Oracle® Fusion Middleware
WebCenter Sites Help

12c (12.2.1.4.0)
E95318-01
September 2019

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Preface

Oracle WebCenter Sites enables organizations to create websites with an exceptional digital experience through agility in content creation, effective visitor engagement, and realtime publishing features. It provides marketers intuitive and easy to use features like drag and drop style page building, A/B testing, enhanced content analytics, visitor profile management, and delivery across platforms.

Audience

This document is intended for end users who are using the Oracle WebCenter Sites user interface to create websites.

Documentation Accessibility

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

Access to Oracle Support

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

Product Accessibility

The Oracle WebCenter Sites Contributor interface uses high contrast mode when this option is selected in supported operating systems.

In the Contributor interface, whenever you select a button or label, it is highlighted with a green dotted border to show visual and physical focus.

For information about keyboard shortcuts for the Oracle WebCenter Sites: Contributor interface, see Keyboard Shortcuts for the Contributor Interface.

Related Documents

See the following documents in the Oracle WebCenter Sites documentation set:

- *Oracle WebCenter Sites Release Notes*
- *Using Oracle WebCenter Sites*
- *Administering Oracle WebCenter Sites*

- *Developing with Oracle WebCenter Sites*

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 on the screen, or text that you enter.

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WebCenter Sites Help

What's New?

Using WebCenter Sites

- Quick Tour of the Contributor Interface
- Navigational Reference
- Workspace: Home Tab
- How do I create an asset in Form View?
- How do I edit assets in Form View?
- How do I assign ratings to an asset?
- How do I assign start and end dates?
- How do I set or change an asset's locale designation?
- How do I create vanity URLS for assets?
- How do I check out assets?
- How do I check in assets?
- How do I create an asset in Web View?
- How do I edit assets in Web View?
- How do I create Sites segments?
- How do I create Bluekai segments?
- How do I publish an approved asset?
- How do I find and organize assets?

Developing WebCenter Sites

- About the AssetMaker Utility
- About Designing Flex Asset Types
- Registering a New Proxy Asset Type
- How to Prioritize Device Groups
- About Device Repository
- Name and Describe the Template Asset
- Configure the Template's Element
- Configure SiteEntry
- Create a Thumbnail (Optional)
- Configure the Map
- Name and Describe the CSElement Asset

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What's New?

◀ WebCenter Sites Help

To see the new features and enhancements in the latest release and previous releases, see *What's New for Oracle WebCenter Sites*.

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Quick Tour of the Contributor Interface

◀ WebCenter Sites Help

A quick tour of the Oracle WebCenter Sites: Contributor interface will take you 15 minutes.

For information about exploring the Contributor interface, see these sections:

- About this Quick Tour
- Prerequisites for the Quick Tour
- How do I use the Contributor Interface?
- How do I switch to a different site?

About This Quick Tour

This quick tour is for new WebCenter Sites users who want to familiarize themselves with WebCenter Sites and its Contributor interface. In this quick tour, you will be using the default `demo` user (password: `demo`) to access each interface. Logging in to WebCenter Sites as the `demo` user grants you access to the Contributor interface and all the content management functions to which a user might have permissions.

> ✏️ **Note:**
>
> In reality, access to the Contributor interfaces is focused on certain tasks such as creating or editing content.

To follow along with this quick tour, you can either perform the steps provided in each section in the order in which the topics are presented or you can navigate directly to the task you are interested in learning about.

Prerequisites for the Quick Tour

To follow along with the procedures in this quick tour, the avisports and FirstSite II sample sites must be installed with your WebCenter Sites system. If no sample sites are installed, contact your WebCenter Sites administrator.

For more information, see "What Sample Sites Are Used in This Guide" in *Using Oracle WebCenter Sites.*

The final procedure in this Quick Tour is to approve and publish the page. You will be able to publish the page manually only if an administrator has configured a publishing event for the destination to which you approve the assets.

For more information, see "Approve and Publish the Page" in *Using Oracle WebCenter Sites.*

How do I use the Contributor Interface?

