment.

- **In progress** (replaces the Submit tab once a workflow is initiated for an asset)—This tab lists the progress of the asset through the workflow. If you have a responsibility for a step that hasn't been completed, the actions you can take are available in a selection box. When an action is finished, the next step, if there is one, is added to the list. Completed steps identify the person and date when an action was taken. If the workflow has several completed actions, they may be grouped under an expandable heading labeled **Audit Trail**.
  When viewing a parent asset that has been submitted with its dependencies, the **In progress** tab of the Workflow pane shows the workflow steps, but the dependent assets show only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted.

- **Completed** (always displayed)—Displays a list of completed workflows for the asset if there are any, and the date each workflow was completed. Completed workflows can include both approved and rejected workflows. You can expand a completed workflow to see a detailed list of the actions in the workflow.

Select a topic to get started:

- Submit Business Assets to Workflow
- View Workflow Status for a Business Asset
- Cancel Workflow for a Business Asset
- Complete Your Business Asset Workflow Tasks
- Workflow Process for a Business Asset with Dependencies
- Working with Extended Workflow for a Business Asset

Submit Business Assets to Workflow

> **Tip:**
>
> You might want to lock assets while they're in review so others can't modify them during the review process.

To submit assets to workflow:

1. On the **Assets** page, right-click or select the asset you want to submit to a workflow.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu. If the asset hasn't been submitted to workflow, you'll see the **Submit** tab. If you see the **In progress** tab, the asset has already been automatically submitted to workflow during creation, or manually submitted to workflow on its own or as a dependent of a parent asset. The current workflow must be completed before you can submit the asset to another workflow.
3. If the asset has dependencies, select whether you want to submit the asset's dependencies to workflow along with the asset.
4. Select a workflow from the list of available ones and click **Submit for Review** to initiate a workflow.
   Remember, some workflows may be selected by default (configured by your repository manager). If they are required workflows, you won't be able deselect them. If assets are automatically submitted to workflow during creation, you'll see an "already in review" section at the bottom of the tab; expand the section to see the workflow.

View Workflow Status for a Business Asset

To view the workflow status for an asset:

1. On the **Assets** page, right-click or select the asset for which you want to view workflow status.

2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.

In Progress Workflow

If the asset is currently in workflow, you can see the status on the **In progress** tab. Completed steps identify the person and date when an action was taken. If the workflow has several completed actions, they may be grouped under an expandable heading labeled **Audit Trail**. Some assets may have extended workflow, where they remain in workflow even after being approved.

When viewing a parent asset that has been submitted with its dependencies, you see the completed workflow steps, but a dependent asset shows only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted. You can get to a dependent's parent asset from the **Referenced By** tab of the Inventory pane.

If you have a responsibility for a step, the actions you can take are available in a selection box. When the action is finished the next step, if there is one, is added to the list.

To cancel the workflow and return the asset to a draft state, click **Cancel Workflow**.

Completed Workflow

If an asset has been through workflows previously, click the **Completed** tab to see the history of workflows the asset has completed, including both approved and rejected workflows. Click a workflow to expand it and see a detailed list of the workflow actions.

Cancel Workflow for a Business Asset

You must have initiated the workflow or be a service administrator to cancel workflow.

To cancel the workflow for an asset:

1. On the **Assets** page, right-click or select the asset for which you want to view workflow status.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.
3. On the **In progress** tab, click **Cancel Workflow**.
   When canceling the workflow for a parent asset that has been submitted with its dependencies, the workflow will be canceled for the parent and its dependencies, the parent asset will be returned to a draft state, and the dependent assets will revert to their previous status (before being submitted with the parent asset).

Complete Your Business Asset Workflow Tasks

There are several ways to view and take action on your workflow tasks:

- Workflow Notifications
- Workflow Tasks Page
- Asset Workflow Pane

Workflow Notifications

If you are assigned a role associated with a workflow step and have a responsibility to complete a workflow task, you'll receive an email notification with links to the actions available to you or to view the workflow online. Viewing the workflow online opens the asset in Oracle Content Management. Available actions are dependent on the workflow and are listed in the **Action** menu of the step for which you are responsible.

Workflow Tasks Page

To see a list of all workflow tasks for which you are responsible:

1. On the **Assets** click **More Actions** and select **Workflow Tasks**. A list of all tasks needing your attention across all repositories is displayed.
2. Take action. Available actions will depend on the workflow and your role.
   - Select the task you want to take action on and click the action you want to take in the banner menu. You can select multiple tasks and take an action across all selected tasks, provided the action is common to each task. For example, **Acquire** might not be available when multiple tasks are selected, but **Approve** and **Reject** might if you have review rights in the workflows used for the selected tasks.
   - To open the asset, click the asset name or select the task you want to take action on and click **Preview** in the banner menu. Then, in the Workflow pane, select the action you want to take from the **Action** menu of the associated task. **Preview** isn't available when multiple tasks are selected, because it pertains to previewing an individual asset.

Asset Workflow Pane

To move assets through workflow while viewing an asset:

1. On the **Assets** page, right-click or select the asset you want to submit to a workflow.
2. Choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.
3. On the **In progress** tab, if you have responsibility for a step, select the action you want to take from the **Action** menu of the associated task in the workflow, add an optional comment, and confirm the action. When the action is finished the next step, if there is one, is added to the list.
   If you're viewing a dependent asset that was submitted with its parent, you see only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted. You can get to the parent asset from the **Referenced By** tab of the Inventory pane.

Workflow Process for a Business Asset with Dependencies

When you submit an asset to workflow along with its dependencies, each dependency's status changes according to its existing status and workflow actions.

If...	Then...
A dependent asset is already approved	It stays approved. It won't be put into review with the parent asset.
A dependent asset is already in review as a dependent to another parent asset	It remains in its existing workflow. However, if the more recently submitted parent asset gets approved, the dependent asset will also be approved. Or, if the existing workflow gets rejected, the dependent asset becomes part of the workflow of the more recently submitted parent asset. **Note:** If the dependent asset was submitted to workflow on its own, it stays in its own workflow, and its status changes based only on actions in that workflow.
A dependent asset is already rejected	It's put into review with the parent asset.
A parent asset gets rejected	The dependent asset reverts to its previous status (before being submitted with the parent asset).
The workflow is canceled for a parent asset	The dependent asset reverts to its previous status (before being submitted with the parent asset)

To move the assets through workflow, you do so with the parent asset. While viewing a dependent asset, you can get to the parent asset from the **Referenced By** tab of the Inventory pane.

When viewing the parent asset, the **In progress** tab of the Workflow pane shows the workflow steps, but a dependent asset shows only that the asset is in review, along with the version number, the name of the parent asset it was submitted with, the submitting user's name, and when it was submitted.

Whether you're looking at the parent asset or one of its dependencies, the **Completed** tab of the Workflow pane shows all the activity for that asset.

Working with Extended Workflow for a Business Asset

Extended workflow allows an asset to remain in workflow even after it has been approved, enabling you to complete additional workflow actions.

- To find assets that have extended workflow, on the **Assets** page, select the **Approved** and **In Workflow** status filters.
- To view the workflow, select an asset, then choose **Workflows** from the right-click menu or the **Sidebar** menu, or click to open the additional properties pane and select **Workflows** from the pane menu.

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Manage Business Assets

You can view, edit, and manage your business assets in many ways:

- Lock or Unlock Business Assets
- Archive Business Assets
- Delete Business Assets

Lock or Unlock Business Assets

You can lock an asset to keep users from editing the asset. For example, you may want to do this if you're waiting for approval.

Here's what you need to know about locking an asset:

- Any user who can view an asset can lock it, but to unlock it you must have been the one to lock it, or you must have the Manager role for the repository.
- You can lock or unlock multiple assets at the same time.
- If the asset has dependencies, you can lock just the asset or the asset and its dependencies.

To lock an asset:

1. On the **Assets** page, right-click or select the asset.
2. Choose **Lock Assets** or **Lock Assets and Dependencies** from the right-click menu or the **Lock** menu in the actions bar.

To lock all the assets in a collection:

1. On the **Assets** page, click **More Actions** and select **Collections**.
2. Select one or more repositories.
3. Choose **Lock Assets by Collection** from the **Lock** menu in the actions bar or the right-click menu.

To unlock an asset, instead choose **Unlock Assets** or **Unlock Assets and Dependencies**.

Archive Business Assets

You may have assets that aren't currently being used, but you're not ready to delete them yet. You can *archive* those assets. Archived assets are billed at 1/200th the cost of normal assets.

To archive an asset:

1. On the **Assets** page, select the item you want to archive.
2. Click .

To view archived assets, on the **Assets** page, click **More Actions** in the banner menu, then select **Archived Assets**.

Here are some things to consider when you archive assets:

- You can't archive assets that are locked.
- You can’t archive an asset that’s being used in a content item. For example, if an image is referenced in a content item, you can’t archive that image.
- You can't modify assets while they are archived.
- The asset's approved or rejected status is maintained when it's archived. If the asset is in review when it's archived, its status changes to draft.

You can also access and perform actions on archived assets through the REST API.

Manage Archived Business Assets

You can view, download, restore, or permanently delete an archived asset.

To view archived assets, on the **Assets** page, select a repository, click **More Actions** in the banner menu, then select **Archived Assets**.

You can search and filter archived assets as you would any other asset, with the addition of being able to filter by restoration status.

When you right-click or select an archived asset, or while you're viewing an archived asset, you can perform the following actions. Depending on the size of the window, you might need to click **More** on the Archived Assets page or **Actions** while viewing an archived asset to see some of the options.

Task	Description
Download the asset	To download a business document to your computer: • On the Archived Assets page, choose **Download** in the right-click menu or click in the actions bar or on the asset tile. • While viewing an archived asset, click **Download** in the banner menu. You can download only business documents, not content items.
View the asset's attributes	You can only view the asset's attributes while viewing the asset. To view the attributes, click **Attributes** in the banner menu; or , then, in the drop-down menu, select **Attributes**.
View the asset's properties	To view the asset's properties: • On the Archived Assets page, choose **Properties** in the right-click menu or the actions bar, or click . • While viewing an archived asset, click **Properties** in the banner menu; or , then, in the drop-down menu, select **Properties**. The properties include read-only information such as when the item was created and last updated.

Task	Description
Open the asset	To open the asset, on the Archived Assets page, choose **Open** in the right-click menu, or click in the actions bar or on the asset tile.
Restore the asset	To restore an archived asset: • On the Archived Assets page, choose **Schedule Restoration** in the right-click menu or the actions bar. • While viewing an archived asset, click **Schedule Restoration** in the banner menu. Restoring an asset my take up to 24 hours. While the asset is pending restoration, you'll see a banner on the asset tile saying "Restoration Scheduled".
Cancel restoration	To cancel a pending restoration, choose **Cancel Restoration**. • On the Archived Assets page, choose **Schedule Restoration** in the right-click menu or the actions bar. • While viewing an archived asset, click **Schedule Restoration** in the banner menu.
Permanently delete the asset	You can only delete an archived asset from the Archived Assets page. To permanently delete the asset from the repository, choose **Delete** in the right-click menu or click in the actions bar.

Delete Business Assets

Important:

When an asset is deleted, it is permanently removed. Assets are not moved to Trash where they can be recovered later. If you're not ready to permanently delete the asset, you can instead archive the asset.

To delete an asset:

1. On the **Assets** page, select the item you want to delete.
2. Click .

Note:

You can’t delete an asset that’s being used in a content item. For example, if an image is referenced in a content item, you can’t delete that image.

Part IV

Administer Repositories

You administer all the building blocks of the content management structure in the Content area under Administration in the left navigation menu. Depending on your needs, you'll probably work mostly with one type of repository, either digital asset repositories or business asset repositories. You should understand your options before you start creating repositories as these repositories have different purposes and different features.

You can perform the following tasks to manage digital asset repositories or business asset repositories:

- Manage Repositories
- Manage Asset Types
- Manage Taxonomies
- Manage Workflows
- Manage Custom Roles

You can perform the following additional tasks to manage digital asset repositories:

- Manage Localization Policies
- Manage Publishing Channels
- Manage Rendition Policies
- Manage Audience Attributes
- Manage Ranking Policies

If you're using Oracle Content Management Starter Edition, you have limited asset support:

- Only 5,000 assets for free
- Includes out-of-the-box asset types for images, videos, and files
- Only 5 custom asset types
- No custom renditions (supports automated renditions)
- No support for Video Plus
- No support for translation jobs
- No support for ranking policies
- No support for smart authoring
- No support for the Adobe Creative Cloud extension

To increase the number of assets and take advantage of the full feature set, upgrade to the Premium Edition.

22 Manage Repositories

Repositories are a way for you to manage all the assets needed for a project, department, or campaign in a group. You must be a repository administrator to create and share asset repositories.

There are two types of repositories: business repositories and asset repositories. *Business asset repositories* store business documents (such as invoices, contracts, engineering drawings, or reports). *Digital asset repositories* store assets that need to be published for use within digital experiences (websites and other channels) or translated into multiple languages.

After creating a repository, it must be shared with other people in order for it to be used.

If you want multiple sites to share the same asset repository while you still control access to site-specific content, you use a taxonomy to apply the granular security. For example, site contributors would be able to access common assets such as corporate logos and assets intended for use on sites they manage, but not have access to assets intended for other sites.

By default the **Repositories** page shows all repositories, sorted by name. Use the drop-down menus on the right to filter by repository type and to change the sort order. You can also use the search box to find a repository by name.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only one asset repository. Business repositories aren't supported. To increase the number of repositories and take advantage of the full feature set, upgrade to the Premium Edition.

You can perform the following tasks to manage digital asset repositories or business asset repositories:

- Create a Business Asset Repository
- Create a Digital Asset Repository
- Share a Repository
- Granular Permissions
- Copy Assets from One Repository to Another
- Import Assets
- View Repository Properties

You can perform the following additional tasks to manage digital asset repositories:

- Integrate Translation Connectors
- Republish HTML Renditions of Assets
- Give a Site Access to Multiple Repositories

You can also convert a legacy repository to a digital asset repository to support digital asset types.

Create a Business Asset Repository

Business asset repositories store business documents (such as invoices, contracts, engineering drawings, or reports) and structured content in the form of a content item, such as an employee record or supplier data. You must be a repository administrator to create and share asset repositories.

Business asset repositories are different than digital asset repositories. You should understand your options before you start creating repositories as these repositories have different purposes and different features.

> **Note:**
>
> Business asset repositories aren't supported in Oracle Content Management Starter Edition. To take advantage of the full feature set, upgrade to the Premium Edition.

Business Asset Repository Creation Overview

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

- Business asset repositories don't allow you to publish or localize assets. Although you can't add translations for assets in business asset repositories, you can mark an asset as being in a particular language. If you need to publish or localize assets, create a digital asset repository instead.
- Try to use meaningful names for the repository and add a clear description so users will know what content is stored there. After you share a repository, it appears in a user's asset list. Make sure a user understands where it's used.
- Don't use special characters when naming your repository.
- You can use asset types and taxonomies created by other administrative users. Asset types don't have to explicitly shared with you if you have an administrative role.
- Even if the repository is shared, some of the individual features within it are not.
  - Non-administrative users will be able to see all associated asset types in the filter pane on the asset page, and they can view and edit assets of those types without explicit sharing. To be able create a new asset, the user must have at least the contributor role on the repository.
  - Non-administrators will be able to categorize assets based on the taxonomies associated with a repository.

Create a Business Asset Repository

To create a business asset repository:

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

2. Choose **Repositories** from the drop-down list, click **Create**, then select **Business Repository**.
3. Enter a name for the repository. Don’t use special characters in the name.
4. Enter an optional description describing where the repository will be used.
5. Choose the asset types to be used with the repository.

> **Note:**
>
> You can't remove asset types that are associated with connectors selected for this repository.

6. Choose the taxonomies to be used with the repository. Only promoted taxonomies are available in the list.
7. Choose the default language for the repository.
8. Optionally, add additional languages allowed in the repository. Although you can't add translations for assets in business repositories, you can mark an asset as being in an allowed language.
9. Choose the content connectors to be used with the repository. Content connectors integrate third-party cloud storage providers. Only enabled connectors are available in the list. When you add content connectors, repository users will be able to add content from those third-party cloud storage providers. If there are asset types associated with the content connectors, they'll automatically be added to the list of asset types.
10. If you want users to be able to save assets with default or missing values in required fields, to be completed later, enable **Not Ready for Use Assets**. They must still complete all required fields before they can submit the asset for review.
11. By default, if a user has access to a repository, they have implicit view access to all collections in that repository. If you want to be able to limit who can view a particular collection, enable **Collection Viewer Role**. When enabled, a Viewer role is available in collections, and users can only see collections to which they have been explicitly granted Viewer role or higher.
12. By default, smart content is enabled on new repositories. Once smart content is enabled on a repository, it can't be disabled. Smart content provides the following features:
    - Automatic image tagging, enabling users to search for images without having to manually tag them
    - Automatic video transcription, so users can view and search video subtitles
    - Image recommendations to content authors based on the content of their articles
13. If workflows are registered, click the **Workflows** tab to configure workflow settings.
    a. Click the **Workflows** box to select the workflows you want to use in this repository. These workflows will show in the assignments boxes on this page and to users when they create assets in this repository.
    b. In the **Workflow Assignments** section, select automatic and default workflows for the asset types associated with this repository, and specify whether default workflows are required.
        - **Any Asset Type**: Selections you make in this row will be propagated to all the asset types, but you can override the settings for individual asset types as desired.

- **Automatic Start**: If you want assets that are added this repository from a user's computer to be automatically submitted to a workflow when the asset is created, select a workflow in this column.

> **Note:**
>
> Assets added from Oracle Content Management or from third-party cloud storage providers currently don't support automatic workflow assignment.

- **Manual Start Default**: If you want assets in this repository to be manually submitted to a default workflow, select a workflow in this column, and select whether the workflow is **Required**.
  When a user views the Workflow panel for an asset for the first time, the default workflow will be selected. The user will only be able to change this workflow selection if the workflow *isn't* required. The user must click **Submit for Review** for the workflow to be initiated.

14. Click **Save** when done.

If you enabled the collection Viewer role, you must share the repository with anyone you want to be able to use it and the assets it stores.

Create a Digital Asset Repository

Digital asset repositories store digital assets (such as images, videos, and files) and content items (structured content such as blogs or press releases) that need to be published for use within digital experiences (websites and other channels) or translated into multiple languages. You must be a repository administrator to create and share asset repositories.

Digital asset repositories are different than business asset repositories. You should understand your options before you start creating repositories as these repositories have different purposes and different features.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you're limited to only one asset repository. To increase the number of repositories and take advantage of the full feature set, upgrade to the Premium Edition.

Digital Asset Repository Creation Overview

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

- Digital asset repositories allow you to publish and localize assets. If you need to just store your assets, not publish or translate them, create a business asset repository instead.
- Try to use meaningful names for the repository and add a clear description so users will know what content is stored there. After you share a repository, it appears in a user's asset list. Make sure a user understands where it's used.
- Don't use special characters when naming your repository.

- You can use channels, asset types, and taxonomies created by other administrative users. Channels and asset types don’t have to explicitly shared with you if you have an administrative role.
- Even if the repository is shared, some of the individual features within it are not.
  - Non-administrative users will be able to see all associated asset types in the filter pane on the asset page, and they can view and edit assets of those types without explicit sharing. To be able create a new asset, the user must have at least the contributor role on the repository.
  - Non-administrative users will be able to see all channels associated with a repository and they can target assets to those channels. But the channel must be shared with a user with a minimum of contributor rights in order to publish or unpublish assets to the channel.
  - Non-administrators will be able to categorize assets based on the taxonomies associated with a repository.
- If using video assets, consider enabling Video Plus, which provides a rich video asset experience that provides all standard video features plus advanced capabilities for optimized streaming, automatic transcoding and conversion.

Create a Digital Asset Repository

To create a digital asset repository:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Repositories** from the drop-down list, click **Create**, then select **Asset Repository**.
3. Enter a name for the repository. Don’t use special characters in the name.
4. Enter an optional description describing where the repository will be used.
5. Choose the asset types to be used with the repository.

> **Note:**
>
> You can't remove asset types that are associated with connectors selected for this repository.

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

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

8. Choose the default language for the repository.
9. If a channel was chosen, the required languages for that channel are shown. You can't edit the channel languages, but you can optionally add additional languages. The system

does not automatically translate an item when a language is chosen. You must either export assets, translate the strings, and import the translated strings; or add a translation to a particular content item.

10. Choose the translation connectors to be used with the repository. Translation connectors integrate third-party translation providers. Translation providers can be machine translation services or manual translation companies. By default, a translation connector by Lingotek is provided, but you must have a Lingotek account to configure and enable the connector.
11. Choose the content connectors to be used with the repository. Content connectors integrate third-party cloud storage providers. Only enabled connectors are available in the list. When you add content connectors, repository users will be able to add content from those third-party cloud storage providers. If there are asset types associated with the content connectors, they'll automatically be added to the list of asset types.
12. If you want users to be able to save assets with default or missing values in required fields, to be completed later, enable **Not Ready for Use Assets**. They must still complete all required fields before they can submit the asset for review or publication.
13. By default, if a user has access to a repository, they have implicit view access to all collections in that repository. If you want to be able to limit who can view a particular collection, enable **Collection Viewer Role**. When enabled, a Viewer role is available in collections, and users can only see collections to which they have been explicitly granted Viewer role or higher.
14. By default, smart content is enabled on new repositories. Once smart content is enabled on a repository, it can't be disabled. Smart content provides the following features:
    - Automatic image tagging, enabling users to search for images without having to manually tag them
    - Automatic video transcription, so users can view and search video subtitles
    - Image recommendations to content authors based on the content of their articles
15. If workflows are registered, click the **Workflows** tab to configure workflow settings.
    a. Click the **Workflows** box to select the workflows you want to use in this repository. These workflows will show in the assignments boxes on this page and to users when they create assets in this repository.
    b. In the **Workflow Assignments** section, select automatic and default workflows for the asset types associated with this repository, and specify whether default workflows are required.
        - **Any Asset Type**: Selections you make in this row will be propagated to all the asset types, but you can override the settings for individual asset types as desired.
        - **Automatic Start**: If you want assets that are added this repository from a user's computer to be automatically submitted to a workflow when the asset is created, select a workflow in this column.