To orient yourself in the Contributor interface take a quick tour of these topics in *Using Oracle WebCenter Sites:*

- Familiarize Yourself with the Contributor Interface

- Organize Your Dashboard

- Explore the Trees in the Navigation Pane

- Create an Asset

- Switch Between Web View and Form View

- Preview the Asset

- Find and Open an Asset

- Edit the Asset in Web View

- Edit the Asset in Form View

- Work With the Asseti in the Context of a Mobile Device

- Create a Page Asset and Associate Your Quick Tour Asset With It

- Include the Page in a Site Navigation

- Approve and Publish the Page

How do I switch to a different site?

Now that you have finished touring the Contributor interface, switch to a different site to which you have permissions.

- If the applications bar is not open, click the **down-arrow**, located on the right of the menu bar, to open it.

- In the **Site** list, select the site you want to access.

WebCenter Sites logs you in to the selected site. If this is the first time you are accessing the site, you must select the application with which you want to work. Otherwise, the application with which you last worked while logged into this site opens.

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Navigational Reference

◄ WebCenter Sites Help

You navigate through Oracle WebCenter Sites: Contributor using the components of its interface.

For information about the most commonly used components of the Oracle WebCenter Sites: Contributor interface, see these sections:

- Menu Bar
- Navigation Pane
- Workspace: Home Tab
- Workspace: Asset Tab
- Search and Browse Tabs
- Split View: Asset Tab and Search Results List

Menu Bar

The menu bar contains the following options:

- **Content**: Opens a menu containing options to manage the assets you are currently working with. These include the options for creating an asset, saving an asset, approving an asset for publishing, bookmarking an asset, sharing an asset to another site, and setting access permissions for a specific asset.

- **Edit**: Opens a menu containing content management tools to inspect, modify, copy, and delete an asset. This menu also allows you to change the layout (template) assigned to an asset and work with revision tracking.

- **View**: Opens a menu containing tools to view an asset in either Form View or Web View and options for previewing an asset in different ways, such as previewing an asset using a different layout (template) or site wrapper, or previewing an asset in a separate browser window. This menu also contains an option to view an asset's status summary form, which contains information about the asset's workflow and approval status.

- **Down-arrow** icon: Click this icon to open the applications bar. When you first log in to WebCenter Sites, the applications bar is open, in which case you see an **up-arrow** icon which you can click to close the applications bar. The applications bar contains the following:

  – Up to five of your most recently used applications. You can switch to a different application for which you have permissions without having to log back in to WebCenter Sites.

    If you have permissions to access the Admin interface, the **Admin** application icon is available in the applications bar. Clicking this icon opens the Admin interface.

  – Your **user name**, which you can click to manage your profile.

- – **Sites** drop-down menu, which enables you to switch to a different site to which you have permissions.
- – **Logout** button, which ends your session and logs you out of WebCenter Sites.

Navigation Pane

The navigation pane is located on the left of the Contributor interface.

> **Note:**
>
> Drag the right edge of the navigation pane to adjust the pane's width. To hide the navigation pane, click the **Hide Tree Navigation** bar, located on the right edge of the navigation pane.

The navigation pane contains the following sections:

- • **Site Tree**: Provides a hierarchical view of the way the pages on your websites are organized. Pages can be placed in a hierarchy under a site plan (which represents the navigation of a website) or *unplaced* (the page is not part of a site plan). There can be multiple site plans contained within a single CM site.

- • **Content Tree**: Shows the asset types and flex relationship hierarchies available in the current site. Double-click a parent asset to open a **Browse** tab, and view the associated child assets.

- • **My Work** tree: Allows you to keep track of your workload. The My Work tree contains the **Bookmarks** and **History** nodes, as follows:

  - – **Bookmarks**: Returns a list of assets that you have bookmarked. Bookmarked assets are also listed in the **Bookmarks** widget on the dashboard (located in the **Home** tab).

  - – **History**: Returns a list of assets you have worked on during the current session in the current site. This list is cleared every time you log out of WebCenter Sites.

  > **Note:**
  >
  > The **My Work** tree is used only for managing and organizing your work. You cannot use the **My Work** tree to group assets for delivery purposes.

- • **Marketing Tree**: Shows the assets available for marketing and analyzing on your website such as segments, recommendations, promotions and assets associated with A/B Tests.

Workspace Home Tab

The workspace is at the center of the Contributor interface. The **Home** tab is the first tab you see when you first log in to the Contributor interface. This tab contains your dashboard.

> **✏ Note:**
>
> You can return to the **Home** tab at any time by clicking the **Home** tab. The **Home** tab cannot be closed.

The dashboard may look different from user to user. This is because your dashboard only displays information pertaining to you. You can even reposition the widgets on your dashboard by dragging and dropping the widgets into a different location on the dashboard. The following provides information about the widgets on your dashboard:

- **Bookmarks**: When you bookmark an asset for easy retrieval at a future time, the asset is accessible from this widget. Bookmarked assets are also accessible from the **Bookmarks** node in the **My Work** tree.

- **Saved Searches**: A Saved Search is search criteria that you have saved to use on a later date. This widget lists all of the search criteria you have saved as a Saved Search and all of the Saved Searches other WebCenter Sites users have shared with the role(s) you are assigned.

- **Assignments**: Provides a summary of your present workload in the current site. From this widget you can access an asset that has been assigned to you during its workflow process and finish your assignments.

- **Checkouts**: Provides a summary of the assets that are presently checked out to you.

Workspace Asset Tab

When you log in and access an asset, a tab opens in the workspace displaying the asset in either Form View or Web View. Depending on whether you are creating, editing, or inspecting the asset determines the view in which the tab displays the asset. The workspace has no limit to the number of tabs that can be open at one time.

Search and Browse Tabs

The **Search** tab opens when you conduct a search or advanced search in the Contributor interface. It displays a list of assets matching your search criteria.

The **Search** tab consists of the following components:

- **Search toolbar**: Enables you to approve, bookmark, and delete assets listed in the **Search** tab, and refresh the search results list.

- **Search list options bar**: Enables you to dock the search results list to the right of your workspace, save the search criteria you used to conduct the search, and toggle the search results list between thumbnail view and list view. This bar also provides search query tips.

  If the search results list is docked to the right of the workspace, you see a **Sort** menu that enables you to sort the results of your search.

- **Search results list**: Displays a list of assets matching your search criteria. Clicking an asset's name in the list opens a tab displaying that asset's Inspect view. Right-clicking an asset's name in the list displays a context menu for that asset containing content management options you can perform.

The **Browse** tab opens when you double-click one of the following:

- The **Bookmarks** node in the **My Work** tree – the **Browse** tab opens displaying a list of bookmarked assets.
- A parent asset in the **Content Tree** – the **Browse** tab opens displaying a list of children belonging to the parent.

The **Browse** tab consists of the same components as the **Search** tab (with the exception of the **Save Search** option).

Split View Asset Tab and Search Results List

The first time you search for an asset after logging in, the list of returned assets fills the workspace in a **Search** tab. When you click an asset in the list, a separate tab opens in the workspace and displays the asset you selected. If you switch back to the **Search** tab and click **Dock**, the search results are docked to the right of the tab displaying the asset (Split View). This enables you to view the asset and the search results list simultaneously.

> ⑨ **Tip:**
>
> When you have an asset open in its Edit view and you perform a search, the search results list is automatically docked to the right of the asset's tab.

- To see the search results in a **Search** tab, click **Undock** in the search results pane.
- To close the search results list, click the **X** icon.

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Workspace: Home Tab

◀ WebCenter Sites Help

The workspace is at the center of the Contributor interface. The **Home** tab is the first tab you see when you first log in to the Contributor interface. This tab contains your dashboard.

> ✎ **Note:**
>
> You can return to the **Home** tab at any time by clicking the **Home** tab. The **Home** tab cannot be closed.

The dashboard may look different from user to user. This is because your dashboard only displays information pertaining to you. You can even reposition the widgets on your dashboard by dragging and dropping the widgets into a different location on the dashboard. The following provides information about the widgets on your dashboard:

- **Bookmarks**: When you bookmark an asset for easy retrieval at a future time, the asset is accessible from this widget. Bookmarked assets are also accessible from the **Bookmarks** node in the **My Work** tree.