> **Note:**
>
> Assets added from Oracle Content Management or from third-party cloud storage providers currently don't support automatic workflow assignment.

- **Manual Start Default**: If you want assets in this repository to be manually submitted to a default workflow, select a workflow in this column, and select whether the workflow is **Required**.
  When a user views the Workflow panel for an asset for the first time, the default workflow will be selected. The user will only be able to change this workflow selection if the workflow *isn't* required. The user must click **Submit for Review** for the workflow to be initiated.

16. Click **Save** when done.

If you enabled the collection Viewer role, you must share the repository with anyone you want to be able to use it and the assets it stores.

Share a Repository

Sharing a repository is similar to sharing a file or folder. You can share with individuals or with groups. However, you can also add custom editorial roles to use in the repository and refine access with granular permissions.

Even if the repository is shared, some of the individual features within it are not.

- Non-administrative users will be able to see all associated asset types in the filter pane on the asset page, and they can view and edit assets of those types without explicit sharing. To be able create a new asset, the user must have at least the contributor role on the repository, or an editorial role or granular permissions that grant them Create permission for the asset type.
- Non-administrators will be able to categorize assets based on the taxonomies associated with a repository.
- For digital asset repositories, non-administrative users will be able to see all channels associated with a repository and they can target assets to those channels. But the channel must be shared with a user with a minimum of contributor rights in order to publish or unpublish assets to the channel.

To share the repository, select it, click **Members**, and then perform any of the following tasks:

- Add Custom Roles to a Repository
- Add Members to a Repository
- Refine Permissions
- Save Custom Permissions as an Editorial Role
- View Membership and Permission History

Add Custom Roles to a Repository

To add a custom role to a repository:

1. Click the **Add Roles** tab.
2. Choose a role from the list.

You can see the permissions granted by the role by clicking . Permissions that don't apply to the repository (because the asset type or taxonomy isn't associated with the repository) are grayed out. To apply the disabled permissions, add the asset type or taxonomy to the repository.

3. Click **Add**.

Add Members to a Repository

To add a member to a repository:

1. If necessary, click the **Add Members** tab.
2. Enter part of the user or group name, display name, or email address, and then choose the user or group from the results.
3. Choose the role you want them to have.
4. Click **Add**.

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

Refine Permissions

When you add a member and choose an out-of-the-box role, they're given the selected access to all asset types and taxonomies added to the repository. When you choose a custom role, they're given the access specified in the role definition. Either way, you can refine access through granular permissions.

> **Note:**
>
> You can't refine the repository owner's permissions or the permissions of a manager.

To view detailed permissions for a member, click next to the member's avatar.

To change or refine member permissions:

1. If necessary, click the **Add Members** tab.
2. Click next to the member whose permissions you want to change.
3. Select the assets types and taxonomy categories for which you want to refine permissions:
   - To refine access to specific asset types, in the Assets column click **Add**, select asset types, then click **Save**.
     You can add up to 50 asset type rules.
   - To refine access to specific taxonomy categories, in the Taxonomies column click **Add**, select a taxonomy and categories, then click **Save**.
     You can add up to 30 taxonomy category rules.
4. Select the appropriate permissions for each asset type and category.
   If you selected a site security taxonomy (used to manage sites in a shared repository) and a non-site category, you can also assign the **Create Site**

permission. Users with the Create Site permission can create SST sites in the repository under the selected category.

5. When you're done refining access, click **Save**, then click **Done**.

Save Custom Permissions as an Editorial Role

After refining permissions, you can save the permission set as an editorial role.

To save custom permissions as an editorial role:

1. If necessary, click the **Add Members** tab.
2. Next to the custom permission set you want to save as an editorial role, click .
3. Enter a name and, optionally, a description for the editorial role.
4. Click **Save**.
   The new editorial role is saved, added to the repository, and applied to the user or group.

View Membership and Permission History

To view the history of membership and permission changes for the repository, click .

This pane is divided into tabs:

- **General**—displays the repository name, repository description, when the repository was created, and when it was last updated.
- **Activity**—details specific activities such as changes in repository membership; changes in user or group editorial permissions; and changes in asset types, taxonomies, or taxonomy categories that impact permissions granted to users in the asset repository.

Granular Permissions

You can grant users permissions to assets and taxonomies by assigning roles in the repository, but you can further refine access through *granular permissions* applied according to asset type and taxonomy category.

> **Note:**
>
> - Legacy repositories (created before February 2021) don't support granular permissions. You must convert your repository to take advantage of this feature.
> - You can't refine the permissions of the repository owner or members assigned the Manager role.

This topic covers the following information:

- Permissions Granted with Repository Roles
- Permissions Granted with Site Roles
- Task Permissions Granted with Repository Roles
- Custom Editorial Roles

- Granular Permissions
- Default Granular Permissions
- Parent and Child Category Granular Permissions
- User and Group Granular Permissions
- Granular Permissions Needed for Tasks
- Use Case Example for Taxonomy Category Granular Permissions

Permissions Granted with Repository Roles

When you add a member to the repository and assign them a role, the following asset permissions are selected for "Any Type".

Role	View	Update	Create	Delete
Viewer	✓			
Contributor	✓	✓	✓	✓
Manager	✓	✓	✓	✓

When you add a member to the repository and assign them a role, the following taxonomy permissions are selected for "Any category".

Role	View	Categorize	Create Site
Viewer	✓		
Contributor	✓	✓	✓ *
Manager	✓	✓	✓ *

* The Create Site permission granted to repository contributors and managers allows them to create a site in any non-site category available in the repository, assuming they have an application role that allows them to create sites and they have access to site templates.

Permissions Granted with Site Roles

For sites that *don't* use site security taxonomies, anyone added as a member of the site is added to the repository as a viewer.

For sites that *do* use site security taxonomies (SST sites), when someone is added as a member of the site, they're automatically added to one of the site content groups based on the role they're assigned. A person given the viewer or downloader role is assigned to the site content viewer group. A person given the manager or contributor role is assigned to the site content contributor group. These groups provide the following asset permissions for "Any Type".

Role	View	Update	Create	Delete
Viewer or Downloader	✓			
Contributor or Manager	✓	✓	✓	✓

When you add a member to the site and assign them a role, the following taxonomy permissions are selected for the site category.

Role	View	Categorize	Create Site
Viewer or Downloader	✓		
Contributor or Manager	✓	✓	

Task Permissions Granted with Repository Roles

When you add a member to the repository and assign them a role, they can perform the following tasks.

Task	Viewer	Contributor	Manager
View the repository and all the assets	✓	✓	✓
Submit assets for review in workflow	✓	✓	✓
Move assets through workflow * You need at least Viewer access to the repository, plus any required workflow role.	✓ *	✓ *	✓ *
Create or upload assets * You need at least Contributor access to the repository to create the asset, and the asset type must be associated with the repository.		✓ *	✓ *
Edit assets (including associating categories, tags, collections, properties, uploading new versions of digital assets, and, for digital asset repositories, channels)		✓	✓
Delete assets		✓	✓
Change repository membership, roles, and granular permissions			✓

Task	Viewer	Contributor	Manager
Edit the repository (including associating asset types, taxonomies, languages, content connectors, workflows, and, for digital asset repositories, publishing channels, and translation connectors)			✓
Publish assets (digital asset repositories only) * You need at least Viewer access to the repository, plus at least Contributor access to the publishing channel used to publish the asset	✓ *	✓ *	✓ *
Create sites Repository contributors and managers can create standard or SST sites in the repository. Users with the appropriate granular permission can create SST sites in the repository.		✓	✓

Custom Editorial Roles

Create custom editorial roles to easily assign granular permission sets that you can apply to multiple repositories. Additionally, if you need to change the permission set, you can edit the role and the changes will apply to all repositories that use the editorial role.

Granular Permissions

For members assigned Viewer or Contributor roles, you can further refine permissions according to asset types and taxonomy categories. After you refine permissions, their role is listed as Custom. You can also save the refined granular permissions set as an editorial role.

Asset type permissions are treated as one permission group, while taxonomy category permissions are treated as another. Within each permission group, the permissions are treated as if there is an "or" between them. For example, a user might have asset type permissions that allow them to view assets of asset type "Article" *or* edit assets of asset type "Press Release" *or* view assets of asset type "Author Image". If you add taxonomy category permissions to that, each permission group is treated separately, as if there is an "and" between the two groups. That means the user has access to assets that are one of the selected asset types *and* have been categorized with one of the selected categories or are uncategorized. Continuing with our example user, if we add taxonomy category permissions, the user would be able to access assets of the selected asset types only if they were also (there's the "and" between the two groups) categorized with the category "Fiesta" *or* (there's the "or" within the same group) the category "Mustang" *or* if they were uncategorized.

> **Note:**
>
> - You can add up to 50 asset type rules and up to 30 taxonomy category rules to a single permission set.
> - In the Categories tab of the asset filter panel, users see a list of all categories associated with any asset they have access to. This means they might see the name of a category to which they don't have access, but they won't be able to see assets assigned with *just* this category.

Taxonomy category permissions also include a **Create Site** permission for site security taxonomies. You can select this permission when you add a non-site category from a site security taxonomy. Users with a custom role that includes the Create Site permission can create SST sites in the repository under the selected category.

Default Granular Permissions

The permissions you apply to **Any Type** in the Assets section or **Any Category** in the Taxonomies section are the default permissions for that user or group. You can override those permissions with the permissions specified for selected asset types and selected categories.

Parent and Child Category Granular Permissions

The permissions you apply to a category also apply to all its child categories. You can *expand* the permission granted on a parent category in a child category, but you can't *restrict* the permission granted on a parent category in a child category. For example, if you grant View access to the parent category "Product Line 1", you can grant View access to the child category "Product A" and add Categorize access; but if you grant View and Categorize access to "Product Line 1", you can't remove the Categorize access to "Product A".

User and Group Granular Permissions

If a user is given refined access as both as an individual user and as part of a group, the user is granted cumulative access to all assets specified in those permissions. If different levels of access are granted to the individual user and the user as part of a group, the user gets the highest level of access available to them.

Granular Permissions Needed for Tasks

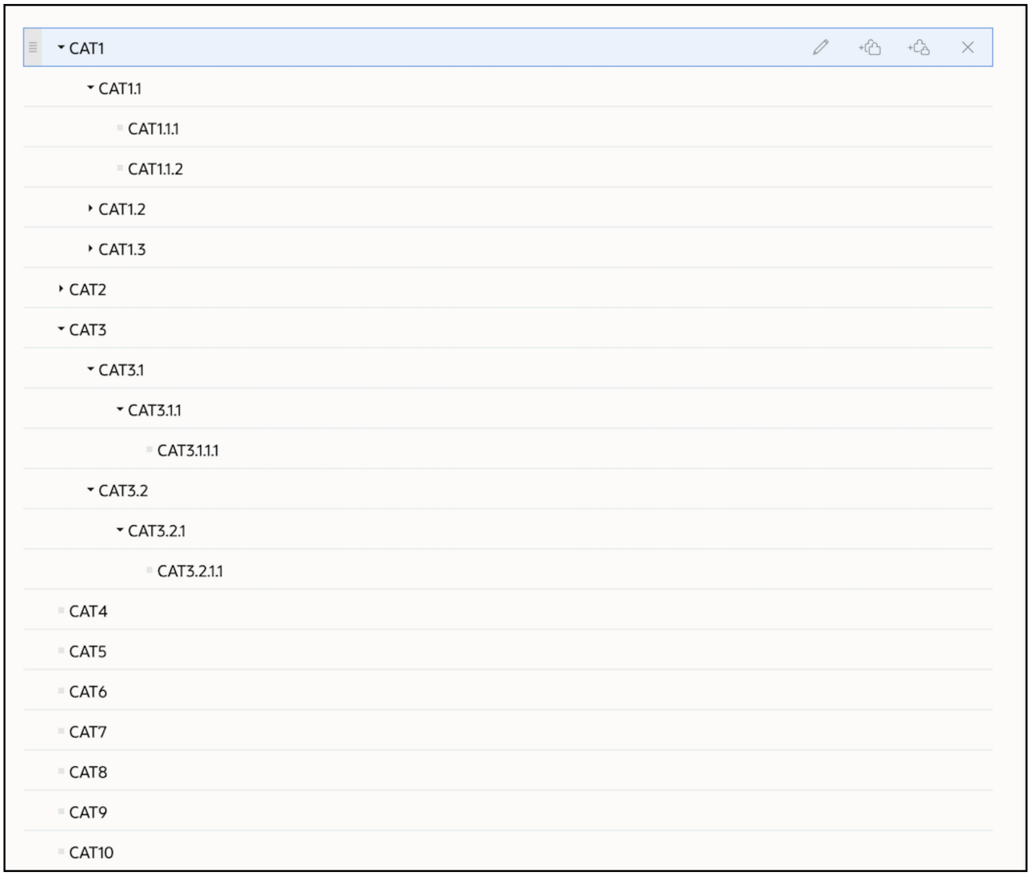
Here are some common tasks and the granular permissions needed to perform them:

- To see an asset, the asset needs to be uncategorized, or you need View permission on at least one category that asset has been assigned to.
- To add a referenced asset to another asset, you need Update permission on the parent asset and View permission on the child asset.
- When viewing an asset with referenced items, you need View permission on the parent asset to see the parent asset, and, if you want to see the referenced items, you also need View permission on the referenced assets, otherwise you'll just see "Insufficient permissions".
- To add an asset to a category, you need Update permission on the asset type and Categorize permission on the category.

- To create a site, you need Create Site permission on the parent category (any non-site category) in a site security taxonomy.

Use Case Example for Taxonomy Category Granular Permissions

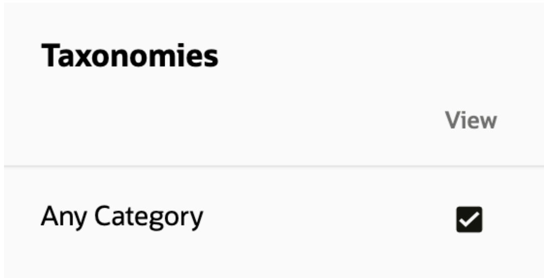
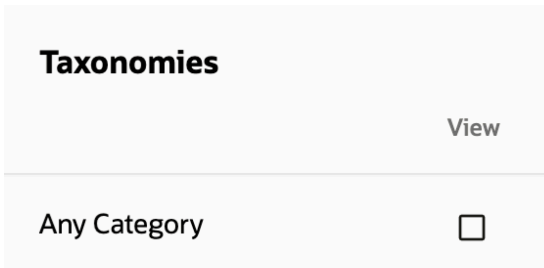
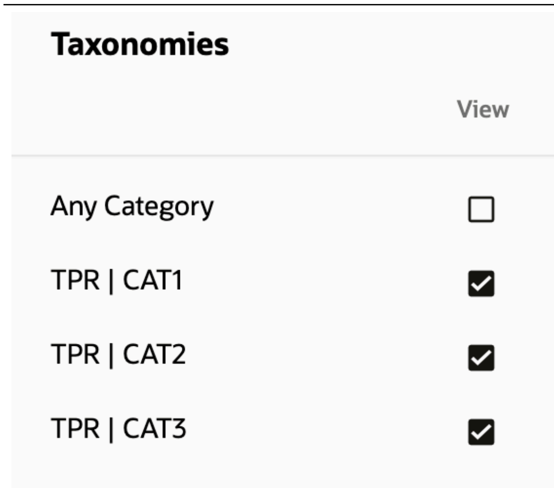
The following is an example of how granular permissions are applied based on the following taxonomy.

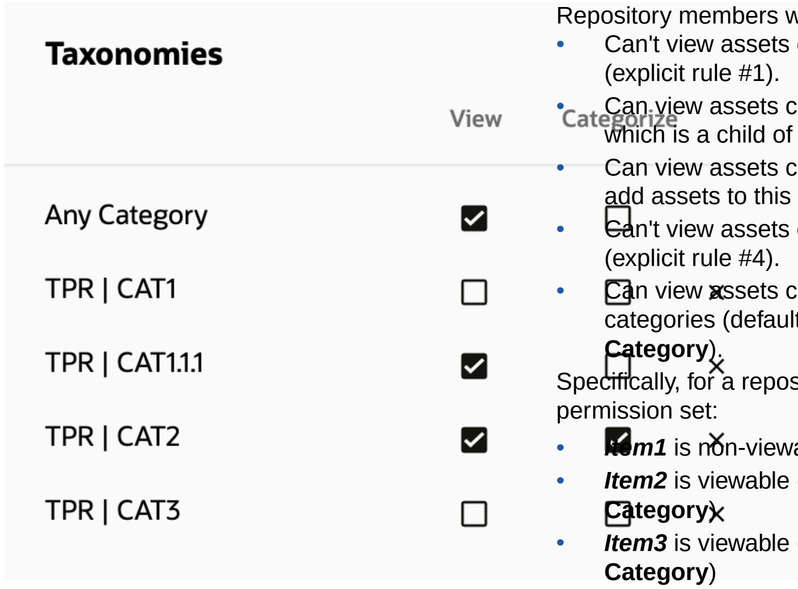


Assets in the repository are categorized as follows:

- ***Item1*** is added to **CAT1**
- ***Item2*** is added to **CAT2** and **CAT4**
- ***Item3*** is added to **CAT4**
- ***Item4*** is added to **CAT1.1.1**
- ***Item5*** is added to **CAT1** and **CAT1.1.1**
- ***Item6*** is added to **CAT1** and **CAT2**
- ***Item7*** is added to **CAT1.1.1** and **CAT3**
- ***Item8*** is added to **CAT3** and **CAT4**

The following table shows examples of how different permissions would affect access to particular assets in the repository.

Selected Permissions	Access Granted in the Repository
 	Repository members with this permission set: • Can view any categorized asset and add assets to any category in any taxonomy assigned to the repository (default rule applied to **Any Category**). • Can view non-categorized assets. **Note:** This permission set is granted by the *Contributor* or *Manager* role.
 	Repository members with this permission set: • Can't view any categorized asset or add assets to any category in any taxonomy assigned to repository (default rule applied to **Any Category**). • Can view non-categorized assets.
 	Repository members with this permission set: • Can view assets categorized with "CAT1" or its children "CAT1.1", "CAT1.1.1", and so on and add assets to these categories (explicit rule #1). • Can view assets categorized with "CAT2" (explicit rule #2) or "CAT3" (explicit rule #3). • Can't view assets categorized with other categories (default rule applied to **Any Category**). Specifically, for a repository member with this permission set: • ***Item1*** is viewable (explicit rule #1) • ***Item2*** is viewable (explicit rule #2) • ***Item3*** is non-viewable (default rule applied to **Any Category**)

Selected Permissions	Access Granted in the Repository
 	Repository members with this permission set: • Can't view assets categorized with "CAT1" (explicit rule #1). • Can view assets categorized with "CAT1.1.1" which is a child of "CAT1" (explicit rule #2). • Can view assets categorized with "CAT2" and add assets to this category (explicit rule #3). • Can't view assets categorized with "CAT3" (explicit rule #4). • Can view assets categorized with other categories (default rule applied to **Any Category**). Specifically, for a repository member with this permission set: • ***Item1*** is non-viewable (explicit rule #1) • ***Item2*** is viewable (default rule applied to **Any Category**) • ***Item3*** is viewable (default rule applied to **Any Category**) • ***Item4*** is viewable (explicit rule #2) • ***Item5*** is viewable (explicit rule #2) • ***Item6*** is non-viewable (explicit rule #1) • ***Item7*** is non-viewable (explicit rule #4) • ***Item8*** is non-viewable (explicit rule #4)

Copy Assets from One Repository to Another

If you manage more than one repository, you can bulk copy assets from a collection in one repository you manage to another.

1. On the **Repositories** page, select the source repository (the repository you want to copy assets from), and then click **Copy Assets**.
2. Choose to copy **All assets**, **Assets in a collection**, or **Assets targeted to a channel**. If necessary, select the collection or channel.
3. Select the target repository (the repository you want to copy assets to).
4. Click **Copy**.

The selected assets from the source repository will be copied to the target repository.

For assets in digital asset repositories or business asset repositories the following factors apply:

- For content items, all dependencies will be copied.
- If an asset's asset type isn't associated with the target repository, the asset type will automatically be added to the target repository.

For assets in digital asset repositories these additional factors apply:

- For digital assets, all renditions will be copied.
- For content items, all translations will be copied.

- For assets that are targeted to a channel, the new copies will be associated with the selected channel.
- Even if an asset was published in the source repository, it won't be published in the target repository.

Export and Import Repositories

In the Oracle Content Management (OCM) web interface, you can export and import repository content.

Export a Repository

1. On the **Repositories** page, select the source repository (the repository you want to export), and then click **Export Content**.
2. In the Export Content section, provide a name for the export job that will be created, select the destination folder (or create a new one using the **Create** button), select a scope of assets to include into the export archive file, specify if you want to export only assets modified since a specific date, and other export options (whether to include custom components, taxonomies, collections, and channels).
3. Click **Export**.
   An export job is created.