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- **Assignments**: Provides a summary of your present workload in the current site. From this widget you can access an asset that has been assigned to you during its workflow process and finish your assignments.

- **Checkouts**: Provides a summary of the assets that are presently checked out to you.

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How do I create an asset in Form View?

◀ WebCenter Sites Help

To create an asset in Form View:

1. From the Contributor interface, select the site in which you want to create the asset.

2. In the menu bar, select **Content**, select **New**, then select the type of asset you want to create.

3. If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, a tab opens displaying the Choose Assignees form.

   Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process.

   A tab opens and shows the asset's Create view as a content entry form.

4. In the asset's Create view, in the **Name** field, enter a name for the asset. Note the following conventions when naming the asset:

   - The name must contain alphanumeric characters. The maximum character limit in the **Name** field is 64 bytes. Characters that exceed 64 bytes get truncated and a message stating this is displayed.

   - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), greater-than sign (>) and backslash (\).

   - The name can contain spaces, but cannot start with a space.

5. Fill in the asset's content entry form. When populating the form, take note of the following:

   - **Required fields.** You must fill in all required fields (marked with an asterisk) before you are permitted to save the asset. Fill in all other fields as necessary.

   - **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled by a WYSIWYG editor, such as CKEditor. These text fields allow you to enter and format your content using controls similar to those of Microsoft Word.

     To work in a CKEditor-enabled field, click in the field to load CKEditor.

   - **Date fields.** You may see one or more fields that allow you to select a date.

     Click the **Pick a date** icon to open the Date Picker attribute editor.

   - **Image Picker fields.** You may see one or more fields that prompt you to select an image asset (to be associated with the asset you are creating) through the Image Picker attribute editor. In such cases, you see a **Browse** button under a Drop Zone.

Click **Browse** to open the Image Picker to the right of the tab displaying the asset. The Image Picker shows either names or thumbnails of the image assets from which you can select.

- **Clarkii Online Image Editor fields.** You may see one or more fields that allow you to edit images directly in the asset form, using Clarkii OIE.

- **Type Ahead fields.** You may see one or more fields that display the text "Type Ahead" within a drop-down list.

  To populate this field with an asset, you can either start typing the name of the asset you want to place into the field or use the drop-down list to select the asset. Your developers determine the type of assets this field supports.

- **Upload fields.** You may see one or more fields that enable you to upload an image file from your local computer.

  To populate fields such as this, click the **Browse** button to upload an image file from your local computer.

- **Asset association fields.** You may see one or more fields that display a Drop Zone. These fields support drag and drop functionality and prompt you to select an asset, from the **Content Tree**, **My Work** tree, or a search results list, and drop the asset into the association field.

  When you hover an asset of an accepted type over the field, a green border is shown around the field.

  WebCenter Sites links the asset you dropped into the association field to the asset you are working with. The association field displays the name of the associated asset.

6. In the **Tags** field, enter a single word or short phrase to attach to the asset.

7. Select the next section in the form section selector and fill in the fields as outlined in step 5. Continue until you have populated all required fields (marked with an asterisk). Populate other form sections as necessary.

8. If you plan to create translations of the asset, or if you are required to specify the language of the content you create, select the asset's target language in the **Locale** drop-down list (located in the **Metadata** section of the form).

9. If you want to create a vanity URL for the asset, select the **URL** section of the form. In the **URL** field, specify a vanity URL for the asset.

10. To save the asset, do one of the following:

    - In the asset's toolbar, click the **Save** icon.

    - In the menu bar, select **Content**, then select **Save**.

    WebCenter Sites saves the asset to the database, unless:

    - You have left out one or more required fields in one or more sections

    - An entry or selection you have made in one or more sections is not permitted

    If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors, then save the asset.

11. To inspect the asset, do one of the following:

    - In the asset's toolbar, click the **Inspect** icon.

    - In the menu bar, select **Edit**, then select **Inspect**.

The tab shows the asset's Inspect view in Form View. When you Inspect an asset, you cannot modify its content.

12. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process.