   Once an export job is successful, you can download the archive files from the specified destination folder (which is the new job folder that was created for the export job).

To view all the export jobs that were created:

1. Click **View Jobs** and then select **Export Jobs**. All the export jobs are listed along with various options.
2. Click an export job to view the details about the job. You can also search a specific export job, sort the list of export jobs, download an export job, and so on. You can also view the status of an export job on the Export Jobs page.

Import a Repository

1. On the **Repositories** page, select the destination repository (the repository you want to import into), click **Import Content** and then choose **Import from Archive**.
2. In the Import Content section, in the Pick an Archive subsection, choose the folder that contains the export archive files and click **Next**.

   > **Note:**
   >
   > You can also upload export archive files created on another OCM instance to an existing folder or click **Create** in the upper right corner of this section to add a folder first.

3. In the Configure Import subsection, provide a name for the import job that will be created, specify whether to import assets, asset import options, other import options (such as indicating whether to merge channel targeting, update collection assignments, update taxonomy categorization, and import asset types/channels/collections/taxonomies/custom components), and prefix for friendly URL values.

> **Note:**
>
> **Asset Import Options** are:
>
> - **Update Assets from Archive** — This option adds the new assets and updates existing assets in the selected repository.
> - **Duplicate Assets from Archive** — This option adds the new assets and duplicates existing assets in the selected repository.

You can also optionally enable **Ignore all warnings and accept changes**.

> **Note:**
>
> If you enable this option, the import job will complete regardless of any warnings. Once the job has completed, you can open the **Report** tab of the job details panel to review any issues and download the report. If you leave this option disabled, the job will pause each time it encounters a problem and you will need to manually assess the validation and resume the job.

4. Click **Import**.
   An import job is created.

To view all the import jobs that were created:

1. Click **View Jobs** and then select **Import Jobs**. All the import jobs are listed along with various options.
2. Click an import job to view the details about the job. You can also search a specific import job, sort the list of import jobs, download an import job, and so on. You can also view the status of an import job on the Import Jobs page.
   If an import job's status indicates that it has partially succeeded, you can retry (resubmit) the job in the Import Jobs page.

   In the import job details, the **Report** tab shows a report about any issues that were encountered during the import. You can download the report too from this tab.

   To resume a paused job:

   a. In the job list, click the pending job you need to review to open the job details panel.
   b. Click the **Report** tab to review the validation summary report. You may need to select the report section to find the issue you need to review.
   c. Expand the issue to see why the import has paused. If the reason is acceptable, click **Resume Import**.

Import Assets

You can publish content from Oracle WebCenter Sites to Oracle Content Management so that it can be distributed across other channels thereby fostering content reuse and consistent messaging.

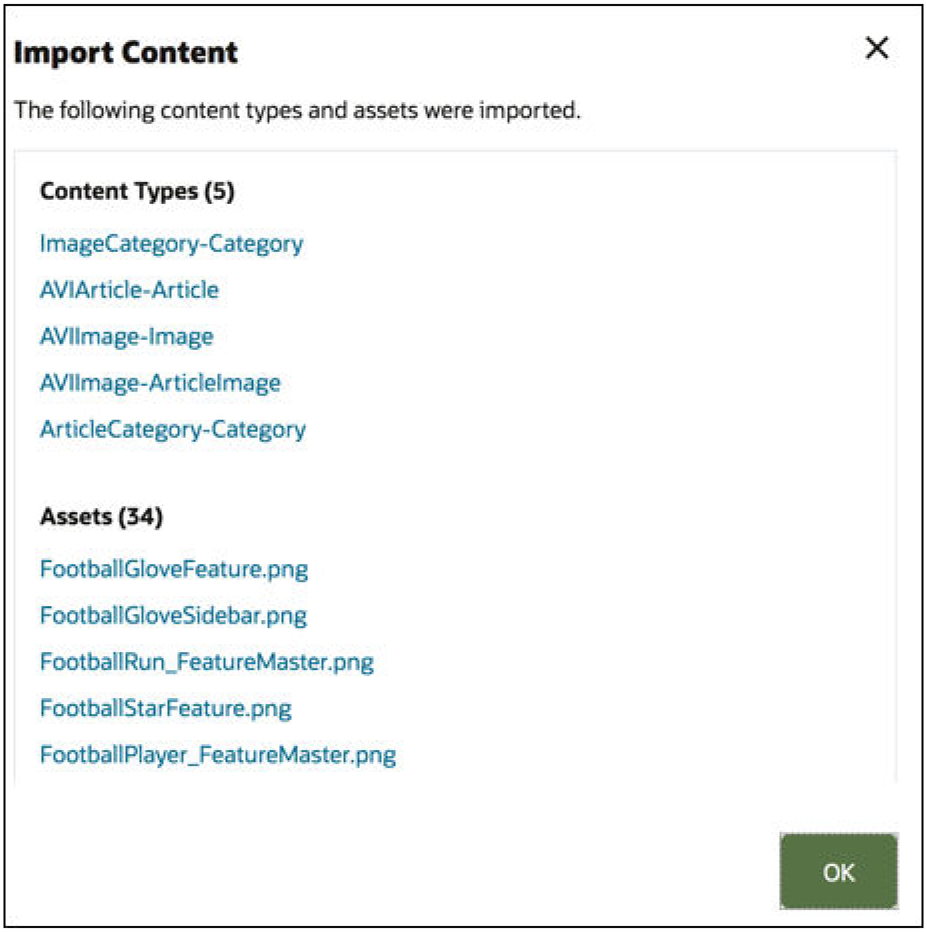
This topic describes one step (importing assets) in the process. For the full process, see Publishing Content from WebCenter Sites to Oracle Content and Experience in *Administering Oracle WebCenter Sites*.

Importing the Oracle WebCenter Sites published assets to Oracle Content Management involves two steps:

- Upload the zip file to Oracle Content Management.
- Import the published asset into your repository.

To import published assets:

1. Sign in as a repository administrator in your browser.
2. If necessary, create a new repository into which to import your content from WebCenter Sites You can alternatively use an existing repository.
3. Select the repository into which you want to import your content, click **Import Content** and then choose **Import from WC Sites**.
4. Upload your imported content.
    a. Open a folder into which to upload your zip file. To create a new folder, click **Create**, select **Folder**, add a name and description, and click **Create**.
    b. Click **Upload**, and select the WebCenter Sites mapping (zip) file from your computer.
5. Select your zip file, and click **OK**.
6. On the Import Content screen, select **Update existing assets by adding new version**, and click **Import**.
   When the import is successful, a message "Successfully Imported Content Package <filename>.zip" will be displayed.
7. Click **Details** to view the summary page (shown below), generated once mappings are uploaded into your repository. Click an item to view it.



View Repository Properties

The repository properties show when the repository was created and last updated and the API information. You can also view or edit the name and description.

To view the properties, open the repository, then click .

Property information is divided into tabs:

- **General** – displays the name, description, when the repository was created, and when it was last updated. You can edit the name or description, and then click **Save** to save your changes.
- **API** – displays the repository's ID. To copy the ID to the clipboard, click next to it.

You can also view the history of membership and permission changes for the repository while viewing the repository members. From the Repositories page, select the repository, click **Members**, then click .

Integrate Translation Connectors

Oracle Content Management can integrate translation connectors by third-party translation providers for machine translation or manual translation services.

Note:

- If you're using Oracle Content Management Starter Edition, translation connectors aren't supported. To take advantage of the full feature set, upgrade to the Premium Edition.
- Translation connectors aren't used in business asset repositories.

Translation connectors must be created, configured and enabled by an administrator before being made available. By default, a translation connector by Lingotek is available, but you must have a Lingotek account to configure and enable it. To see a list of available translation connectors, click **Integrations** in the administration area of the side menu and select **Translation Connectors** from the page menu.

Creating, Configuring and Enabling a Translation Connector

Before a translation connector can be enabled, the connector must be configured with the proper account information required by the translation service. By default, Lingotek is available as a translation connector, but you will need to have a Lingotek account to configure and enable it. Oracle Content Management provides a link to request a trial account from Lingotek.

1. Click **Integrations** in the administration area of the side menu and select **Translation Connectors** from the page menu.
2. Click **Create** to make a new connector, or select the translation connector you want to configure and click **Edit**.
3. Enter the information required by the translation service. For example, the Lingotek connector has an **Additional Fields** tab that requires a bearer token and workflow profile, both provided by Lingotek.
4. Optionally, select any additional data fields that may be available from the translation service that you want added to every document in the translation job. For example, Lingotek allows a given set of metadata, like due dates and purchase order, to be specified in each document in the translation set.
5. Once the translation connector is configured, click **Save** to return to the Integrations page and click **Enable**.
6. Add the connector to a repository.

Republish HTML Renditions of Assets

> **Note:**
>
> This feature isn't available in business asset repositories.

If there are asset types in your repository that support publishing HTML renditions, you can easily republish the HTML renditions for all *published* assets of a particular asset type.

1. On the **Repositories** page, select the repository that contains the assets you want to recompile, and then click **Publish HTML**.
2. Select the asset type for which you want to republish HTML renditions, and then click **OK**.

Oracle Content Management creates new HTML renditions for all published assets of the selected type in this repository.

You can view the history of all publishing jobs on the Publishing Event Logs page.

Give a Site Access to Multiple Repositories

> **Note:**
>
> This feature isn't available in business asset repositories.

If you want to give a site access to a repository in addition to it's default repository, you can add the site's publishing channel to the additional repository.

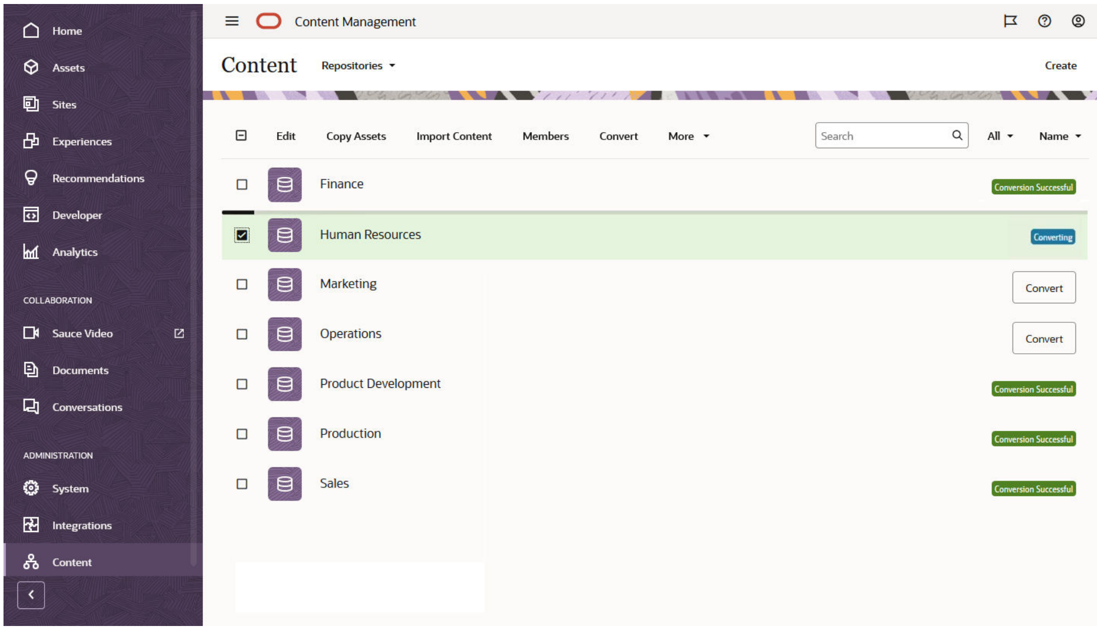
1. On the **Repositories** page, open the repository you want the site to able to access.
2. Under **Publishing Channels**, select the site's publishing channel.
3. Click **Save**.

> **Note:**
>
> When you share a site associated with multiple repositories, only the default repository is shared. You'll need to share any additional repositories as necessary.

Convert a Legacy Repository to Support Digital Asset Types

Repositories created before February 2021 don't support digital asset types. To take advantage of digital asset types, you'll need to convert those legacy repositories and the digital assets in them.

You can see which repositories need to be converted on the **Repositories** page. Repositories that haven't been converted display a **Convert** button in the right column. Repositories that have already been converted display a message in the right column indicating whether the conversion was successful; this message will disappear after 14 days. Repositories with a **Conversion Successful** message or with nothing in the right column support digital asset types.



When you convert a repository, each digital asset in the repository will be converted to use one of the seeded digital asset types (Image, Video, Video Plus, or File) and will be saved as a new version. During conversion, users won't be able to use the repository. Depending on the number of digital assets in your repository, conversion may be a lengthy process. You'll see a progress bar above the repository indicating the progress of the conversion, and the message in the right column will say **Converting**. After conversion, you may need to republish the assets in the repository.

> **Note:**
>
> Conversion can't be undone.

To convert a legacy repository to support digital asset types:

1. On the **Repositories** page, click **Convert** next to the repository you want to convert. You can alternatively, select the repository or right-click the repository, and then click **Convert**.
2. After conversion completes successfully, republish assets as necessary.

To view details of a repository conversion, select or right-click the repository, and then click **Conversion Report**. You'll see the status, date, and time of the conversion, and you can download a detailed conversion report. The downloaded report is a JSON file that shows entries for each digital asset, including the asset ID, asset name, and the digital asset type applied to the asset.

Note:

Access to the conversion report disappears after 14 days, like the conversion status message.

23 Manage Asset Types

Asset types define the data structure and type of data that an asset can store as well as the relationship the asset can have with other assets in the repository. In order for your users to create content items or upload digital asset or business documents to a repository, you must create the appropriate asset types, and then associate them with the repository. You must be a content administrator to create asset types.

In Oracle Content Management asset types are divided into the following two families:

- **Content types** define groups of data fields of various data types (such as, text type for storing string values, long text type for storing rich-text values, date type for storing date and time values, and reference type for storing references to other assets). For example, you might create a blog article content type, where each asset stores values for title, body, date created, and a list of references to related articles. When you create an asset from a content type, it's called a *content item*.
- **Digital asset types** define which file media types (MIME types) assets of that type can store and groups of attributes of various data types to describe the file. For example, you might create a photo digital asset type, including only image/jpeg and image/png file types and attributes for the copyright and a caption. Oracle Content Management includes several out-of-the-box digital asset types—Image, Video, Video Plus (digital asset repositories only), and File. When you create an asset from a digital asset type, it's called a *digital asset* or a *business document*.

By default the **Asset Types** page shows all asset types, sorted by name. Use the drop-down menus on the right to filter by asset type and to change the sort order. You can also use the search box to find an asset type by name.

> **Note:**
>
> If you're using Oracle Content Management Starter Edition, you have limited asset type support:
>
> - Includes out-of-the-box asset types for images, videos, and files
> - Only 5 custom asset types
>
> To increase the number of assets and take advantage of the full feature set, upgrade to the Premium Edition.

To create asset types you must be a content administrator. After you create an asset type, a repository administrator must associate it with at least one repository so it can be used to create assets in that repository. Repository members with the Manager or Contributor role can create assets from any asset types assigned to the repository.

You can manage asset types in the following ways:

- Create a Content Type
- Create a Digital Asset Type

- Associate an Asset Type with a Repository
- Edit an Asset Type
- Copy an Asset Type
- Share an Asset Type
- Delete an Asset Type
- View Asset Type Properties

Create a Content Type

A *content type* is a framework used to specify what information is included in a content item. You must be a content administrator to create content types and share them with others.

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Asset Types** from the drop-down menu.
3. To create a new content type, click **Create**, then select **Content Type**.
4. Enter a name for your content type.
5. Edit the display name as needed. The display name is used in the user interface, for example, on the Assets page.
6. Optionally, add a description to help users understand what this content type is used for.
7. Click **Create**.
8. Drag a data field into the content type definition.
9. The settings page for the data field opens:
   - Enter a display name and optional description for your data field.
   - Optionally, edit the field name. This name must be unique.
   - If you selected text, media, or reference, select whether the field allows only a single value or multiple values and the number of values allowed.
   - Select if the field is required before the asset can be used.
   - If you selected text, large text, or embedded content, optionally provide a comment or note that provides additional instructions for the translator.

   If this content type will be used in digital asset repositories, configure these additional settings:

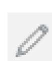
   - If you selected media or reference, select whether the dependent asset is always published with the parent asset or only when the dependent asset isn't already published.
   - Select if the field values should be inherited from the master type. For example, you may want a text field to display the company name or stock symbol as entered when a content item is created using this content type across all languages. Or you may want to prepopulate an image field to always use the approved company logo for all languages.

Note:

When selecting **Inherit from master**, **Do not translate** is automatically selected. If editing a content type that has been used to create content items of different languages already, selecting **Inherit from master** causes the field values in the existing draft items to use the value in the master item. If the languages have already been published, then the preexisting value will remain in use until a new draft item of that language is published.

- If you selected text, large text, or embedded content, select whether or not to translate the data entered into the fields. For example, a product description may be translated, but the product name or brand name might only be valid in the original language.

10. On the appearance page for the data field, set what your data field will look like and if you want to apply any kind of validation. Each data field has different appearance values, such as validation, minimum or maximum length, the type of text editor to use (text area, rich-text editor, or markdown editor), or if the data needs to follow a particular pattern, such as a valid email address or zip code. For details on the available out-of-the-box data fields and their options, see Data Fields. You can also develop custom field editors. When you add a large text field and set the appearance to rich-text editor or markdown editor, you can select the type of toolbar: standard, basic, or custom. For the custom markdown editor, you select which buttons to include in the toolbar. For custom rich-text editor, see Customize the Rich-Text Editor Toolbar.

11. You can group related fields to make it easier for contributors to work with content item forms.
    - To create a group, click **Add Group**, and then name the grouping. Drag data fields to the groups as desired.
    - Select whether you want the group to be expanded by default, collapsed by default, or hidden when viewed in the content item editor. For example, you might have mandatory fields that are in a group that is expanded by default and optional fields that are in a group that are collapsed by default, or you might need to edit a content type at some point to hide a group of fields that have become obsolete.
    - To edit a group name, click .
    - To delete a group, click . Select whether you want to remove the data fields along with the group, or if you want to move the data fields to another group.

12. On the **Friendly URL** tab, you can enable a readable URL for content items created using this content type. This readable URL can be used as the slug value in calls to the REST API for Content Delivery.
    a. Select **Enable friendly item name for URL** to enable friendly URLs.
    b. If you're going to provide a custom prefix for the friendly URL and you want to include forward slashes in the prefix to create virtual path segments in the URL when items are displayed on the Detail page, select **Allow forward slash**.
    c. If you want to provide a custom prefix for the friendly URL, choose **Provide custom prefix for item name** from the drop-down list, and then enter your prefix in the text box.

Content items created from this content type will have a friendly URL in the format <custom-prefix>-<content-item-name>. For example, if you enter marketing/blogs as the prefix and Fall 2023 is the name of the content item, the friendly URL would be http://www.example.com/../../marketing/blogs-fall-2023.

> **Note:**
>
> - The prefix can't contain any of the following characters: " # % & : ; < > = ? @ [ ] \ ^ ` { } | ~ and / (unless you select to allow forward slash)
>   If you allow forward slashes in your friendly URL, you must URL-encode the slashes when making an API call or the call will fail.
> - Spaces in the prefix and in the content item name are replaced with hyphens (-) in the friendly URL.
> - The friendly URL will be all lower-case.
> - You don't need to include a forward slash before or after your prefix. The forward slash before your prefix will be included automatically in the friendly URL. A hyphen (-) will be added between your prefix and the content item name.
> - Friendly URLs aren't created for items in business asset repositories, only items in digital asset repositories.

13. On the **Content Layout** tab for the content type, select the layouts, editor, and preview formats you want to be available for this content type. When a content item is created using this content type, the person creating the content item will use the form you choose to enter the data for the content item and can preview how the content item will appear using any of the chosen layouts.
    - **Site Builder layouts:** (for use in digital asset repositories only) Choose desktop and mobile layouts for each layout style used in Site Builder. If the content item created using this type will be used on a website, the layouts should be created and uploaded prior to creating the content type.
    - **Custom and precompiled layouts:** (for use in digital asset repositories only) Add custom layout styles that can be published through the API and optionally used to publish HTML renditions for the published assets. See Manage Custom Components and Layouts.
      a. Click **Add Layout Style**.
      b. Enter a style name.
      c. An API name is automatically generated, but you can edit it as desired. The API name must be unique.
      d. Select desktop and mobile layouts.
      e. If you want to publish HTML renditions of the content in this layout when the asset is published, select **Publish HTML**. When the asset is published an HTML rendition of the asset will be created automatically. Repository administrators can also manually republish HTML renditions for all published assets of this asset type.

- **Default preview layout:** Choose the layout to be used by default to view and preview content items of this content type in the web client.
  If you want asset users to preview these content items in a site page layout by default, you must first select the site page as described below and save the asset type. Then you can edit the asset type, return to the Content Layout tab, and the selected site page will appear in the default preview layout drop-down list.
- **Content item editor form:** Choose the form to be used as the content item editor when adding or editing data for content items of this content type.
- **In-place and external site previews:** (for use in digital asset repositories only) If you want the content item creator to be able to see what the content item will look like on a particular site page, select the Oracle Content Management-created site and page, or enter an external site and page URL. External URLs can include placeholders for `id`, `type`, `language`, and `slug`. For example, `http://www.example.com/mypage/{id}/{type}/{language}/{slug}` or `http://www.example.com/mypage?id={id}&lang={language}&type={type}&slug=(slug).`

14. On the **Tile View** tab for the content type, you can specify a custom tile view. Custom tile views let you configure how the data fields of content items are displayed on the Assets page, based on content type.
    - Under the **Display** area, select an option. In the available options, media data fields are represented by gray rectangles, title data fields are shown as thick gray bars, and text data fields are shown as thin gray bars.
    - Under the **Configuration** area, select the content type fields to be used for each piece of data shown in the tile view (title, text, media).
    - If you selected a tile view that includes a thumbnail, you can select **Contain Media Thumbnail** to scale the thumbnail so that the entire thumbnail is shown in the media area. Otherwise the thumbnail will be zoomed and cropped to fill the media area.
15. For content types that will be used in digital asset repositories, control translation of standard data fields on assets of this type. By default, name and description data fields are translatable and will be included in the translation package when the asset is translated. On the **General** tab for the content type, configure the following settings:
    - If you don't want one of these fields to be translated, enable **Do not translate**, and the field value won't be sent in the translation package.
    - If you want all languages to use the value that is set in the master language for the asset, enable **Inherit from master**.

To view the content type's properties, click .

You must associate the content type with at least one repository and grant users at least the contributor role on the repository so the content type can be used to create content items.

Create a Digital Asset Type

A *digital asset type* defines the file media types that a digital asset or business document can store and the structure of attributes (metadata) to describe the asset. You must be a content administrator to create digital asset types and share them with others.

Oracle Content Management includes several digital asset types out-of-the-box with predefined groups of media types:

- **Image**—this asset type supports all known to Oracle Content Management media types for images. You can use it out-of-the-box for managing image files in repositories.
- **Video**—this asset type supports all known to Oracle Content Management media types for videos. You can use it out-of-the-box for managing video files in repositories.
- **Video Plus** (for use in digital asset repositories only)—this asset type supports the same file media types as Video type, but it is designed to support managing advanced videos. Video Plus isn't supported in business asset repositories.
- **File**—this asset type allows managing any file other than images or videos. Note that you can preview only supported file formats.

You can restrict custom digital asset types to support only specific file media types and add custom attributes as required for managing digital assets in your organization.

You can copy an existing asset type or create a new one. For example, you can copy the seeded Image type to create a custom asset type that extends the asset type with attributes.

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Asset Types** from the drop-down menu.
3. To create a new digital asset type, click **Create**, then select **Digital Asset Type**.
4. Enter a name for your asset type.
5. Edit the display name as needed. The display name is used in the user interface, for example, on the Assets page.
6. Optionally, add a description to help users understand what this asset type is used for.
7. Click **Create**.
8. On the **Media Types** tab, select the media types you want to support for this digital asset type. Search for and select an extension, and then click **Add**. If you don't see the extension you want, you can add it, but don't include the "." (for example, "jpg", not ".jpg"). Note that you can preview only supported file formats.
   If you select one or more video types that support Video Plus, you can enable Video Plus. Video Plus supports advanced video capabilities, including optimized streaming, automatic transcoding, conversion, and video editing. Video Plus isn't supported in business asset repositories.
9. Click the **Definition** tab. The data fields you add here will appear in the Attributes pane when adding or viewing the asset.
   a. Drag a data field into the digital asset type definition.
   b. The settings page for the data field opens:
      - Enter a display name and optional description for your data field.
      - Optionally, edit the field name. This name must be unique.
      - If you selected text, media, or reference, select whether the field allows only a single value or multiple values and the number of values allowed.
      - Select if the field is required before the asset can be used.

- If you selected text, large text, or embedded content, optionally provide a comment or note that provides additional instructions for the translator.

If this asset type will be used in digital asset repositories, configure these additional settings:

- If you selected media or reference, select whether the dependent asset is always published with the parent asset or only when the dependent asset isn't already published.
- Select if the field values should be inherited from the master type. For example, you may want a text field to display the company name or stock symbol as entered when a digital asset is created using this asset type across all languages. Or you may want to prepopulate an image field to always use the the approved company logo for all languages. If you want the field to be translatable, you must disable **Inherit from master** and **Do not translate**.

> **Note:**
>
> When selecting **Inherit from master**, **Do not translate** is automatically selected. If editing an asset type that has been used to create assets of different languages already, selecting **Inherit from master** causes the field values in the existing draft items to use the value in the master item. If the languages have already been published, then the preexisting value will remain in use until a new draft item of that language is published.

- If you selected text, large text, or embedded content, select whether or not to translate the data entered into the fields. For example, a product description may be translated, but the product name or brand name might only be valid in the original language.

c. On the appearance page for the data field, set what your data field will look like and if you want to apply any kind of validation. Each data field has different appearance values, such as validation, minimum or maximum length, the type of text editor to use (text area or rich-text editor), or if the data needs to follow a particular pattern, such as a valid email address or zip code. For details on the available out-of-the-box data fields and their options, see Data Fields. You can also custom field editors.
When you add a large text field and set the appearance to rich-text editor, you can select the type of toolbar: standard, basic, or custom. For custom rich-text editor, see Customize the Rich-Text Editor Toolbar.

d. In the digital asset type definition, you can group related fields to make it easier for contributors to work with digital asset forms.

- To create a group, click **Add Group**, and then name the grouping. Drag data fields to the groups as desired.
- Select whether you want the group to be expanded by default, collapsed by default, or hidden when viewed in the digital asset editor. For example, you might have mandatory fields that are in a group that is expanded by default and optional fields that are in a group that are collapsed by default, or you might need to edit an asset type at some point to hide a group of fields that have become obsolete.
- To edit a group name, click .

- To delete a group, click . Select whether you want to remove the data fields along with the group, or if you want to move the data fields to another group.

10. On the **Friendly URL** tab, you can enable a readable URL for digital assets created using this asset type.
    a. Select **Enable friendly item name for URL** to enable friendly URLs.
    b. If you're going to provide a custom prefix for the friendly URL and you want to include forward slashes in the prefix, select **Allow forward slash**.
    c. If you want to provide a custom prefix for the friendly URL, choose **Provide custom prefix for item name** from the drop-down list, and then enter your prefix in the text box.
    Digital assets created from this asset type will have a friendly URL in the format `<custom-prefix>-<digital-asset-name>`. For example, if you enter `marketing/blog-images` as the prefix and `Coffee Beans.jpg` is the name of the digital asset, the friendly URL would be `http://www.example.com/../../marketing/blog-images-coffee-beans`.

> **Note:**
>
> - The prefix can't contain any of the following characters: ``" # % & : ; < > = ? @ [ ] \ ^ ` { } | ~`` and `/` (unless you select to allow forward slash)
>   If you allow forward slashes in your friendly URL, you must URL-encode the slashes when making an API call or the call will fail.
> - Spaces in the prefix and in the content item name are replaced with hyphens (-) in the friendly URL.
> - The friendly URL will be all lower-case.
> - File extensions aren't included in the friendly URL.
> - You don't need to include a forward slash before or after your prefix. The forward slash before your prefix will be included automatically in the friendly URL. A hyphen (-) will be added between your prefix and the content item name.
> - Friendly URLs aren't created for items in business asset repositories, only items in digital asset repositories.

11. On the **Content Layout** page for the digital asset type, select the layouts, form, and preview pages you want to be available for this digital asset type. When a digital asset is created using this digital asset type, the person creating the asset will use the form you choose to enter the attributes for the asset and can preview how the asset will appear using any of the chosen layouts.
    - **Site Builder layouts:** (for use in digital asset repositories only) Choose desktop and mobile layouts for each layout style used in Site Builder. If the digital asset created using this type will be used on a website, the layouts should be created and uploaded prior to creating the digital asset type.

- **Custom and precompiled layouts:** (for use in digital asset repositories only) Add custom layout styles that can be published through the API and optionally used to publish HTML renditions for the published assets.
  a. Click **Add Layout Style**.
  b. Enter a style name.
  c. An API name is automatically generated, but you can edit it as desired. The API name must be unique.
  d. Select desktop and mobile layouts.
  e. If you want to publish HTML renditions of the content in this layout when the asset is published, select **Publish HTML**. When the asset is published an HTML rendition of the asset will be created automatically. Repository administrators can also manually republish HTML renditions for all published assets of this asset type.
- **Default preview layout:** Choose the default layout to be used by default to view and preview digital assets of this asset type in the web client.
  If you want asset users to preview these digital assets in a site page layout by default, you must first select the site page as described below and save the asset type. Then you can edit the asset type, return to the Content Layout tab, and the selected site page will appear in the default preview layout drop-down list.
- **Attribute editor form:**
  a. Choose the formform to be used as the attribute editor when adding or editing attributes for digital assets of this asset type.
  b. Choose whether you want the attribute editor to be displayed in a *slide-out* panel (drawer) or in the *sidebar* panel.
  c. If the form supports editing attributes across multiple selected assets, leave the checkbox selected.
- **In-place and external site previews:** (for use in digital asset repositories only) If you want the digital asset creator to be able to see what the digital asset will look like on a particular site page, select the Oracle Content Management-created site and page, or enter an external site and page URL. External URLs can include placeholders for `id`, `type`, `language`, and `slug`. For example, `http://www.example.com/mypage/{id}/{type}/{language}/{slug}` or `http://www.example.com/mypage?id={id}&lang={language}&type={type}&slug=(slug)`.

12. On the **Tile View** page for the asset type, you can specify a custom tile view. Custom tile views let you configure how the data fields of digital assets are displayed on the Assets page, based on asset type. By default, the tile displays the thumbnail of your digital asset, though some media may not have a thumbnail representation.
    - Under the **Display** area, select an option. In the available options, media data fields are represented by gray rectangles, title data fields are shown as thick gray bars, and text data fields are shown as thin gray bars.
    - Under the **Configuration** area, select the asset type fields to be used for each piece of data shown in the tile view (title, text, media).
    - If you selected a tile view that includes a thumbnail, you can select **Contain Media Thumbnail** to scale the thumbnail so that the entire thumbnail is shown in the media area. Otherwise the thumbnail will be zoomed and cropped to fill the media area.
13. For asset types that will be used in digital asset repositories, select the translation settings for the native media file. By default the media file will be inherited from the

master language and will be set to not translatable, so that all languages use the same media file. If you need to have localized media files, on the **General** tab for the asset type, disable **Inherit from master** and **Do not translate**.

> **Note:**
>
> When selecting **Inherit from master**, **Do not translate** is automatically selected. If editing an asset that has been used to create assets of different languages already, selecting **Inherit from master** causes the field values in the existing draft items to use the value in the master item. If the languages have already been published, then the preexisting value will remain in use until a new draft item of that language is published.

14. On the **Renditions** page, add rendition policies to define the required renditions you want to be automatically generated for images that use this asset type. You can create a new policy or add an existing policy. An asset type can include a maximum of twenty rendition policies, including system rendition policies (images have four system rendition policies), so you can add up to sixteen custom rendition policies.

    - To view the details of a rendition policy, click .
    - To edit a rendition policy, click .
    - To delete a rendition policy, click

To view the digital asset type's properties, click .

You must associate the digital asset type with at least one repository and grant users at least the contributor role on the repository so the digital asset type can be used to create digital assets.

Associate an Asset Type with a Repository

You must associate an asset type with a repository to make it available for use. After you do so, users with at least the contributor role will be able to use the asset type to create assets in that repository.

You can associate an asset type with a repository when you create the repository or you can edit the repository to add the asset type.

To edit a repository to add an asset type:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Repositories** from the drop-down list.
3. Open the repository you want to associate the asset type with.
4. Choose the asset types to be used with the repository. Asset types must be shared with you to be used. If someone else created a asset type that you want to associate with this repository, make sure it's shared with you so you can use it.

Note:

You can't remove asset types that are associated with connectors selected for this repository.

Edit an Asset Type

To edit an asset type:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Asset Types** from the drop-down menu.
3. Click the name of the asset type you want to edit.
4. Edit the asset type as necessary. For details on the asset type settings refer to Create a Digital Asset Type or Create a Content Type.

Note:

- If you delete a data field from an asset type has draft assets associated with it, the data field values in those assets will also be deleted.
- If you try to delete a data field from an asset type that has published assets associated with it, you won't be able to until you unpublish those assets.

Copy an Asset Type

You can quickly create a new asset type based off an existing one by copying it.

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Asset Types** from the drop-down menu.
3. Select the asset type you want to copy, and then click **Copy**.
4. Enter a name and optional description for your asset type, and then click **Create**.
5. The asset type is created with the same configuration as the original asset type. Edit the settings, and then click **Save**.

You must associate the asset type with at least one repository and grant users at least the contributor role on the repository so the asset type can be used to create assets.

Share an Asset Type

You share an asset type to allow other content administrators to *manage* the asset type itself. Sharing an asset type is like sharing any file or folder. Just select the asset type, click

Members, and choose members you want to be able to manage the asset type. You can share with individuals or with groups.

You control users ability to *use* an asset type through settings in the repository. First, the asset type must be associated with the repository. By default, that allows a user with access to the repository to view assets of the associated type. If the user has the contributor role for the repository they can also create, upload, edit, or delete assets of that type. You can further refine access to particular asset types with granular permissions.

Delete an Asset Type

You can delete existing asset types. You can't delete asset types that have assets associated with them or out-of-the-box asset types (File, Image, and Video).

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Asset Types** from the drop-down menu.
3. Select the asset type you want to delete, and then click **Delete**.

View Asset Type Properties

The asset type properties show when the asset type was created and last updated and the API information. You can also view or edit the description.

To view the properties, open the asset type, then click .

Property information is divided into tabs:

- **General** – displays the name, description, when the asset type was created, and when it was last updated. You can edit the description, and then click **Save** to save your changes.
- **API** – displays the asset type's ID and management URL. To copy the ID or URL to the clipboard, click next to it. To view the JSON data for the asset type, click { }.

Data Fields

Use data fields in asset types to define the content needed for the finished asset.

<table>
<tr><th>Data Field</th><th>Options</th></tr>
<tr><td>Text</td><td>Allows multiple values Single text box - default value, length validation, pattern validation (custom, email, URL, phone number, zip code) Text area - length validation, pattern validation (email, URL, phone number, zip code) Maximum of 2,000 characters. Can't include # * & | ? < > ^ ; { } ( ) ' = + \ Radio buttons - options or JSON Single-select menu - options or JSON Single-select menu (Visual Builder endpoint) - Visual Builder endpoint URL, endpoint security, REST fields to use as label and value</td></tr>
<tr><td>Large Text</td><td>Allows multiple values
Text area - default value, length validation, pattern validation (custom, email, URL, phone number, zip code)
Rich-text editor - toolbar type (standard, basic, custom), default value, length validation
See Customize the Rich-Text Editor Toolbar.
Markdown editor - toolbar type (standard, custom), default value, length validation
If you select custom as the toolbar type, you can select which buttons to include in the markdown editor toolbar.</td></tr>
<tr><td>Media</td><td>Allows multiple values
Media picker - select media types (documents, images, videos, other), select asset types (all or specific types)</td></tr>
<tr><td>Reference</td><td>Allows multiple values
Content item picker - select content types (all or specific types)</td></tr>
<tr><td>Date</td><td>Date picker
Date/time picker
Date/time picker with time zone
Default value
Date range validation</td></tr>
<tr><td>Number</td><td>Number spinner - default value, number range validation
Maximum of 15 characters. Must be a whole number, no decimals.
Radio buttons - options or JSON
Single-select menu - options or JSON</td></tr>
<tr><td>Decimal</td><td>Number spinner - default value, number range validation
Radio buttons - options or JSON
Single-select menu - options or JSON</td></tr>
<tr><td>Boolean</td><td>Switch - labels for true/false, default value
Checkbox - label for checkbox, default value</td></tr>
</table>

Data Field	Options
Embedded Content (JSON content)	• Text area - requires valid JSON syntax. Optionally, JSON value will be validated against included schema. • JSON Schema Form - requires a JSON schema to dynamically generate an interactive form for entering JSON content. You can provide options to customize how fields defined in the schema are presented on the form and preview the result. Currently supports version 04 of JSON Schema (https://json-schema.org/specification-links.html#draft-4). The following types are supported: • string • number • boolean • array The following options are supported: Text, Textarea, Number, Checkbox, Array, Select, and Radio. For more information, see the documentation for the Alpaca Forms package at http://www.alpacajs.org/documentation.html.

Customize the Rich-Text Editor Toolbar

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

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

To customize the toolbar, click the **JSON** tab, and edit the JSON configuration using syntax like the following examples.

The large text field supports the following actions and groups:

Actions: Anchor, BGColor, Blockquote, Bold, BulletedList, Copy, Cut, Font, FontSize, Format, HorizontalRule, Image, Indent, Italic, JustifyBlock, JustifyCenter, JustifyLeft, JustifyRight, Link, Maximize, NumberedList, Outdent, Paste, PasteText, Redo, RemoveFormat, Source, Strike, Subscript, Superscript, Table, TextColor, Underline, Undo, Unlink

Groups:

- basicstyles—Bold, Italic, Underline, Strike, Subscript, Superscript
- styles—Format, Font, FontSize
- clipboard—Cut, Copy, Paste, PasteText
- colors—TextColor, BGColor
- undo—Undo, Redo
- links—Link, Unlink, Anchor

- paragraph—
  - list—BulletedList, NumberedList
  - indent—Outdent, Indent
  - blocks—Blockquote
- align—JustifyLeft, JustifyBlock, JustifyRight, JustifyCenter
- insert—
  - image—Image
  - table—Table
  - horizontalrule—HorizontalRule
- mode—Source
- tools—Maximize (full screen view)
- cleanup—RemoveFormat

In addition, you can use the row separator entry: `"/"`

> **Note:**
>
> If you set any other value in the toolbarGroup configuration, the value will be removed before the Content Editor toolbar is created. You can't provide extraPlugins. Also, if the `toolbarGroups` configuration is used, `"name"/"groups"` is supported, but if the `toolbar` configuration is used, then `"name"/"items"` is supported.

You can use either `toolbarGroups` and `removeButtons`, or `toolbar` for the properties. See the examples below.

Example 23-1   Option 1: "toolbarGroups" and "removeButtons"

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

Example 23-2 Option 2: "toolbar"

```
{
    "toolbar": [
        {"name": "basicstyles", "items": ["Bold", "Italic",
"Underline", "Strike", "Subscript", "Superscript", "-",
"RemoveFormat"]},
        {"name": "paragraph", "items": ["NumberedList",
"BulletedList", "-", "Outdent", "Indent", "-", "JustifyLeft",
"JustifyCenter", "JustifyRight", "JustifyBlock"]},
        {"name": "links", "items": ["Link", "Unlink", "Anchor"]},
        {"name": "insert", "items": ["Image", "Table"]},
        "/",
        {"name": "styles", "items": [Format", "Font", "FontSize"]},
        {"name": "colors", "items": ["TextColor", "BGColor"]},
        {"name": "tools", "items": ["Maximize"]}
    ]
}
```

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Manage Taxonomies

A *taxonomy* is a hierarchy of categories, mapped to your business structure, used to organize your assets and to help users find assets by drilling down into the area they're working on. You can also use a taxonomy for site security purposes, to manage access to site content when multiple sites share a repository. You must be a content administrator to create taxonomies, but you can share them with other content administrators or repository administrators to help with building and managing them.

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

> **Note:**
>
> - If you're using Oracle Content Management Starter Edition, you're limited to only two taxonomies. To increase the number of taxonomies and take advantage of the full feature set, upgrade to the Premium Edition.
> - Taxonomies are available only in Oracle Content Management, not Oracle Content Management-Classic.

Taxonomy Lifecycle

When you create a taxonomy, it starts as a *draft*. You can share the taxonomy with other content administrators or repository administrators so they can help edit and manage the taxonomy and build the hierarchy of categories. When the taxonomy is finalized, you must promote it and associate it with at least one repository in order for it to be used with assets. Managers of the associated repositories will be notified by email that the taxonomy is ready. Then asset users can organize content into the categories. When you're ready to make the asset categorization information available publicly for your published sites and assets, you can publish the taxonomy.

As your business changes, you and the other users you shared the taxonomy with, can update your taxonomies. When you edit a promoted or published taxonomy, a new draft is created. Changes you make in the draft won't affect the repository organization. When the updated structure is approved, you can promote the new taxonomy version for use in your organization, and assets will be recategorized accordingly. Then you can publish the new version of the taxonomy when you're ready to make the category updates public.

Using a Taxonomy to Manage Sites in a Shared Repository

If you want multiple sites to share the same asset repository while you still control access to site-specific content, you use a taxonomy to apply the granular security. For example, site contributors would be able to access common assets such as corporate logos and assets intended for use on sites they manage, but not have access to assets intended for other sites. To use a taxonomy for site security, perform the following steps:

1. Create a taxonomy, selecting **Use for Site security management**, and adding at least one top-level category. The top-level category will contain categories for each new site that is created.
2. Promote the taxonomy.
3. Associate the taxonomy with the shared repository.
4. Create a site template, selecting **Require Site Security Taxonomy**.
5. Create a site from the template, selecting the shared repository and parent (top-level) category.

Oracle Content Management automatically adds a new site category to the taxonomy and creates groups for site viewers and site content contributors. Any assets added to the site will automatically be categorized with the site category. When the site is shared with someone, they will automatically be added to the appropriate site group, based on the role they're given.

Working with Taxonomies

By default the **Taxonomies** page shows all taxonomies you can edit or manage, sorted by name. You can see what versions are available for each taxonomy:

- —If a draft is available, you see a checkmark ( ) next to the draft icon.
- —If the taxonomy has been promoted, you see what version was most recently promoted.
- —If the taxonomy has been published, you see what version was most recently published.