13. To preview the asset, click the **Preview** icon in the asset's toolbar.

    If the asset does not have a template assigned to it, the Select Layout dialog opens. Select a layout and click **Apply**.

    The preview of the asset opens in the tab.

    If you want to make additional changes to the asset, do the following:

    • In the asset's toolbar, click the **Go Back** icon.

    • In the asset's toolbar, click the **Edit** icon.

    The Edit view of the asset opens in the tab.

14. When you are finished working with the asset, save the asset and close the tab. In the menu bar, select **Content**, then select **Save & Close**.

    WebCenter Sites saves the asset and closes the tab displaying the asset.

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How do I edit assets in Form View?

◀ WebCenter Sites Help

If the asset type is configured such that all assets of that type open in Form View, a tab opens displaying the content entry form of the asset. In Form View, you can edit an asset's content by modifying or replacing the information displayed in the fields of the asset's content entry form.

1. From the Contributor interface, select the site containing the asset you want to edit.

2. Find and open the asset.

3. Access the asset's Edit view in Form View:

   • If the asset opens in Web View, switch to Form View. In the asset's toolbar, click the **Mode** switch.

   • In the asset's toolbar, click the **Edit** icon.

     The tab displays the asset's Edit view in Form View.

4. Make changes to the asset's content. For details on filling the fields, see Creating an Asset in Form View.

5. Save the asset. Do one of the following:

   • In the asset's toolbar, click the **Save** icon.

   • In the menu bar, select **Content**, then select **Save**.

   WebCenter Sites saves the asset to the database, unless:

   • You have left out one or more required fields in one or more sections.

   • An entry or selection you have made in one or more sections is not permitted.

   If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors, then save the asset.

6. Inspect the asset. Do one of the following:

   • In the asset's toolbar, click the **Inspect** icon.

   • In the menu bar, select **Edit**, then select **Inspect**.

   The tab displays the Inspect view of the asset in Form View. When you Inspect an asset, you cannot edit its content.

7. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process.

8. Preview the asset:

   • In the asset's toolbar, click the **Preview** icon.

   • If the asset is not assigned a template, the Select Layout dialog opens. Select a layout and click **Apply**.

     The tab shows the preview of the asset.

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How do I assign ratings to an asset?

◀ WebCenter Sites Help

You can assign ratings to individual flex assets or to flex parents. However, you should use parents to assign ratings, for the following reasons:

- To easily manage the ratings for multiple assets, those assets should reside in groups. In fact, you should create flex parents whose sole purpose is to assign ratings to child assets. You can make all of the assets that have identical rating conditions children of the same parent. Then, you can modify the ratings for all the child assets by making a single change.

- Comparing the ratings for one group of assets to the ratings of another group is easier than comparing the ratings of individual assets.

- Ratings are calculated more quickly because fewer assets with individual ratings exist; this speeds up system performance.

To assign ratings to an asset:

1. From the Contributor interface, select the site containing the asset to which you want to assign ratings.

2. Find the flex asset or flex parent you want to assign ratings to and open its Edit view:

   a. In the **Search** field, enter your search criteria (if any).

   b. To narrow your search down to a specific type of asset, in the **Search** field, click the **down-arrow** to render the **Search Type** drop-down box, then select the asset type to which you want to limit your search.

   c. Click the **magnifying glass** button.

   d. In the search results list, right-click the asset and select **Edit**.

3. In the asset's Edit view, select the **Marketing** section and navigate to the **Ratings** field.

   This field lists all the segments that have been created for this site.

4. Using a range of 0 through 100 (100 is the highest value), rate this asset for the segments in the list:

   - Enter a value in a segment's **In Segment** column to rate the asset for members of this segment.

   - Enter a value in a segment's **Out of Segment** column to rate the asset for visitors who are not members of this segment.

   - Enter a value in the **no segment ratings apply** field to assign an intrinsic rating to the asset; this rating is used when no segments are defined or the asset is assigned to a recommendation that does not recognize segments (List mode Static Lists recommendation).

5. Save the asset, by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

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How do I assign start and end dates?