Use the drop-down menus on the right to filter by taxonomy status, to see all taxonomies you have access to (not just the ones you can edit or manage), and to change the sort order. You can also use the search box to find a taxonomy by name.

Depending on your role, you can manage taxonomies in the following ways:

- Create a Taxonomy
- Promote a Taxonomy
- Publish a Taxonomy
- Associate a Taxonomy with a Repository
- Edit a Taxonomy
- Share a Taxonomy
- Delete a Taxonomy
- Export a Taxonomy
- Import a Taxonomy
- Preview a Taxonomy
- View Taxonomy Activity
- View or Edit Taxonomy Properties

- View or Edit Category Properties
- Configure Taxonomy Property Type Data Field Appearance

Create a Taxonomy

A *taxonomy* is a hierarchy of categories, mapped to your business structure, used to organize your assets and to help users find assets by drilling down into the area they're working on. You can also use a taxonomy for site security purposes, to manage access to site content when multiple sites share a repository.

You must be a content administrator to create taxonomies.

To create a taxonomy:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Taxonomies** from the drop-down list, and then click **Create**.
3. Enter a name for the taxonomy. Don’t use special characters in the name.
4. Enter an three-letter abbreviation for the taxonomy. If you don't enter an abbreviation, the first three letters of the taxonomy name will be used.
5. Enter an optional description describing what the taxonomy should be used for.
6. Click **Create**.
7. Build your taxonomy. Alternatively you can share the taxonomy to have other users help you build the taxonomy.
   - **Use taxonomy for site security**—If you're creating a taxonomy to manage sites in a shared repository, select **Use for Site security management**, and add at least one top-level category. Site categories are automatically created during site creation. You can't create site categories manually.
     You can't change this setting after the taxonomy has been published.
   - **Add a category**—To add a top-level category, click **Add Category**.
   - **Add a sibling**—To add a category at the same level as the selected category, click **Add Sibling** or .
   - **Add a child**—To add a category under the selected category, click **Add Child** or .
   - **Reorganize categories**—To reorganize a category, drag it to a new location; select it, and click **Indent** or **Outdent**; or select it, click **Move**, then select the category you want to move it into.
   - **Copy a category**—To copy a category, select it, and click **Copy**. Select the destination, and then click **Copy**.
   - **Rename a category**—To rename a category, select it, and change the name in the Category Properties pane, or click **Rename** or .
   - **Delete a category**—To delete a category, select it, and click **Delete** or
   - **Allow publishing**—If you want this asset categorization information available publicly for your published sites and assets, allow publishing of this taxonomy by selecting **Allow publishing of this taxonomy**.

You might not want to allow all taxonomies to be published. For example, if this taxonomy is only for business asset repositories or only for internal use, you won't want to publish it.

You can't change this setting after the taxonomy has been published.

This setting isn't available if you selected **Use for Site security management**.

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

8. When you're done, click **Done**.

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

Promote a Taxonomy

You must have the manager role for the taxonomy to promote the taxonomy.

To promote a taxonomy:

1. On the Taxonomies page, select the taxonomy you want to promote, and then click **Promote**.
2. Select whether you want this taxonomy to be publishable. For example, if this taxonomy is only for business asset repositories or only for internal use, you won't want to publish it.
3. Confirm that you want to promote the taxonomy, and then click **Promote**.

> **Note:**
>
> You can't promote empty taxonomies (taxonomies with no categories).

After promoting your taxonomy for the first time, you must associate it with at least one repository in order for it to be used with assets. Then users can categorize assets in the repository.

Publish a Taxonomy

This feature applies only to taxonomies that are used in digital asset repositories and will be used for published content. You can't publish a taxonomy that is used to manage sites in a shared repository.

When you publish a taxonomy, it can be published to any channels associated with the repositories that use the taxonomy. If the repositories don't already have publishing channels associated with them, associate them now.

You must have the manager role for the taxonomy to publish the taxonomy.

To publish a taxonomy:

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

2. By default, you see all the publishing channels associated with the repositories that use this taxonomy. You can optionally remove channels. The taxonomy information will be publicly available for any sites and assets that have been published to the selected channels.
3. Confirm that you want to publish the taxonomy, and then click **Publish**.

Associate a Taxonomy with a Repository

After you promote a taxonomy, you must associate it with at least one repository in order for it to be used with assets. Managers of the associated repositories will be notified by email that the taxonomy is ready. Then asset users can organize content into the categories.

You can associate a taxonomy with a repository when you create the repository or you can edit the repository to add the taxonomy.

To edit a repository to add a taxonomy:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Repositories** from the drop-down list.
3. Open the repository you want to associate the taxonomy with.
4. Under **Taxonomies**, choose the taxonomies to be used with the repository. Only promoted taxonomies are available in the list.

Edit a Taxonomy

Depending on your role for the taxonomy you can perform different edit actions on the taxonomy.

To edit a taxonomy:

1. On the Taxonomies page, select the taxonomy you want to edit, and then click **Edit**.
2. If you have at least the editor role, you can edit the categories and hierarchy as needed. Site categories are automatically created during site creation. You can't create, edit, or delete site categories.
3. To view the properties for the taxonomy or category, click . If you have the editor role, you can view the properties. If you have the manager role, you can also edit the properties.
4. When you're done making changes, click **Done**.

Remember to promote the new version of the taxonomy, and publish it if necessary.

Share a Taxonomy

You share a taxonomy to allow others to edit or manage the *taxonomy itself*. Sharing a taxonomy is like sharing any file or folder. Just select the taxonomy, click **Members**, and choose members you want to be able to edit or manage the taxonomy. You can share with individuals or with groups.

You control users ability to *use* a taxonomy through settings in the repository. First, the taxonomy must be associated with the repository. By default, that allows a user with access to the repository to view, filter by, and categorize assets with the taxonomy's categories.

Add a Member to a Taxonomy

You must have the manager role for the taxonomy to share the taxonomy.

To add a member to a taxonomy:

1. Select the taxonomy, and then click **Members**.
2. Enter part of the user or group name, display name, or email address, and then choose the user or group from the results. You see only those users who are content administrators or repository administrators. If you add a group, note that only those users who are content administrators or repository administrators will be able to access the Taxonomies page.
3. Choose the role you want them to have.
   - **Editor**—Edit the taxonomy by adding or removing categories.
   - **Manager**—Fully manage the taxonomy, including adding other users, promoting, publishing, and deleting the taxonomy.
4. Click **Add**.

View Taxonomy Member Activity

You can see which members were added, removed, or edited in the taxonomy membership.

1. If you're not already viewing the taxonomy membership, open it by selecting the taxonomy, and then clicking **Members**.
2. Open the sidebar by clicking .
   The Activity pane shows the following information about each change to the taxonomy membership.
   - The action that occurred, such as member added, removed, or role updated
   - The date and time the action occurred
   - The user who performed the action
   - A description of the action, including the member on which the action was performed

Delete a Taxonomy

You can delete taxonomies whether they are drafted or promoted. Published taxonomies must be unpublished first, and promoted taxonomies must be removed from any repository to which they are assigned.

You must have the manager role for the taxonomy to delete the taxonomy.

To delete a draft taxonomy:

- On the Taxonomies page, select the taxonomy you want to delete and click **Delete Draft**.

To delete a promoted taxonomy:

- On the Taxonomies page, select the taxonomy you want to delete and click **Delete Promoted**.

If a promoted taxonomy is assigned to a repository, a message prompts you to remove it from the assigned repository before attempting to delete it again. When you remove a taxonomy from an assigned repository, all of its categories are removed from the assets in the repository and they are recategorized. If the assets were published, the recategorized assets may need to be republished.

If a taxonomy has both a draft and a promoted state, then a **Delete** pull-down menu is available on the menu bar so you can select which taxonomy state you want to delete.

To delete a published taxonomy:

- On the Taxonomies page, select the taxonomy you want to delete and click **Unpublish**. Once unpublished, you can select and delete the promoted taxonomy.

Export a Taxonomy

You can export a taxonomy that has been promoted or published and download it as a JSON file. This is useful if you want to import a taxonomy as a draft version of a new or existing promoted taxonomy.

You must have the manager role for the taxonomy to export the taxonomy.

1. On the Taxonomies page, select the taxonomy you want to export from the list of promoted taxonomies.
2. Click **Export**.
   - If the promoted and published versions are the same, then a JSON file is created and a notification displays with a link to download the file.
   - If the promoted and published versions are different, then you are asked to choose which version to export. After selecting, a JSON file is created and a notification displays with a link to download the file.
3. Click **Download** and save the file.

Import a Taxonomy

You can import a taxonomy JSON file either as a new taxonomy or as a draft version of an existing promoted taxonomy.

You must be a content administrator to import the taxonomy.

To import a taxonomy:

1. On the Taxonomies page, click **Import**.
2. Navigate to the taxonomy JSON file in Oracle Content Management that you want to import. If the JSON file is not currently stored as a document in Oracle Content Management, click **Upload**, navigate to the JSON file and upload it to Oracle Content Management.
3. Once you have selected the taxonomy to import, click **OK**.

4. Choose to import the taxonomy as a draft of an existing taxonomy, or as a new taxonomy.
   - If you choose to import it as a draft of an existing taxonomy, the JSON file must be named the same as the existing taxonomy and the taxonomy must not have an existing draft.
   - If you choose to create a new taxonomy, the new taxonomy will take the name, abbreviation and description from the JSON file, or you can click **Provide new Name, Abbreviation and Description** and enter new information.
5. When done, click **Import**.

Preview a Taxonomy

You can preview any current version of a taxonomy (draft, promoted, or published) to which you have access.

You must have the manager role for the taxonomy to preview the taxonomy.

To preview a taxonomy:

1. On the Taxonomies page, select a taxonomy, and then, in the **View** menu, choose the version you want to view (draft, promoted, or published).
2. You can search for a category or expand categories to browse the taxonomy hierarchy.
3. When you're finished, click **Done** to close the taxonomy.

> **Note:**
>
> You can't edit the taxonomy or view its properties while previewing a taxonomy.

View Taxonomy Activity

The Taxonomy Activity pane details specific activities performed on the taxonomy such as taxonomy edits, category edits, promotion, repository association changes, publishing, export, and import.

You must have at least the *editor* role for the taxonomy to view the activity.

To view taxonomy activity:

1. On the Taxonomies page, select a taxonomy, and then click **Edit**.
2. Click . The properties pane opens.
3. In the drop-down menu, select **Activity**.

View or Edit Taxonomy Properties

The taxonomy properties show information such as taxonomy name, abbreviation, description, when the taxonomy was last updated, promoted, and published; the API information; and any custom properties.

You must have at least the *editor* role for the taxonomy to view the taxonomy properties. You must have the *manager* role for the taxonomy to edit taxonomy properties.

To view taxonomy properties:

1. On the Taxonomies page, select a taxonomy, and then click **Edit**.
2. Click . The properties pane opens.
3. In the drop-down menu, select **Taxonomy Properties**.

The Taxonomy Properties pane includes the following tabs:

- Taxonomy Properties
- Taxonomy Property Types

Taxonomy Properties

The **General** tab shows the properties for the taxonomy.

- Name, abbreviation, and description
- Date and time the taxonomy was last updated and by whom
- If the taxonomy has been promoted, you see the last version that was promoted
- Whether or not the taxonomy is used for site security; if the taxonomy has been published, it's not being used for site security
- If the taxonomy has been published, you see that last version that was published and the channels to which it was published.
- Taxonomy API ID—To copy the ID to the clipboard, click next to it.
- Custom properties

If you have the manager role for the taxonomy, you can change the following options:

- **Taxonomy information**—You can edit the name, abbreviation, and description.
- **Site security**—If the taxonomy hasn't been published yet, you can select or clear **Use for Site security management**. If you want multiple sites to share the same asset repository while you still control access to site-specific content, you use a taxonomy to apply the granular security.
- **Publishing**—If the taxonomy hasn't been published yet, you can select or clear **Allow publishing of this taxonomy**. Publishing a taxonomy makes the asset categorization information available publicly for your published sites and assets. You might not want to allow all taxonomies to be published. For example, if this taxonomy is only for business asset repositories or only for internal use, you won't want to publish it.
- **Custom properties**—You can edit the custom properties.
  - To add custom name/value pairs, click **Add**.

- To delete a property, click **x** next to it.

Taxonomy Property Types

The **Property Types** tab shows the standard and custom property types for taxonomy categories. Property types define the data fields and appearance for properties that can be stored for a category.

Standard property types include: Category Name, Description, Taxonomy Path, API Name, Keywords, Synonyms, and Related Categories. There might be some property types that you don't need to publish.

The **Custom Property Types** section lists any custom properties and whether they allow single or multiple values.

If you have the manager role for the taxonomy, you can perform the following actions:

- You can select whether or not to publish keywords, synonyms, related categories, and custom properties.
- To create a custom property:
  1. Click **Create Property Type**.
  2. Enter a name for the property type. It can't contain the following characters: ' ; " : ? < > % *

     > **Note:**
     >
     > The required API name is generated automatically and can't be changed.

  3. Enter an optional description describing what the taxonomy property type should be used for.
  4. Select whether the property can contain a single value or multiple values.
  5. If you want to allow publishing of this property type, select **Allow this field to be published**. Publishing a property type makes the asset categorization information available publicly for your published sites and assets. You might not want to allow all property types to be published. For example, if this property type is only for business asset repositories or only for internal use, you won't want to publish it.
  6. Click **Next**.
  7. On the appearance page, set what your data field will look like and if you want to apply any kind of validation. Each data field has different appearance options, such as validation, minimum or maximum length, or if the data needs to follow a particular pattern, such as a valid email address or zip code.
  8. When you finished, click **OK**.
- To edit an existing custom property, click .
- To delete a custom property, click **X**.

View or Edit Category Properties

The category properties show the category name, description, or API name.

You must have at least the *editor* role for the taxonomy to view the category properties. You must have the *manager* role for the taxonomy to edit category properties.

To view category properties:

1. On the Taxonomies page, select a taxonomy, and then click **Edit**.
2. Click . The properties pane opens.
3. To view category properties, select a category, and then, in the drop-down menu, select **Category Properties**.

The category properties include: Category Name, Description, Taxonomy Path, API Name, Keywords, Synonyms, Related Categories, and any custom properties. Properties that are publishable are indicated with an asterisk (*).

If you have the manager role for the taxonomy, you can edit the category properties: by clicking **Edit**. The Taxonomy Path isn't editable.

1. Click **Edit**.
2. Edit the name, description, API name, keywords, or synonyms.
3. Edit the related categories.
   - To add a related category, click +, select a taxonomy, select a category, and then click **Add**.
   - To edit a related category, click , and select a new category.
   - To delete a related category, click .
   - When you're finished, click Done.

Taxonomy Property Type Data Field Appearance

Set what your taxonomy property type data field will look like and if you want to apply any kind of validation.

Single Value Data Field Appearance Options

If you select single value, you have the following data value appearance options.

Appearance of Data Field	Options
Radio buttons	• Options—Enter the options that are available to the content contributor. You may also select one as a default option. • JSON—Enter JSON equivalent of options.
Single text box	• Default value—Optionally, enter the text you want as the default. • Length validation—Enter minimum and maximum character limits. • Pattern validation—Select a pattern (email, URL, phone number, zip code), or enter a custom regular expression.

Appearance of Data Field	Options
Single-select menu	• Options—Enter the options that are available to the content contributor. You may also select one as a default option. • JSON—Enter JSON equivalent of options.
Single-select menu (Visual Builder endpoint)	• Visual Builder endpoint URL • Endpoint security—Select if the Visual Builder endpoint requires an authenticated user. • REST field for label—Enter the REST field to use for the field label. • REST field for value—Enter the REST field to use for the field value. • Test the configuration.
Text area	• Default value—Optionally, enter the text you want as the default. • Length validation—Enter minimum and maximum character limits. • Pattern validation—Select a pattern (email, URL, phone number, zip code), or enter a custom regular expression.

Multiple Value Data Field Appearance Options

If you select multiple values, you have the following data value appearance options.

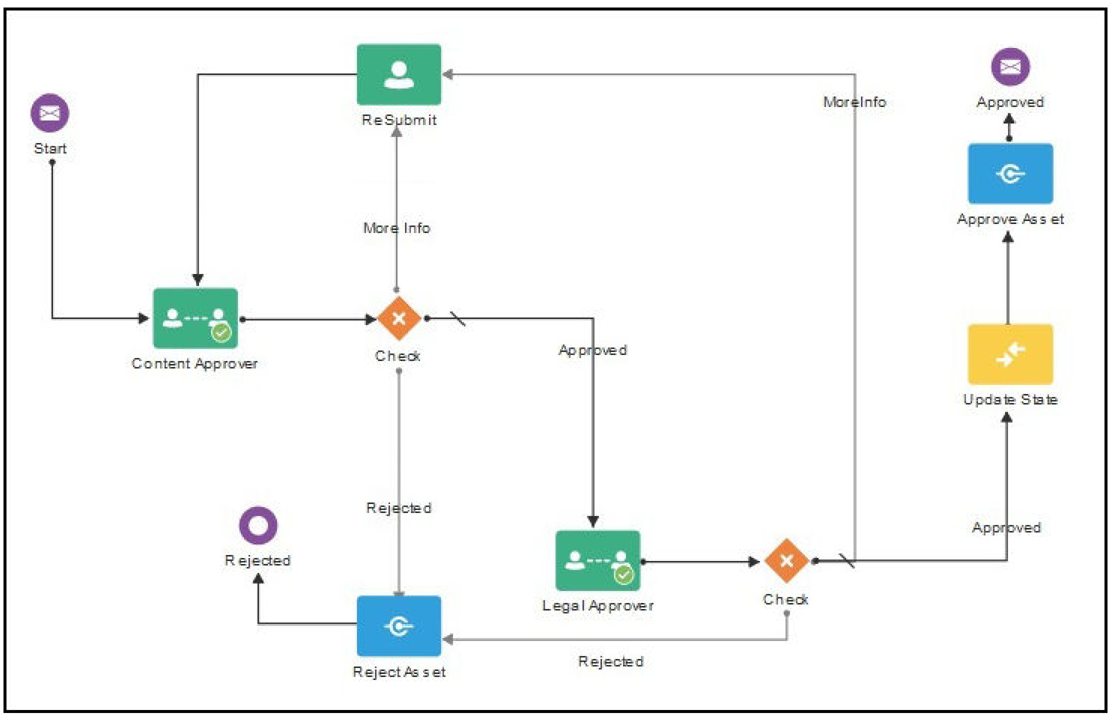
Appearance of Data Field	Options
Checkboxes	• Options—Enter the options that are available to the content contributor. You may also select one or more as default options. • JSON—Enter JSON equivalent of options.
Multi-select menu	• Options—Enter the options that are available to the content contributor. You may also select one or more as default options. • JSON—Enter JSON equivalent of options.
Multi-select menu (Visual Builder endpoint)	• Visual Builder endpoint URL • Endpoint security—Select if the Visual Builder endpoint requires an authenticated user. • REST field for label—Enter the REST field to use for the field label. • REST field for value—Enter the REST field to use for the field value. • Test the configuration.
Single text box	• Default value—Optionally, enter the text you want as the default. • Length validation—Enter minimum and maximum character limits. • Pattern validation—Select a pattern (email, URL, phone number, zip code), or enter a custom regular expression.
Tag cloud	• Default value—Optionally, enter the text you want as the default. • Length validation—Enter minimum and maximum character limits. • Pattern validation—Select a pattern (email, URL, phone number, zip code), or enter a custom regular expression.
Text area	• Default value—Optionally, enter the text you want as the default. • Length validation—Enter minimum and maximum character limits. • Pattern validation—Select a pattern (email, URL, phone number, zip code), or enter a custom regular expression.

25 Manage Workflows

If your service administrator has integrated Oracle Content Management with Oracle Integration and you're a repository administrator, you can register workflows that have been created in Oracle Integration for use in Oracle Content Management.

> **Note:**
>
> - If you're using Oracle Content Management Starter Edition, you're limited to only basic out-of-the-box approve/reject workflow. To take advantage of the full feature set, upgrade to the Premium Edition.
> - Workflows are not supported via the API. They are currently registered and managed through the Oracle Content Management interface.

For example, in the following diagram, an asset submitted to a workflow can either be rejected, returned for more information, passed on for additional approval, and then approved.



If your service administrator has created more complex workflows, then additional options may be available.

You can manage workflows in the following ways:

- Use Seeded Content Workflows
- Register Workflows
- Edit Workflow Membership
- Assign Workflow Roles
- Associate a Workflow with a Repository

Once you've registered a workflow, assigned it to a repository, added members, and assigned workflow roles, users can use the workflow when working with assets.

Use Seeded Content Workflows

Oracle Content Management provides a quick start application package with simple multi-step content approval workflows to use in Oracle Content Management.