WebCenter Sites Help

To assign start and end dates:

1. From the Contributor interface, select the site containing the asset to which you want to assign a date range.

2. Find the asset to which you are assigning a start date, or end date, or both.

3. Edit the asset in Form View.

4. In the asset's form section selector, select **Metadata**.

5. In the **Metadata** section, set the asset's start date, or end date, or both and (optionally) time.

   In the **Start Date** and **End Date** fields, select a date and time from the date picker by clicking the **Pick a date** icon next to each field.

   > **Note:**
   >
   > Your administrator may have selected default start and end dates for this asset type. You can change the settings if you want.

6. In the asset's toolbar, click the **Save** icon to update the asset.

10

How do I set or change an asset's locale designation?

◀ *WebCenter Sites Help*

Before you can create a translation of an asset, the asset must have a locale designation assigned to it. (Typically, you assign the locale designation when you create an asset.)

To create a translation of an asset that has no locale designation, follow the steps below, then continue on to *"Creating a Translation of an Asset"*.

You can also change the locale designation of an asset that has one assigned to it, if necessary. For example, if the administrator decides to further divide the asset's locale (such as dividing French into Canadian French and Belgian French) you can update your assets to use the new locale designations.

> ✎ **Note:**
>
> You can only assign locales that have been enabled on your site by the WebCenter Sites administrator.

To set or change an asset's locale designation:

1. From the Contributor interface, select the site containing the asset whose locale designation you want to set or change.

2. Find and open the asset.

    A tab opens displaying the Inspect view of the asset (in either Form View or Web View).

3. Set or change the asset's locale designation:

    -   If the asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.

    -   In the asset's toolbar, click the **Edit** icon.

    -   Switch to the **Metadata** section of the form by clicking **Metadata** in the form section selector.

    -   In the **Locale** drop-down list, select a locale.

4. In the asset's toolbar, click the **Save** icon.

    The asset is now assigned to the selected locale.

5. Inspect the asset. Do one of the following:

    -   In the asset's toolbar, click the **Inspect** icon.

    -   In the menu bar, select **Edit**, then select **Inspect**.

The tab displays the Inspect view of the asset in Form View. When you inspect an asset, you cannot modify its content.

6. If your next step is to create a translation of the asset, proceed to *"Creating a Translation of an Asset"*.

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How do I create vanity URLS for assets?

◀ WebCenter Sites Help

The **URL** section of an asset's form contains the **URL** field, which you use to define one or more vanity URLs for the asset.

To create a vanity URL for an asset:

1. From the Contributor interface, select the site containing the asset for which you want to create a vanity URL.

2. Find and open the asset for which you want to create a vanity URL. Do one of the following:

   • Search for and open the asset for which you want to create a vanity URL.

   • If you previously bookmarked the asset, open it from the **Bookmarks** node in the **My Work** tree.

   A tab opens displaying the Inspect view of the asset (in either Form View or Web View).

3. Access the asset's Edit view in Form View:

   • If the asset opens in Web View, switch to Form View. In the asset's toolbar, click the **Mode** switch.

   • In the asset's toolbar, click the **Edit** icon.

   The tab shows the Edit view of the asset in Form View.

4. In the form section selector, select **URL**.

   The **URL** section of the form opens.

5. Create a new vanity URL for the asset by filling in the following fields and clicking **Add**:

   • **URL**: Enter a path for the vanity URL you are creating for the asset. For example, `skiing/article`.

   > ✎ **Note:**
   >
   > You must create a unique path for the vanity URL. WebCenter Sites does not allow different assets to share the same vanity URL path.

   • **Host**: This field is shown only if your administrator or developers configured a root (base) URL for assets of this type in the Admin interface. Use this field to select the root (base) URL.

   • **Device Group**: If your site is configured to support device groups, select a device group to designate this vanity URL as the URL to use when a visitor accesses the asset from a mobile device associated with the selected device group.

- **Template**: Select the layout with which to render the asset on the website.

  If your developers have defined arguments for the template you selected, those arguments are displayed to the right of the **Template** field. Select or enter values for the arguments.

- **Wrapper**: This field is shown only if your site has a wrapper. Select the wrapper for your site.

The vanity URL is added to the table at the bottom of the form.