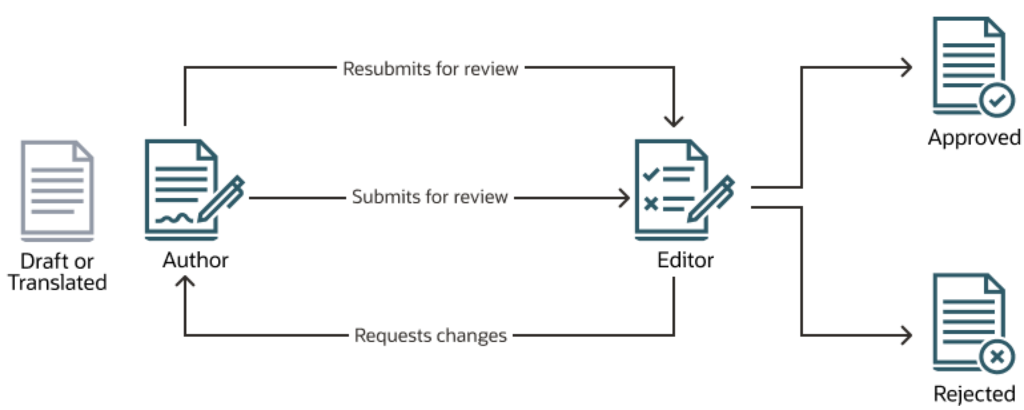
For instructions on downloading the quick start application package and setting up the processes for use, see Oracle Integration with Assets.

Here are some example use cases for the quick start processes:

- One-Step Content Approval Workflow Example
- One-Step Content Approval and Publish Workflow Example
- One-Step Content Approval and Publish with Extended Workflow Example
- Two-Step Content Approval Workflow Example with Single Change Request Option
- Two-Step Content Approval Workflow Example with Multiple Change Request Option
- Three-Step Content Approval Workflow Example with Single Change Request Option
- Three-Step Content Approval Workflow Example with Multiple Change Request Option

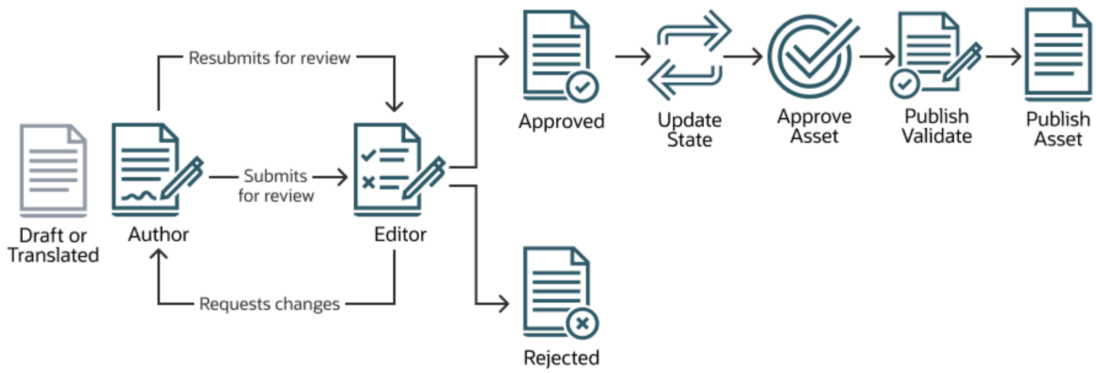
One-Step Content Approval Workflow Example

The one-step content approval workflow process (OCEOneStepApplication.exp) is a simple workflow where an author submits a draft for review (step 1) and the editor can approve, reject, or request changes. If the editor requests changes, then the changes are made and the author resubmits to start the workflow process again.



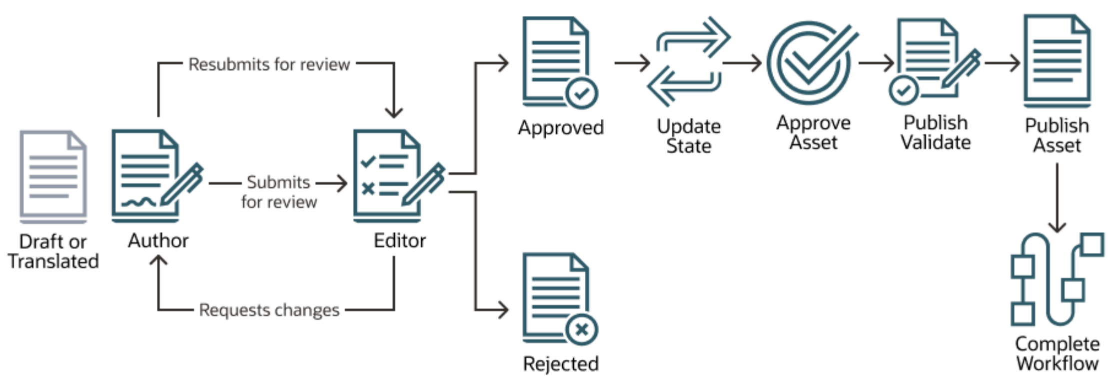
One-Step Content Approval and Publish Workflow Example

The one-step content approval and publish workflow process (OCEOneStepPublish.exp) is a simple workflow where an author submits a draft for review (step 1) and the editor can approve, reject, or request changes. If the editor requests changes, then the changes are made and the author resubmits to start the workflow process again. After the content is approved, Oracle Content Management validates and publishes the content.



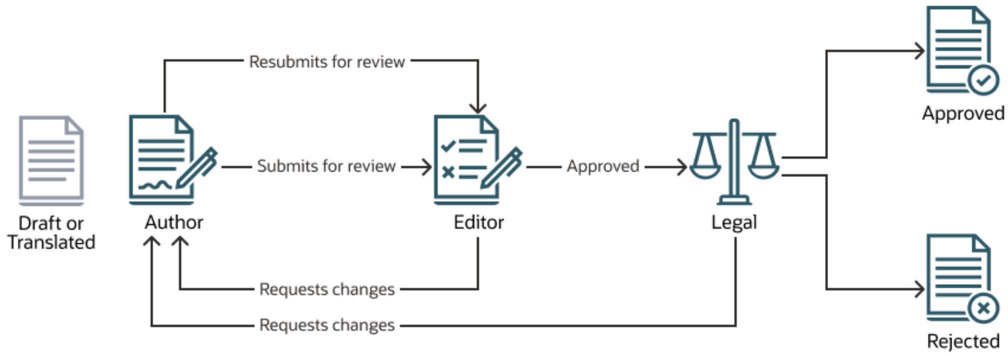
One-Step Content Approval and Publish with Extended Workflow Example

The one-step content approval and publish with extended workflow process (OCEOneStepPublishExtended.exp) is a simple workflow where an author submits a draft for review (step 1) and the editor can approve, reject, or request changes. If the editor requests changes, then the changes are made and the author resubmits to start the workflow process again. After the content is approved, Oracle Content Management attempts to validate and publish the content. If there are any issues during validating or publishing, the author is notified and asked to correct the issues, the asset stays in workflow, and the issue appears on the **In progress** tab of the Workflow panel.



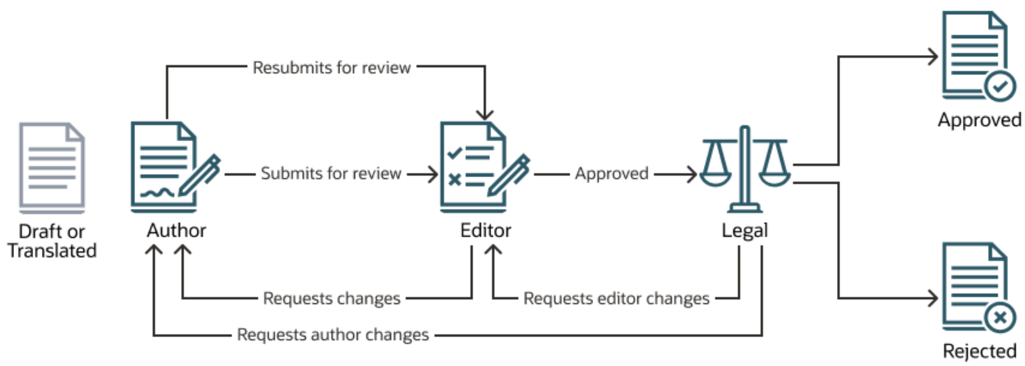
Two-Step Content Approval Workflow Example with Single Change Request Option

The two-step content approval workflow process (OCETwoStepApplication.exp) adds an additional approval layer where an author submits a draft for review and the editor can request changes or pass it along for final approval. For example, let's say that all items must be approved by the legal department for final approval. An author can submit their draft to an editor for approval (step one), who can request changes (restarting step one) or approve it and submit it to the legal department for final approval (step 2). The legal department can then approve it, or return the item to the author and request changes, starting the process again.



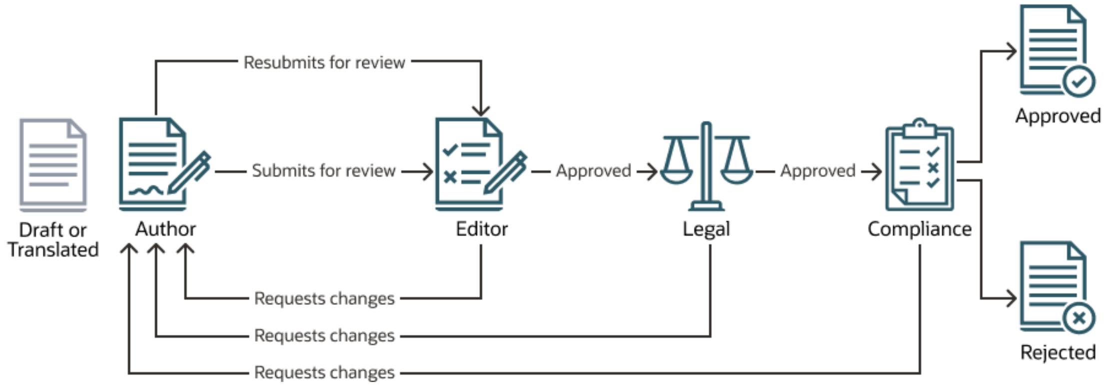
Two-Step Content Approval Workflow Example with Multiple Change Request Option

The two-step content approval workflow process (OCETwoStepApplication.exp) can shorten change requests by adding some complexity. For example, an author can submit their draft to an editor for approval (step one), who can request changes (restarting step one) or approve it and submit it to the legal department for final approval (step 2). By adding the option for the legal department to request changes from the editor rather than just the author, the workflow doesn't necessarily need to be re-started, potentially shortening the approval time.



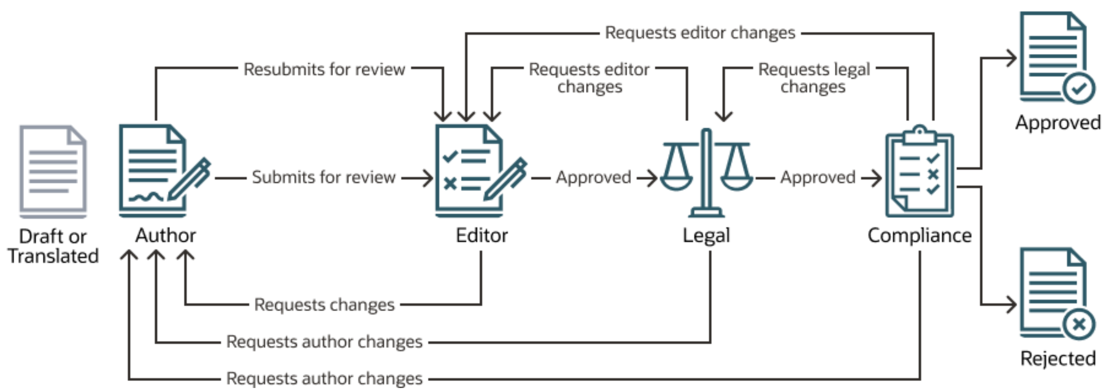
Three-Step Content Approval Workflow Example with Single Change Request Option

The three-step content approval workflow process (OCEThreeStepApplication.exp) adds an additional approval layer. For example, let's say that all items must be approved by the legal department but then final approval must come from the compliance department. An author can submit their draft to an editor for approval (step 1), who can request changes (restarting step 1) or approve it and submit it to the legal department for approval (step 2). The legal department can then return the item to the author and request changes, starting the process again, or pass it to the compliance department (step 3). The compliance department can then request changes from the author (restarting the process), or approve it.



Three-Step Content Approval Workflow Example with Multiple Change Request Option

The three-step content approval workflow process (OCEThreeStepApplication.exp) can shorten change requests by adding some complexity. For example, an author can submit their draft to an editor for approval (step 1), who can request changes (restarting step 1) or approve it and submit it to the legal department for approval (step 2). The legal department can then return the item to the author for changes (restarting the process). However, by adding the option to request changes directly from the editor, the legal department doesn't have to restart the workflow, which can shorten the process. Once the legal department approves it, the item is passed to the compliance department (step 3). The compliance department can then request changes from the author (restarting the process), or shorten the process by requesting changes from either the editor or legal department, and finally, approving it.



Register Workflows

If you are a repository administrator, you can register new workflows, unregister current workflows, view workflow details such as assigned repositories and workflow roles, add members and share workflows using the Oracle Content Management web interface, so they are registered for those who need them.

- View Registered Workflows
- Register a Workflow
- Unregister a Workflow
- Disable a Workflow

View Registered Workflows

To see a list of registered workflows and their details:

1. Click **Content** in the administration area of the side navigation menu and select **Content Workflows** from the banner menu.
2. Select a workflow and click **View** in the menu bar to see workflow details such as assigned repositories and workflow roles.

Register a Workflow

To register a new workflow:

1. Click **Content** in the administration area of the side navigation menu and select **Content Workflows** from the banner menu.
2. Click **Register** in the banner menu and choose the workflow you want to register from the **OIC Process** menu. Available processes are defined in Oracle Integration by a service administrator.
3. Click **Register** in the dialog. The registered workflow name and description are displayed in the workflow list on the content workflows page.

Once a workflow is registered, you must associate it with at least one repository for users to be able to use the workflow when working with assets.

Unregister a Workflow

To unregister a workflow, select it and click **Unregister** in the menu bar. The workflow is removed from the list.

Disable a Workflow

To disable a workflow, select it and click **Disable**. Assets cannot be submitted to disabled workflows, but the workflow is still registered and displayed in the workflow list and can be enabled again later.

Edit Workflow Membership

To add members to a workflow:

1. Click **Content** in the administration area of the side navigation menu and select **Content Workflows** from the banner menu.
2. Select the workflow you want to add member to and click **Members** in the menu bar.
3. Click **Add Members** in the dialog. Members must have manager rights to the workflow and so are given the manager role by default.
4. Click **Add**.
5. When you've finished adding members, click **Done**.

To remove members from a workflow:

1. Click **Content** in the administration area of the side navigation menu and select **Content Workflows** from the banner menu.

2. Select the workflow you want to remove a member from and click **Members** in the menu bar. A list of members is displayed.
3. Find the member you want to remove and select **Remove** from the member menu.
4. Click **Done**.

Assign Workflow Roles

Workflow roles are part of the workflow process and are defined in Oracle Integration by a service administrator when the workflow process is defined. Workflow roles determine the actions available for workflow tasks to workflow members assigned to the role. When you register a workflow in Oracle Content Management, the associated workflow roles are made available in Oracle Content Management.

To assign members to workflow roles:

1. Click **Content** in the administration area of the side navigation menu and select **Custom Roles** from the banner menu.
2. Click the **Workflow Roles** tab. A list of workflow roles is displayed.
3. Select the role you want to assign members to and click **Members** in the actions bar.
4. Click **Add Members**.
5. Enter names or email addresses of the users you want to add as members. All members of a workflow role can perform the action defined for the role. Optionally, edit the message that will be sent to these users letting them know that they have been assigned the workflow role.
6. When you've finished adding members, click **Add**.

Associate a Workflow with a Repository

You must associate a workflow with at least one repository in order for it to be used. Then asset users can use the workflow when working with assets in that repository.

You can associate a workflow with a repository when you create the repository or you can edit the repository to add the workflow.

To edit a repository to add a workflow:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Repositories** from the drop-down list.
3. Open the repository you want to associate the workflow with.
4. On the **Workflows** tab, choose the workflows to be used with the repository. These workflows will show in the assignments boxes on this page and to users when they create assets in this repository.
5. In the **Workflow Assignments** section, select automatic and default workflows for the asset types associated with this repository, and specify whether default workflows are required.
   - **Any Asset Type**: Selections you make in this row will be propagated to all the asset types, but you can override the settings for individual asset types as desired.

- **Automatic Start**: If you want assets that are added this repository from a user's computer to be automatically submitted to a workflow when the asset is created, select a workflow in this column.

> **Note:**
>
> Assets added from Oracle Content Management or from third-party cloud storage providers currently don't support automatic workflow assignment.

- **Manual Start Default**: If you want assets in this repository to be manually submitted to a default workflow, select a workflow in this column, and select whether the workflow is **Required**.
  When a user views the Workflow panel for an asset for the first time, the default workflow will be selected. The user will only be able to change this workflow selection if the workflow *isn't* required. The user must click **Submit for Review** for the workflow to be initiated.

26 Manage Custom Roles

There are two types of custom roles:

- **Editorial roles**—Easily assign granular permission sets that you can apply to multiple repositories. Additionally, if you need to change the permission set, you can edit the role and the changes will apply to all repositories that use the editorial role.
- **Workflow roles**—When you register an Oracle Integration workflow in Oracle Content Management, the associated workflow roles are made available in Oracle Content Management. Assign members to workflow roles to determine the actions available for workflow tasks.

Repository administrators can manage custom roles in the following ways:

- Create an Editorial Role
- Edit an Editorial Role
- Copy an Editorial Role
- Share an Editorial Role
- Delete an Editorial Role
- View Editorial Role Properties
- Assign Workflow Roles

Create an Editorial Role

Repository administrators can create custom editorial roles to easily assign granular permission sets that you can apply to multiple repositories. Additionally, if you need to change the permission set, you can edit the role and the changes will apply to all repositories that use the editorial role.

To create editorial roles:

1. Click **Content** in the administration area of the side navigation menu and select **Custom Roles** from the banner menu.
2. On the **Editorial Roles** tab, click **Create**.
3. Enter a name, and, optionally, a description for the role.
4. By default, the role provides View access to all asset types and taxonomies (**Any Type** and **Any Category**). Select specific assets types and taxonomy categories for which you want to refine permissions:
   - To refine access to specific asset types, in the Assets column click **Add**, select asset types, then click **Save**.
     You can add up to 50 asset type rules.
   - To refine access to specific taxonomy categories, in the Taxonomies column click **Add**, select categories, then click **Save**.
     You can add up to 30 taxonomy category rules.

5. Select the appropriate permissions for asset types as a whole (**Any Type**), taxonomy categories as a whole (**Any Category**), and any selected asset types and categories.
   If you selected a site security taxonomy (used to manage sites in a shared repository) and a non-site category, you can also assign the **Create Site** permission. Users with the Create Site permission can create SST sites in the repository under the selected category.
6. When you're done refining access, click **Save**.

Now you can add the role to a repository and assign the role to users and groups.

Edit an Editorial Role

Repository administrators who are managers of an editorial role can edit the role, changing permissions as necessary.

1. Click **Content** in the administration area of the side navigation menu and select **Custom Roles** from the banner menu.
2. On the **Editorial Roles** tab, select the role, and then click **Edit**.
3. Edit the permissions as desired.:
   - To refine access to specific asset types, in the Assets column click **Add**, select asset types, then click **Save**.
     You can add up to 50 asset type rules.
   - To refine access to specific taxonomy categories, in the Taxonomies column click **Add**, select categories, then click **Save**.
     You can add up to 30 taxonomy category rules.
4. Select the appropriate permissions for asset types as a whole (Any Type), taxonomy categories as a whole (Any Category), and any selected asset types and categories.
   If you selected a site security taxonomy (used to manage sites in a shared repository) and a non-site category, you can also assign the **Create Site** permission. Users with the Create Site permission can create SST sites in the repository under the selected category.
5. To edit the name or description, click .
6. When you're done editing the role, click **Save**.

If the role was already added to any repositories, the changes will be applied to those repositories.

Copy an Editorial Role

Repository administrators can copy an existing editorial role, and then edit the permissions.

1. Click **Content** in the administration area of the side navigation menu and select **Custom Roles** from the banner menu.
2. On the **Editorial Roles** tab, select the role, and then click **Copy**.
3. Enter a name, and, optionally, a description for the role, and then click **Save**.
4. Select the new role, and then click **Edit**.

5. Edit the permissions as desired.:
   - To refine access to specific asset types, in the Assets column click **Add**, select asset types, then click **Save**.
   - To refine access to specific taxonomy categories, in the Taxonomies column click **Add**, select categories, then click **Save**.
6. Select the appropriate permissions for asset types as a whole (Any Type), taxonomy categories as a whole (Any Category), and any selected asset types and categories. If you selected a site security taxonomy (used to manage sites in a shared repository) and a non-site category, you can also assign the **Create Site** permission. Users with the Create Site permission can create SST sites in the repository under the selected category.
7. When you're done refining access, click **Save**.

Now you can add the role to a repository and assign the role to users and groups.

Share an Editorial Role

Repository administrators who are managers of an editorial role can share the role to allow others to *manage* the editorial role itself. Sharing an editorial role is like sharing any file or folder. Just select the role, click **Members**, and choose members you want to be able to manage the role. You can share with individuals or with groups.

You *assign* the role to users by adding the role to a repository and assigning it to users and groups.

Delete an Editorial Role

Repository administrators who are managers of an editorial role can delete the role. You can't delete editorial roles that have been added to a repository.

1. Click **Content** in the administration area of the side navigation menu and select **Custom Roles** from the banner menu.
2. On the **Editorial Roles** tab, select the editorial role you want to delete, and then click **Delete**.

View Editorial Role Properties

The editorial role properties show which repositories the role has been added to, when the editorial role was created and last updated, and an activity log for the role.

To view the properties, repository administrators can open or edit the editorial role, then click .

Property information is divided into tabs:

- **General**—displays the name, description, which repositories the role has been added to, when the role was created, and when it was last updated.
- **Activity**—displays the activity history for the role (such as created, renamed, copied), including who performed the activity.

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Manage Localization Policies

Localization policies are the translation rules applied to any assets in a repository. A localization policy defines if a translation will be required and if so, what the required languages are for assets and any optional languages that might be used. You must be a repository administrator to manage localization policies.

> **Note:**
>
> Localization policies aren't used in business asset repositories.

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

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

By default the **Localization Policies** page shows all localization policies, sorted by name. Use the drop-down menu on the right to change the sort order. You can also use the search box to find a localization policy by name.

You can manage localization policies in the following ways:

- Create a localization policy.
- Delete a localization policy.
- Create custom locales for translation.

Create a Localization Policy

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

To create a localization policy:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Localization Policies** from the drop-down list and then click **Create**.
3. Enter a name for the policy. Don't use special characters in the name.
4. Enter an optional description for the policy.

5. Choose the required languages for this policy from the drop-down list. To deselect a language, click the X. You can type part of the language name and results are shown, letting you quickly find the language you want to use. Assets created in a repository associated with this localization policy won't be able to be published unless they have translations for all required languages.
6. If desired, select one of the required languages as a default language for sites and assets published with this localization policy. If a user tries to view a site or asset in a language for which there is no version, the site or asset will appear in the default language.
7. Choose optional languages for the policy. Assets created in a repository associated with this localization policy don't need to have translations for these optional languages in order to be published.
8. Click **Save** when done.

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

Delete a Localization Policy

You can’t delete a localization policy if it's associated with a publishing channel. You have to remove the association in order to delete the localization policy.

To delete a localization policy, select it and then click **Delete**.

Create Custom Locales for Translation

When submitting an item for translation the target language (locale) is identified by a code so the language service provider knows what language to translate the item into and return. For example, **fr** represents French and **de** represents German. If you are a developer for your organization, you can create custom locales for translation based on your organization's needs. Custom locale codes include the base language, any regional dialect code if applicable, an **x** to designate it is a custom locale, and whatever other identifying customization is required by your organization. For example, a custom local for English might look like **en-JM-x-custom**.

1. Click **Content** in the Administration section of the side navigation menu.
2. Select **Localization Policies** from the banner menu.
3. Click **Languages** in the banner.
4. Select the base language code with whatever regional dialect code you want to use for your custom locale.
5. Enter the custom locale tokens in the field next to the base code. Custom local tokens cannot be more than 8 characters, but any number of tokens can be entered when separated by a dash. Only alphanumeric characters (A-Z and 0-9) are valid.
6. Enter an optional description. If no description is entered, the default is to display the base language code description.
   For example, if you select **Portuguese (Brazil) (pt-BR)** as your base code and dialect, you can enter **custom-south-america** as your tokens. The resulting custom locale displayed in the Language Code list would be **pt-BR-x-custom-south-america**. If no description was entered, then the description for the custom

locale would be **Portuguese (Brazil)**. If a description of **Portuguese South America** was entered, then that would be displayed as the description.

7. Click **Add**. The custom locale is now available when creating localization policies.

To delete a custom locale, click next to the custom local type in the Language Code list.

28

Manage Publishing Channels

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

> **Note:**
>
> - If you're using Oracle Content Management Starter Edition, you're limited to only one publishing channel, not including the one allowed site channel. To increase the number of publishing channels and take advantage of the full feature set, upgrade to the Premium Edition.
> - Publishing channels aren't used in business asset repositories.

A publishing channel can be applied to one or more asset repositories and the assets managed in the repositories. In addition, one repository might use multiple channels. Specific assets in a repository can use different channels, letting you fine tune the policies to be applied in individual cases.

When a site is created, a publishing channel is automatically created using the site name as the channel name.

By default the **Publishing Channels** page shows all publishing channels, sorted by name. Use the drop-down menu on the right to change the sort order. You can also use the search box to find a publishing channel by name.

You can manage publishing channels in the following ways:

- Create a Publishing Channel
- Associate a Publishing Channel with a Repository
- Share a Publishing Channel
- Delete a Publishing Channel
- View Publishing Channel Properties

Create a Publishing Channel

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

To create a channel:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Publishing Channels** from the drop-down list and then click **Create**.

3. Enter a name for the channel. Don’t use special characters in the name.
4. Enter an optional description. It’s useful to describe how the channel can be used so others will understand it quickly and easily.
5. Decide what the publishing policy will be. You can elect to have items published without approval, or restrict publishing to only those items that have been through an approval process.
6. Choose the localization policy to use for the channel.
7. Select a search results ranking policy and the asset types to which you want to apply the ranking policy.
   - If you set a ranking policy scope, the ranking policy will be applied to results that match the ranking policy rules, but only if the assets are of an asset type selected here.
   - If you don't set a ranking policy scope and a user limits their search to one or more asset types, the ranking policy will be applied to all results that match the ranking policy rules (both standard field rules and user-defined field rules).
   - If you don't set a ranking policy scope and a user doesn't limit their search to an asset type, only the standard field rules in the ranking policy will be used to apply the ranking policy.
8. Decide if the channel will be public or secure. A public channel is one that can be used by anyone in your organization. A secure channel is limited to people with a specific role.
9. If you selected **Secure**, select which groups of registered users can access the assets or other resources published to this secure channel.
   - **Cloud Users**: Only Oracle cloud users who can sign into your identity domain can access the secure content.
   - **Service Users**: Only users who can sign into this instance of Oracle Content Management can access the secure content.
   - **Specific Users**: Specify users who can access the secure content. Click **Manage Users**, then click **Add Members**. Enter a user name or a portion of a user name in the search field, and select the user from the displayed list. Repeat the process to add more users. When you're done adding users click **Add**. To remove a user, click **Remove** from the menu below the user’s name. When selecting users, click **Done**.
10. Click **Save** when done.

After the channel is created, a channel ID and a channel token are assigned to the channel. If you created a secure channel, a channel secret is also assigned to the channel. These values can be used when creating customized interfaces. To see the values, click the channel to open it in the editor.

Associate a Publishing Channel with a Repository

You must associate a publishing channel with at least one repository in order for it to be used to publish assets in the repository.

You can associate a publishing channel with a repository when you create the repository or you can edit the repository to add the publishing channel.

To edit a repository to add a publishing channel:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Repositories** from the drop-down list.
3. Open the repository you want to associate the publishing channel with.
4. Under **Publishing Channels**, choose the publishing channels to be used with the repository.

Edit a Publishing Channel

To edit a channel:

1. Sign in as a repository administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Publishing Channels** from the drop-down list.
3. Click the publishing channel you want to edit.
4. Edit the publishing policy, localization policy, search results ranking policy, or ranking policy scope as necessary.
5. If you created a secure channel and need your API client app to access the secure content, use the channel secret:
   - To copy the **Channel Secret**, click .
   - To get a new channel secret, click **Refresh**.
   - To revoke access through the channel secret, click **Revoke**.
   - If you changed the published resources access from public to secure, you'll need to save your changes and open the channel in the editor again to see the channel secret.
6. If you need to supply your API client app with channel information, use the channel ID and token. Click to open the Properties pane, then click the **API** tab.
   - To copy the **Channel ID** or **Channel Token**, click next to the value.
   - To get a new channel token, click **Refresh**.
7. Click **Save** when done.

Share a Publishing Channel

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

If you assign someone a Manager role, make sure that person is a repository administrator. That will allow the user to fully manage the channel, including adding other users, publishing assets to the channel, and doing other administrative tasks.

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

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

Delete a Publishing Channel

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

To delete a publishing channel, select it and then click **Delete**.

View Publishing Channel Properties

The publishing channel properties show when the publishing channel was created and last updated and the API information. You can also view or edit the name and description.

To view the properties, open the publishing channel, then click .

Property information is divided into tabs:

- **General** – displays the name, description, when the publishing channel was created, and when it was last updated. You can edit the name or description, and then click **Save** to save your changes.
- **API** – displays the channel ID and channel token. To copy the ID or token to the clipboard, click next to it.
  If the channel token is ever compromised, you can prevent unwanted access to any content previously published to the channel by refreshing the channel token. Click **Refresh**.

29 Manage Rendition Policies

Your images are likely used in multiple channels (mobile, tablet, web, etc.). Each channel might have different format, quality, and size requirements. You can use different *renditions* of an image to accommodate each channel's requirements.

When you add an image to a repository, several renditions are automatically generated by Oracle Content Management. By default, you'll get *system renditions*—large, medium, small, and thumbnail. However, you can create custom *rendition policies* to define your own rules and conditions for image renditions that are needed for specific channels. You then associate the rendition policy with a digital asset type, and when an image is created from that asset type, your custom rendition will be automatically generated along with the system renditions.

> **Note:**
>
> Rendition policies aren't applied to assets in business asset repositories.

You must be a content administrator to create and manage rendition policies.

By default the **Rendition Policies** page shows all rendition policies sorted by name. Use the drop-down menu on the right to change the sort order. You can also use the search box to find a rendition policy by name.

You can manage rendition policies in the following ways:

- Create a Rendition Policy
- Associate a Rendition Policy with a Digital Asset Type
- Edit a Rendition Policy
- Copy a Rendition Policy
- Delete a Rendition Policy

Create a Rendition Policy

A *rendition policy* enables you to configure rules and conditions for image renditions that are needed for particular channels. You must be a content administrator to create and manage rendition policies.

To create a rendition policy:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Rendition Policies** from the drop-down list, and then click **Create**.
3. Enter a name for the rendition policy.

> **Note:**
>
> The API Name is generated automatically based on the rendition policy name you entered, or you can overwrite the auto-generated name. You would use the API name to invoke the rendition policy when using REST API calls.

4. Enter an optional description explaining what the rendition policy is used for.
5. In the **Input Format** box, select one or more image formats to which you want to apply this policy. To enable support for all current and forthcoming media types, select **All Supported Image Types**.
6. Select the **Output Format** (the resulting image format) you want for the automatically created rendition.
7. Select the **Image Quality** you want for the automatically created rendition.
8. Select the **Transformation** you want to apply to the automatically created rendition:
   - **Scale to Height**, and enter the height to which you want to scale
   - **Scale to Width**, and enter the width to which you want to scale
   - **Crop to Center - By Aspect Ratio**, and enter the aspect ratio to which you want to crop
   - **Crop to Center - By Dimension**, and enter the dimension to which you want to crop
9. When you're done, click **Save**.

When the rendition policy is finalized, you must apply it to one or more digital asset types.

Associate a Rendition Policy with a Digital Asset Type

You must associate a rendition policy with at least one digital asset type in order for it to be used to automatically generate renditions for images.

You can associate a rendition policy with a digital asset type when you create the asset type or you can edit the asset type to add the rendition policy.

To edit a digital asset type to add a rendition policy:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Asset Types** from the drop-down list.
3. Open the digital asset type you want to associate the rendition policy with.
4. On the **Renditions** tab, click **Add Existing Policy**, and choose the rendition policy to apply to the asset type.

Edit a Rendition Policy

To edit a rendition policy:

1. On the Rendition Policies page, select the rendition policy you want to edit, and then click **Edit**.
2. Edit the settings as needed.
3. When you're done making changes, click **Save**.

Copy a Rendition Policy

You can quickly create a new rendition policy based off an existing one by copying it.

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Rendition Policies** from the drop-down menu.
3. Select the Rendition policy you want to copy, and then click **Copy**.
4. Enter a name for your rendition policy, and then click **Continue**.
5. The rendition policy is created with the same configuration as the original policy. Edit the settings, and then click **Save**.

When the rendition policy is finalized, you must apply it to one or more digital asset types.

Delete a Rendition Policy

To delete rendition policies, choose **Delete** in the right-click menu; or select one or more rendition policies, and then **Delete** in the actions bar.

You can't delete a rendition policy that is associated with a repository. You must first remove the rendition policy from the repository.

30 Manage Audience Attributes

Recommendations are a way to provide personalized experiences for website visitors by showing assets based on location or areas of interest. Audience attributes are what recommendations use to find and display that personalized content. They can include things like viewer location, the date a viewer is visiting the site, or what products interest a viewer. You must be a content administrator to manage audience attributes.

For example, when a viewer in California visits a site with recommended content, they may be shown upcoming events in Los Angeles about cloud computing. If a person in France visits the same site, they would see upcoming events in Paris.

> **Note:**
>
> Audience attributes and recommendations aren't used in business asset repositories.

You use audience attributes when creating the rules in a recommendation. There are three types of audience attributes:

- **Custom**—created by a site administrator typically to pass a value based on the page context. For example, a custom attribute for "product interest" can be used on two different pages (one on databases, one on cloud computing) to display two different products depending on the value passed to the attribute.
- **Session**—predefined attributes based on information unique to a viewing session. For example, a customer IP address determines viewer location and time zone, while a browser user-agent determines what device is being used so viable media can be served.
- **System**—attributes unique to the Oracle Content Management system, such as current date.

You can manage audience attributes in the following ways:

- View Audience Attributes
- Create Custom Attributes

View Audience Attributes

To view audience attributes, you must be a content administrator.

1. Click **Content** from the Administration section of the side menu.
2. Select **Audience Attributes** from the Content page menu.
3. Click an attribute type to view a list of available attributes for that type.

Create Custom Attributes

To create custom attributes, you must be a content administrator.

1. Click **Content** from the Administration section of the side menu.
2. Select **Audience Attributes** from the Content page menu.
3. Click **Custom** to view a list of available custom attributes.
4. Click **Create**.
5. Enter a name for the attribute. For example, *Product Interest*.

> **Note:**
>
> The API Name is generated automatically based on the attribute name you entered, or you can overwrite the auto-generated name. You would use the API name to invoke the attribute when using REST API calls.

6. Enter an optional description for the attribute and click **Create**.

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Manage Ranking Policies

Oracle Content Management uses an out-of-the-box ranking policy by default to sort search results by relevance (provided there are no orderBy clauses on the search request). However, you can create custom ranking policies to better control the relevance score of indexed items returned by a search request. You must be a content administrator to create and manage ranking policies.

> **Note:**
>
> - Custom ranking policies aren't supported in Oracle Content Management Starter Edition. To take advantage of the full feature set, upgrade to the Premium Edition.
> - Ranking policies aren't used in business asset repositories.

A custom ranking policy is a collection of configurable properties that can relate to:

- Searchable fields in assets of specific content types
- Searchable attributes in assets of specific custom digital asset types
- Field or attribute weighting
- Indexed item matching behavior

Here's the basic custom ranking policy life cycle:

1. Create a ranking policy. When you create a ranking policy, it starts as a *draft*.
2. Promote the ranking policy. When you're ready to assign the ranking policy to publishing channels, you must promote it.
3. Test the ranking policy. Use the REST APIs to test the ranking policy to make sure it has the desired affect on search results.
4. Publish the ranking policy. To make the ranking policy available to use as a global default and apply it to users' searches, you must publish it.
5. Use ranking policies.
   - Assign a ranking policy as the *global* default.
   - Assign a ranking policy as a *publishing channel* default, overriding the global default, and controlling how matched items are sorted by default in searches within the channel. You can also set a ranking policy scope by selecting asset types to which you want to apply the ranking policy.
   - Pass in a ranking policy as a URL parameter for a search query, overriding the global default and any channel default, and controlling how matched items are ranked by relevance in this particular search request.
6. Edit the ranking policy. As your business changes and your understanding of how your users search your system grows, you can update your ranking policies by creating a new

draft version. Changes you make in the draft won't affect the current search rankings. When the updated policy is approved, you can promote the new ranking policy version for use in your organization, and it will be applied to searches. Then you can publish the new version of the ranking policy when you're ready to make the updates public.

By default the **Ranking Policies** page shows all ranking policies—draft, promoted, and published—sorted by name. Use the drop-down menus on the right to filter by ranking policy status and to change the sort order. You can also use the search box to find a ranking policy by name.

You can further manage ranking policies on the Ranking Policies page in the following ways:

- Copy a Ranking Policy
- Delete a Ranking Policy
- View Ranking Policy Properties

Create a Ranking Policy

A *ranking policy* enables you to control the ranking of indexed items matching a search query in Oracle Content Management. You must be a content administrator to create and manage ranking policies.

To create a ranking policy:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Ranking Policies** from the drop-down list, and then click **Create**.
3. Enter a name for the ranking policy.

> **Note:**
>
> The API Name is generated automatically based on the ranking policy name you entered, or you can overwrite the auto-generated name. You would use the API name to invoke the ranking policy when using REST API calls.

4. Enter an optional description explaining what the ranking policy should be used for.
5. Build your ranking policy by adding methods. Click **Add Method**, and select a method:
   - **Boost - Phrase Match**: This method increases the relevance score of items returned by the search request only if the phrase values in the selected asset types match the values assigned below (MT operator is applied).
   - **Boost - Equals**: This method increases the relevance score of items returned by the search request only if the data field values in the selected asset types exactly match the values assigned below (EQ operator is applied).
   - **Pin - Equals**: This method sets the topmost relevance to items returned by the search request only if the data field values in the selected asset types exactly match the values assigned below (EQ operator is applied).

- **Pin - Phrase Match**: This method sets the topmost relevance to items returned by the search request only if the phrase values in the selected asset types match the values assigned below (MT operator is applied).

6. When you're done, click **Save**.

Here are some things to consider when creating a ranking policy:

- If you enter more than one value in your method, the ranking policy will be applied if either value matches the returned item (OR is applied). For example, in an equals method, if you have two values (value-1 and value-2) for a field (field-1), the ranking policy would be applied if `field-1 EQ value-1 OR field-1 EQ value-2`.
- For boost methods, if a returned item matches more than one field in the method or more than one boost method in the ranking policy, the relevance score is boosted (multiplied) for each match. For example, say you have a method with a boost value of 20, and it includes field-1 and field-2. If a returned item matches a value for both field-1 and field-2, the original relevance score would be multiplied by 20 for the field-1 match and then multiplied by 20 again for the field-2 match. Another example, if an item matches method-1 with a boost value of 20 and method-2 with a boost value of 30, the original relevance score would be multiplied by 20 for the method-1 match and then multiplied by 30 for the method-2 match.
- For phrase match methods, the phrase value can appear anywhere in the data field. For example, if you enter a value of "capital city", it will match if the data field value is "The capital city of France is Paris" or "Palermo is the capital city of Sicily".

When the ranking policy is finalized, you must promote it to make it available to be assigned as a *publishing channel* default. If you want to assign the ranking policy as the *global* default, you must first publish the ranking policy.

Boost - Phrase Match Method

The 'boost - phrase match' method increases the relevance score of items returned by the search request only if the phrase values in the selected asset types match the values you enter in the method. (MT operator is applied).

To configure a 'boost - phrase match' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Enter a **Boost Value** between 10 and 100. This determines the amount the relevance score is boosted (multiplied) by.
4. Select an **Asset Type** and **Data Field** to which the method will be applied. Enter a **Weight** between 0 and 10. Items with value matches for this asset type and data field will have their relevance score boosted by the boost value multiplied by the specified weight. For example, say you have a method with a boost value of 20, one field (field-1) with a weight of 10, and another field (field-2) with a weight of 1. Returned items that match field-1, will have their original relevance score multiplied by 20 for the boost value and then multiplied by 10 for the field weight, for a total boost of 200 times the original relevance score. Returned items that match field-2, will have their original relevance score multiplied by 20 for the boost value and then multiplied by 1 (no change) for the field weight, for a total boost of 20 times the original relevance score.

   To apply the method to the standard fields (asset name or description) available in all asset types, select **Any** as the asset type.

5. To add additional data fields, click +, and select the asset type and data field.
6. Enter the values to be matched against the selected data fields. Enter a word or term, and then press Enter to add it.
   The phrase value can appear anywhere in the data field. For example, if you enter a value of "capital city", it will match if the data field says "The capital city of France is Paris" or "Palermo is the capital city of Sicily".

   If you enter more than one value in your method, the ranking policy will be applied if either value matches the returned item (OR is applied). For example, if you have two values (value-1 and value-2) for a field (field-1), the ranking policy would be applied if `field-1 MT value-1 OR field-1 MT value-2`.
7. When you're done, click **Save**.

Boost - Equals Method

The 'boost - equals' method increases the relevance score of items returned by the search request only if the data field values in the selected asset types exactly match the values you enter in the method (EQ operator is applied).

To configure a 'boost - equals' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Enter a **Boost Value** between 10 and 100. This determines the amount the relevance score is boosted (multiplied) by.
4. Select an **Asset Type** and **Data Field** to which the method will be applied. Enter a **Weight** between 0 and 10. Items with value matches for this asset type and data field will have their relevance score boosted by the boost value multiplied by the specified weight.
   For example, say you have a method with a boost value of 20, one field (field-1) with a weight of 10, and another field (field-2) with a weight of 1. Returned items that match field-1, will have their original relevance score multiplied by 20 for the boost value and then multiplied by 10 for the field weight, for a total boost of 200 times the original relevance score. Returned items that match field-2, will have their original relevance score multiplied by 20 for the boost value and then multiplied by 1 (no change) for the field weight, for a total boost of 20 times the original relevance score.

   To apply the method to the standard fields (asset name, description, or published date) available in all asset types, select **Any** as the asset type.

   > **Note:**
   >
   > Large text fields aren't supported for the 'boost - equals' method.

5. To add additional data fields, click +.
6. Enter the values to be matched against the selected data fields.
   - Text values—Enter a word or term, and then press Enter to add it.
   - Numeric values—Enter a numeric value, and then press Enter to add it.