6. Save the asset by doing one of the following:

   - In the asset's toolbar, click the **Save** icon.

   - In the menu bar, select **Content**, then select **Save**.

7. Preview the asset in a new window. In the menu bar, select **View**, then select **Preview in New Window**.

   If the template that is rendering the preview of the asset matches the template selected for the vanity URL, the browser's address bar shows that the vanity URL you created is rendering the preview of the asset.

8. Approve the asset for publishing.

   When the asset is published, the vanity URL that you defined for that asset is used to render it on the website.

12

How do I check out assets?

◀ WebCenter Sites Help

For information about how to manually check out an asset displayed in Form View and Web View, see the following sections:

> **✎ Note:**
>
> If the asset is checked out to another user, when you try to edit the asset or check the asset out, you receive an error message.

- How do I check out an asset in Form View?
- How do I check out an asset in Web View?

How do I check out an asset in Form View?

To check out an asset in form View:

1. From the Contributor interface, select the site containing the asset you want to check out.

2. Find the asset you want to check out. For instructions on finding assets, see Finding and Organizing Assets.

   A tab opens displaying the results of your search.

3. In the search results list, click the name of the asset you want to check out.

   A tab opens displaying the Inspect view of the asset (in either Form View or Web View).

4. If the asset opens in Web View, click the **Mode** switch on the asset's toolbar to switch to Form View.

5. In the asset's toolbar, click the **Check Out** icon.

   WebCenter Sites checks the asset out to you.

How do I check out an asset in Web View?

When you check out an asset while it is displayed in Web View, you also see revision tracking details for all of its associated assets.

1. From the Contributor interface, select the site containing the asset you want to check out.

2. Find the asset you want to check out.

   A tab opens displaying the results of your search.

3. In the search results list, click the name of the asset you want to check out.

A tab opens displaying the Inspect view of the asset (in either Form View or Web View).

4. If the asset opens in Form View, click the **Mode** switch on the asset's toolbar to switch to Web View.

5. In the asset's toolbar, click the Checkin/Checkout icon.

   The tab displays the Asset to be checked in table. This table contains revision tracking details about the primary asset (asset you opened in Web View) and all of its associated assets (assets displayed in the primary asset's web page view).

   The revision tracking action (if any) you can perform on these assets is indicated in the Action column of the asset's row.

   > **Note:**
   >
   > If the asset is not revision tracked, then the Action column for that asset's row is empty and the Detail column for that asset's row displays the message *Not Tracked*.

6. In the table, select (**Ctrl**+click) the assets you want to check out and then click the **Checkout** button. You can also check assets out one at a time by clicking the **Checkout** link in the Action column of the asset's row.

   WebCenter Sites checks the assets out to you.

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How do I check in assets?

◀ WebCenter Sites Help

For information about how to check in an asset displayed in Form View and Web View see the following sections:

> **Note:**
>
> Checking an asset in creates a new version of the asset and makes it available to other users who have permissions to work with the asset.

• How do I check in an asset displayed in Form View?

• How do I check in an asset displayed in Web View?

How do I check in an asset displayed in Form View?

To check in an asset displayed in form View:

1. From the Contributor interface, select the site containing the asset you want to check in.

2. Navigate to the Checkouts widget on your dashboard (located in the **Home** tab), and click the asset's name.

   A tab opens displaying the asset's Inspect view in either Form View or Web View.

3. If the asset opens in Web View, click the **Mode** switch in the asset's toolbar to switch to Form View.

4. In the asset's toolbar, click the **Checkin** icon.

   The tab displays the Assets to be checked in table, which contains the asset's revision tracking details.

5. Ensure the row containing the asset is selected, then click the **Checkin** button.

6. In the **Comment** field, enter comments or instructions that pertain to the version you are checking in. The comments you enter here are displayed in the asset's revision history. If you are checking in multiple assets, the comment you enter applies to all assets you are checking in.

7. To create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.

8. Click **Checkin**.

   WebCenter Sites checks the asset in to the database.

How do I check in an asset displayed in Web View?

When you check in an asset while it is displayed in Web View, you also see revision tracking details for all of its associated assets.