- Data and time values—Click the date box or to select a date, time, and time zone. Enter an offset of 1 or greater and a period of time to create a range to which the boost will be applied. For example, if you select December 1, 2021 and enter an offset of 10 days, returned items will match if their date value is between December 1, 2021 and December 11, 2021.

  To add additional date and time values, click .

If you enter more than one value in your method, the ranking policy will be applied if either value matches the returned item (OR is applied). For example, if you have two values (value-1 and value-2) for a field (field-1), the ranking policy would be applied if `field-1 EQ value-1 OR field-1 EQ value-2`.

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

Decay - Date Method

The 'decay - date' method decreases the relevance score of items that are returned by the search request. An item's relevance score decreases as the selected asset type's date value gets further away from the origin date and offset. The rate of decrease is defined by the specified decay rate and scale.

To configure a 'decay - date' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Enter a **Decay Origin** by clicking the date box or to select a date, time, and time zone. This will be the middle of the date range to which the relevance score will remain unchanged (*no* decrease will be applied).
4. Enter a **Decay Rate** between 0.1 and 1.0. This determines the amount the relevance score is decreased by. For example, if the original relevance score is 10, and your decay rate is 0.5, the fully applied decay rate would decrease the score to 5 (10 x 0.5 = 5).
5. Enter a **Scale** of 0 or greater and a period of time. This determines how rapidly the decrease in relevance score approaches 0. Returned items with values *within* the scale range ('decay origin' - 'offset' - 'scale' to 'decay origin' + 'offset' + 'scale') will have half the decay rate applied. Returned items with values *outside* the scale range will have the full decay rate applied.
6. Enter an **Offset** of 1 or greater and a period of time. This determines the beginning and ending of the date range to which the relevance score will remain unchanged (*no* decrease will be applied). Returned items with values within the offset range ('decay origin' - 'offset' to 'decay origin' + 'offset') will have no decay rate applied.
7. Select an **Asset Type** and **Data Field** to which the method will be applied. Only date type data fields are available for selection.
   To apply the method to the standard field, published date, available in all asset types, select **Any** as the asset type.
8. To add additional data fields, click .
9. When you're done, click **Save**.

Example

Let's say you have a decay method with the following values:

- **Decay Origin:** December 1, 2021
- **Decay Rate:** 0.5
- **Scale:** 1 day
- **Offset:** 10 days

If your returned item has an original relevance score of 10, here's how the decay rate would be applied:

- If the returned item's date is between November 21, 2021 and December 11, 2021 (within the offset range), no decay rate would be applied, and the relevance score would remain 10.
- If the returned item's date is between November 20, 2021 and December 12, 2021 (within the scale range), half the decay rate would be applied. The original relevance score (10) would be decreased by half (0.5) of the decay rate (0.5), making the relevance score decrease by 2.5 (10 x 0.5 x 0.5 = 2.5), so the new relevance score would be 7.5 (10 - 2.5 = 7.5).
- If the returned item's date isn't between November 20, 2021 and December 12, 2021 (outside the scale range) the full decay rate would be applied. The original relevance score (10) would be decreased by the full decay rate (0.5), making the relevance score decrease by 5 (10 x 0.5 = 5), so the new relevance score would be 5 (10 - 5 = 5).

Decay - Numeric Method

The 'decay - numeric' method decreases the relevance score of items that are returned by the search request. An item's relevance score decreases as the selected asset type's numeric value gets further away from the origin and offset. The rate of decrease is defined by the specified decay rate and scale.

To configure a 'decay - numeric' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Enter a **Decay Origin**. This will be the middle of the numeric range to which the relevance score will remain unchanged (*no* decrease will be applied).
4. Enter a **Decay Rate** between 0.1 and 1.0. This determines the amount the relevance score is decreased by. For example, if the original relevance score is 10, and your decay rate is 0.5, the fully applied decay rate would decrease the score to 5 (10 x 0.5 = 5).
5. Enter a **Scale** of 0 or greater. This determines how rapidly the decrease in relevance score approaches 0. Returned items with values *within* the scale range ('decay origin' - 'offset' - 'scale' to 'decay origin' + 'offset' + 'scale') will have half the decay rate applied. Returned items with values *outside* the scale range will have the full decay rate applied.
6. Enter an **Offset** of 1 or greater. This determines the beginning and ending of the numeric range to which the relevance score will remain unchanged (*no* decrease will be applied). Returned items with values within the offset range ('decay origin' - 'offset' to 'decay origin' + 'offset') will have no decay rate applied.
7. Select an **Asset Type** and **Data Field** to which the method will be applied. Only number type data fields are available for selection.

8. To add additional data fields, click +.
9. When you're done, click **Save**.

Example

Let's say you have a decay method with the following values:

- **Decay Origin:** 100
- **Decay Rate:** 0.5
- **Scale:** 1
- **Offset:** 10

If your returned item has an original relevance score of 10, here's how the decay rate would be applied:

- If the returned item's numeric value is between 90 and 110 (within the offset range), no decay rate would be applied, and the relevance score would remain 10.
- If the returned item's numeric value is between 89 and 111 (within the scale range), half the decay rate would be applied. The original relevance score (10) would be decreased by half (0.5) of the decay rate (0.5), making the relevance score decrease by 2.5 (10 x 0.5 x 0.5 = 2.5), so the new relevance score would be 7.5 (10 - 2.5 = 7.5).
- If the returned item's numeric value isn't between 89 and 111 (outside the scale range) the full decay rate would be applied. The original relevance score (10) would be decreased by the full decay rate (0.5), making the relevance score decrease by 5 (10 x 0.5 = 5), so the new relevance score would be 5 (10 - 5 = 5).

Pin - Equals Method

The 'pin - equals' method sets the topmost relevance to items returned by the search request only if the data field values in the selected asset types exactly match the values assigned below (EQ operator is applied).

To configure a 'pin - equals' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Select an **Asset Type** and **Data Field** to which the method will be applied.
   To apply the method to the standard fields (asset name, description, or published date) available in all asset types, select **Any** as the asset type.

   > **Note:**
   >
   > Large text fields aren't supported for the 'pin - equals' method.

4. To add additional data fields, click +.
5. Enter the values to be matched against the selected data fields.
   - Text values—Enter a word or term, and then press ENTER to add it.
   - Numeric values—Enter a numeric value, and then press ENTER to add it.

- Data and time values—Click the date box or to select a date, time, and time zone. Enter an offset of 1 or greater and a period of time to create a range to which the boost will be applied. For example, if you select December 1, 2021 and enter an offset of 10 days, returned items will match if their date value is between December 1, 2021 and December 11, 2021.

  To add additional date and time values, click +.

If you enter more than one value in your method, the ranking policy will be applied if either value matches the returned item (OR is applied). For example, if you have two values (value-1 and value-2) for a field (field-1), the ranking policy would be applied if `field-1 EQ value-1 OR field-1 EQ value-2`.

6. When you're done, click **Save**.

Pin - Phrase Match Method

The 'pin - phrase match' method sets the topmost relevance to items returned by the search request only if the phrase values in the selected asset types match the values assigned below (MT operator is applied).

To configure a 'pin - phrase match' method:

1. Enter a name for the method.
2. Enter an optional description describing what the method does.
3. Select an **Asset Type** and **Data Field** to which the method will be applied.
   To apply the method to the standard fields (asset name or description) available in all asset types, select **Any** as the asset type.
4. To add additional data fields, click +, and select the asset type and data field.
5. Enter the values to be matched against the selected data fields. Enter a word or term, and then press ENTER to add it.
   The phrase value can appear anywhere in the data field. For example, if you enter a value of "capital city", it will match if the data field says "The capital city of France is Paris" or "Palermo is the capital city of Sicily".

   If you enter more than one value in your method, the ranking policy will be applied if either value matches the returned item (OR is applied). For example, if you have two values (value-1 and value-2) for a field (field-1), the ranking policy would be applied if `field-1 MT value-1 OR field-1 MT value-2`.
6. When you're done, click **Save**.

Promote a Ranking Policy

You must promote a ranking policy for it to be available to be assigned to a publishing channel and be used in searches.

To promote a ranking policy:

1. On the Ranking Policies page, select the ranking policy you want to promote, and then click **Promote**.
2. Confirm that you want to promote the ranking policy, and then click **Promote**.

After promoting your ranking policy for the first time, content administrators and repository administrators can then assign it as a *publishing channel* default. If you want to assign the ranking policy as the *global* default and apply the ranking policy to users' searches, you must first publish the ranking policy.

Publish a Ranking Policy

If you want to assign the ranking policy as the global default or apply the ranking policy to users' searches, you must publish the ranking policy.

To publish a ranking policy:

1. On the Ranking Policies page, select the ranking policy you want to publish, and then click **Publish**.
2. Confirm that you want to publish the ranking policy, and then click **Publish**.

Copy a Ranking Policy

You can quickly create a new ranking policy based off an existing one by copying it.

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Select **Ranking Policies** from the drop-down menu.
3. Select the ranking policy you want to copy, and then click **Copy**.
4. Enter a name and optional description for your ranking policy, and then click **Create**.
5. The ranking policy is created with the same configuration as the original policy. Edit the settings, and then click **Save**.

You must promote the ranking policy, and then assign it as the global default or assign it as a publishing channel default in order for it to be used.

Edit a Ranking Policy

As your business changes and your understanding of how your users search your system grows, you can update your ranking policies by creating a new draft version. Changes you make in the draft won't affect the current search rankings. When the updated policy is approved, you can promote the new ranking policy version for use in your organization, and it will be applied to searches. Then you can publish the new version of the ranking policy when you're ready to make the updates public.

To edit a ranking policy:

1. On the Ranking Policies page, select the ranking policy you want to edit, and then click **Edit**.
2. Edit the methods as needed.
3. To view additional information about the ranking policy, click , then, in the drop-down menu, select an option:
   - **Channels:** View the channels to which the ranking policy has been assigned.
   - **Properties:** View the ranking policy properties.

4. When you're done making changes, click **Save**.

Remember to promote the new version of the ranking policy when ready.

Delete a Ranking Policy

You can delete draft or promoted ranking policies. Published ranking policies must be unpublished before you can delete them.

To delete a draft or promoted ranking policy:

1. On the Ranking Policies page, select the ranking policy you want to delete.
2. Click the delete action available for the ranking policy:
   - For a draft ranking policy, click **Delete Draft**.
   - For a promoted ranking policy, click **Delete Promoted**.
   - For a ranking policy that has both draft and promoted versions, click the **Delete** pull-down menu, and select which ranking policy version you want to delete.

To delete a published ranking policy:

- On the Ranking Policies page, select the ranking policy you want to delete and click **Unpublish**. Once unpublished, you can select and delete the promoted ranking policy.

Use Ranking Policies

When a ranking policy is finalized, you must promote it to make it available to be assigned as a *publishing channel* default. If you want to assign the ranking policy as the *global* default, you must first publish the ranking policy. Setting a channel default ranking policy overrides the global default ranking policy.

- Make a Ranking Policy the Global Default
- Assign a Ranking Policy as a Channel Default
- Use a Ranking Policy on a Search Request in REST API for Content Delivery

Make a Ranking Policy the Global Default

The REST API for Content Delivery uses the global default policy to rank search results if there is no ranking policy assigned to the channel being searched or if there is no ranking policy specified via the *rankBy* parameter in the search query.

You must promote and publish the ranking policy before you can assign it as a the global default.

To assign a ranking policy as the global default:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Ranking Policies** from the drop-down list.
3. Select the ranking policy you want to assign as the global default.
4. Click **Set as Global Default**.

The ranking policy displays a "Global Default" tag next to it.

You can change the global default by performing the steps above on a different custom ranking policy. You can also revert to the out-of-the-box ranking policy by selecting the custom ranking policy that is the current global default, then clicking **Remove as Global Default**.

You can also override the global default for a specific publishing channel by assigning a ranking policy as a channel default.

Assign a Ranking Policy as a Channel Default

The REST API for Content Delivery uses the channel default policy to rank search results if there is no ranking policy specified via the *rankBy* parameter in the search query.

You must promote the ranking policy before you can assign it as a channel default.

You can assign a default ranking policy for a publishing channel when you create the channel or you can edit the channel to assign the ranking policy.

To edit a publishing channel to assign a ranking policy as the channel default:

1. Sign in as a content administrator in your browser and click **Content** under Administration in the left navigation menu.
2. Choose **Publishing Channels** from the drop-down list.
3. Open the publishing channel to which you want to assign the ranking policy.
4. Under Search Results Ranking, choose the ranking policy you want to assign as the default and the asset types to which you want to apply the ranking policy.
   - If you set a ranking policy scope, the ranking policy will be applied to results that match the ranking policy rules, but only if the assets are of an asset type selected here.
   - If you don't set a ranking policy scope and a user limits their search to one or more asset types, the ranking policy will be applied to all results that match the ranking policy rules (both standard field rules and user-defined field rules).
   - If you don't set a ranking policy scope and a user doesn't limit their search to an asset type, only the standard field rules in the ranking policy will be used to apply the ranking policy.
5. Click **Save**.

You can also assign a published ranking policy as the global default.

Use a Ranking Policy on a Search Request in REST API for Content Delivery

You can pass in a custom ranking policy as a URL parameter for a search query in the REST API for Content Delivery. Specify the ranking policy by name in the `rankBy` parameter of a search query to the Items endpoint. Using this method overrides the global ranking policy default and any channel default, controlling how matched items are sorted in that search request.

To submit a search query with the `rankBy` parameter in the REST API for Content Delivery, use the following syntax:

```
GET: https://instanceName-accountName.cec.ocp.oraclecloud.com/
content/published/api/v1.1/items?q=(type eq
"TypeName")&rankBy=RankingPolicyName
```

For example:

```
GET: http://instanceName-accountName.cec.ocp.oraclecloud.com/
content/publsihed/api/v1.1/items?q=(type eq
"Blog")&rankBy=BoostPolicy
```

Use the REST APIs to Test Ranking Policy

You'll want to test your ranking policy to make sure it has the desired affect on search results. You can test ranking policies using the REST APIs in the following ways:

- **Draft:** When a ranking policy is in a draft state you can test it using the following method:
  - **rankBy parameter:** Submit a search query to the Items endpoint of the REST API for Content Preview, specifying the ranking policy by name in the rankBy parameter.
    Use the following syntax:

    ```
    GET: https://instanceName-
    accountName.cec.ocp.oraclecloud.com/content/preview/api/
    v1.1/items?q=(type eq
    "TypeName")&rankBy=RankingPolicyName
    ```

    For example:

    ```
    GET: http://myinstance-myaccount.cec.ocp.oraclecloud.com/
    content/preview/api/v1.1/items?q=(type eq
    "Blog")&rankBy=BoostPolicy
    ```

- **Promoted:** When a ranking policy is promoted you can test it using the previous method and the following additional methods:
  - **rankBy parameter:** When a ranking policy is promoted, you can use the rankBy parameter in the REST API for Content Preview or in the REST API for Content Management. Using similar syntax to that shown above, submit a search query to the Items Search endpoint in the REST API for Content Management, replacing `preview` with `management`.
  - **Channel default search:** After assigning the ranking policy as a channel default, you can pass the ChannelToken in the search query. The following channel default search example is for the REST API for Content Management, but you can also test the channel default in the REST API for Content Preview.

    Use the following syntax:

    ```
    GET: https://instanceName-
    accountName.cec.ocp.oraclecloud.com/content/
    management/api/v1.1/items?q=(type eq
    "TypeName")&channelToken=ChannelTokenValue
    ```

    For example:

    ```
    GET: http://myinstance-myaccount.cec.ocp.oraclecloud.com/
    content/management/api/v1.1/items?q=(type eq
    "Blog")&channelToken=MarketingChannel
    ```

- **Published:** When a ranking policy is published you can test it using the previous methods and the following additional methods:
  - **rankBy parameter:** When a ranking policy is published, you can use the rankBy parameter in the REST API for Content Preview, in the REST API for Content Management, or in the REST API for Content Delivery. Using similar syntax to that shown above, submit a search query to the Items endpoint in the REST API for Content Delivery, replacing `preview` with `published`.
  - **Channel default search:** When a ranking policy is published and you assign it as a channel default, you can search the channel in the REST API for Content Preview, in the REST API for Content Management, or in the REST API for Content Delivery. Using similar syntax to that shown above, pass the ChannelToken in the search query, replacing `management` with `published`.
  - **Global default search:** After assigning the ranking policy as the global default, you can test the global default by searching a channel that doesn't have a channel default. The following global default example is for the REST API for Content Delivery, but you can also test the global default in the REST API for Content Preview or the REST API for Content Management.

    Use the following syntax:

    ```
    GET: https://instanceName-accountName.cec.ocp.oraclecloud.com/
    content/published/api/v1.1/items?q=(type eq
    "TypeName")&channelToken=ChannelTokenValue
    ```

    For example:

    ```
    GET: http://myinstance-myaccount.cec.ocp.oraclecloud.com/
    content/published/api/v1.1/items?q=(type eq
    "Blog")&channelToken=MarketingChannel
    ```

View Ranking Policy Properties

The ranking policy properties show information such as when the policy was last updated, promoted, and published; and the API information. You can also view or edit the ranking policy name and description.

To view the properties, open the ranking policy, then click .

Property information is divided into tabs:

- **General**
  - Name and description—You can edit this information.
  - Date and time the ranking policy was last updated and by whom.
  - If the ranking policy has been promoted, you see the last version that was promoted.
  - If the ranking policy has been published, you see that last version that was published and the channels to which it was published.
- **API**
  - API name and ID—To copy the API name or ID to the clipboard, click next to it.
  - Management URL—To copy the management URL to the clipboard, click next to it.

You can also view any publishing channels to which the ranking policy is associated by selecting **Channels** in the panel drop-down menu.

Part V
Appendixes

The following appendices are available:

A
Troubleshoot

Here are some questions you might have when using digital assets.

- I don’t see any asset types
- I see files in my assets list I don’t recognize
- I don’t see the asset or collection I need
- I can’t delete a digital asset
- I can’t delete a publishing channel

I see files in my assets list I don’t recognize

If a collection was shared with you, you’ll see those assets in your asset list.

When you select **Assets** from the navigation menu, you see all assets that you can access. This includes any assets from a collection that was shared with you. You can find the collection where an asset is managed. Double-click on the asset to view the properties of the item. The collection and any tags associated with the asset are displayed.

I don’t see any asset types

Asset types must be associated with a repository and you must have at least the contributor role on the repository in order for you to use them to create an asset.

Asset types can be created by anyone who has a content administrator role. After the asset type is created, it must be associated with a repository for it to be used to create an asset. If you expect to see an asset type but don’t see it in the list when you try to add a digital asset or create a content item, contact your content administrator.

I don’t see the asset or collection I need

Your asset view and collection list shows those items you can access.

A collection can be associated with a website or it can be an independent collection, like one created for a project or event. A collection that’s associated with a site is also associated with the repository that was chosen when the site was created. Check to make sure you are looking in the right repository when you view a collection list.

All users can view a collection when filtering assets, but you can only see those collections you can manage in the collection list. If you don’t see a collection listed when you click **Collections**, you don’t have a manager role for that collection.

I can’t delete a digital asset

The **Delete** option may not appear when you select a digital asset.

Assets that are published cannot be deleted because they may be in use. You may also not have the appropriate role needed to delete an asset. For example, if you have a Viewer role in a repository, you’re limited in what you can do with assets.

I can’t delete a publishing channel

Publishing channels can be created using the administration options on the navigation menu, or they can be created when a site is created.

You can delete a publishing channel that does not have any published assets. If assets have been published, you can’t delete the channel. You also can’t delete a publishing channel that was created when a site was created. You must delete the site to delete that kind of channel.

I don’t see performance data for an asset

If your system administrator has enabled consumption analytics for your instance or your site administrator has enabled site-level consumption analytics , you should be able to view performance data for the asset. There are several reasons you might not see this data:

- The asset must be published. Performance data shows the number of times the asset has been viewed or accessed by a user through a particular channel (like a site or portal), so if the asset hasn't been published, it won't be available for users to view or access.
- The asset must be published to a channel that collects data. For example, a site administrator can disable consumption analytics for a particular site, and therefore no data will be collected even though the asset is published and users can view or access the asset.

B

Icon Quick Reference

Here's a quick look at the icons you might see in on the Assets page.

Icons in the Assets Toolbar

Icon	Meaning
•••	Click to see addition options such as Scheduled Publishing, Publishing Jobs, Translation Jobs, Collections, Content Analytics, Archived Assets, and Workflow Tasks.
	Click to open the sidebar to view additional information about the selected assets such as categories, channels, properties (including activity and previous versions), tags and collections, and workflows.

Icons in the Assets Actions Bar

Icon	Meaning
	Click to open the selected asset.
	Click to view the selected asset.
	Click to edit the selected content item.
	Click to upload a new version of the selected digital asset.
	Click to download a selected asset and store it for use on your local computer.
	Click to copy the selected content items.
	Click to copy the selected assets to another repository.
	Click to delete the selected assets.
(on the right)	Click to change how you view the items on the page, such as in a list or grid.

Icons in the Asset Tiles

Icon	Meaning
Status icons	The asset's status is shown below the asset preview: • Published (asset repositories only) • Approved • Rejected • Draft • Translated (asset repositories only) • In Review
	Signifies that the asset has been recategorized. You must publish the asset for the category changes to appear in publishing channels.
	Signifies that the asset is scheduled to be published.
	Signifies that the asset is locked.
	View the associated conversation.

Icons in the Recommendations Actions Bar

Icon	Meaning
	Click to view the selected recommendation.
	Click to edit the selected recommendation.
	Click to delete the selected recommendations.