1. From the Contributor interface, select the site containing the asset you want to check in.

2. Navigate to the Checkouts widget on your dashboard (located in the Home tab), and click the asset's name.

   A tab opens displaying the asset's Inspect view in either Form View or Web View.

3. If the asset opens in Form View, click the **Mode** switch on the asset's toolbar to switch to Web View.

4. In the asset's toolbar, click the **Checkin/Checkout** icon.

   The tab displays the Asset to be checked in table which contains revision tracking details about the primary asset (asset you opened in Web View) and all of its associated assets (assets displayed in the primary asset's web page view).

   The revision tracking action (if any) you can perform on an asset is indicated in the Action column of the asset's row.

   > **Note:**
   >
   > If the asset is not revision tracked, then the Action column for that asset's row is empty and the Detail column for that asset's row displays the message *Not Tracked*.

5. In the revision tracking detail table, select (**Ctrl**+click) the assets you want to check in and then click the **Checkin** button. You can also check assets in one at a time by clicking the **Checkin** link in the Action column of the asset's row.

6. In the **Comment** field, enter comments or instructions that pertain to the version you are checking in. The comments you enter here are displayed in the asset's revision history. If you are checking in multiple assets, the comment you enter applies to all assets you are checking in.

7. To create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.

8. Click **Checkin**.

   WebCenter Sites checks the selected assets back in to the database.

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How do I create an asset in Web View?

◀ WebCenter Sites Help

To create an asset in Web View:

1. From the Contributor interface, select the site in which you want to create the asset.

2. In the menu bar, select **Content**, select **New**, then select the type of asset you want to create.

3. In the **Select Layout** field of the Create *Asset* dialog, select the layout you want to assign to the asset.

   The layout you select determines how the asset's Create view opens in Web View.

4. In the **Name** field, enter a name for the asset. Keep in mind the following:

   • The name must contain alphanumeric characters. The maximum character limit in the **Name** field is 64 bytes. Characters that exceed 64 bytes get truncated and a message stating this is displayed.

   • The following characters are not allowed: single quote (;), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), greater-than sign (>), and backslash (\).

   • The name can contain spaces, but cannot start with a space.

5. Click **Continue**.

   > ✎ **Note:**
   >
   > If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, the Choose Assignees dialog opens.
   >
   > Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process.

   A new tab opens displaying the asset's Create view in Web View.

6. Point to the different areas of the asset's Create view to determine which areas accept content.

   Areas that support drag and drop functionality and other content management actions become highlighted when you point to them.

7. Click the highlighted areas to determine the type of content each area supports. The types of editable areas you see and how those areas are displayed in the asset's web page view are determined by how your developers have coded the asset's web page layout (template).

8. Populate the asset's Create view.

9. If the web page layout (template) assigned to the asset you are creating is not coded to display certain fields in Web View, (for example, **Date** and **Locale** fields), then those fields are only available in Form View. To populate these fields, you must switch to Form View.

10. To save the asset, do one of the following:

    - In the asset's toolbar, click the **Save** icon.

    - In the menu bar, select **Content**, then select **Save**.

    WebCenter Sites saves the asset to the database, unless:

    - You have left out one or more required fields.

    - An entry or selection you have made in one or more of the fields is not permitted.

    If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors and save the asset.

11. Inspect the asset. Do one of the following:

    - In the asset's toolbar, click the **Inspect** icon.

    - In the menu bar, select **Edit**, then select **Inspect**.

    The tab displays the asset's Inspect view in Web View. You cannot modify the asset's content when the asset opens in the Inspect view.

12. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process.

13. To preview the asset, click the **Preview** icon in the asset's toolbar.

    The tab displays the preview of the asset.
    To make additional changes to the asset, do the following:

    - In the asset's toolbar, click the **Go Back** icon.

      The tab displays the Inspect view of the asset.

    - In the asset's toolbar, click the **Edit** icon.

      The tab displays the Edit view of the asset.

14. When you are finished working with the asset, save and close it. In the menu bar, select **Content**, then select **Save & Close**.

    WebCenter Sites saves the asset and closes the tab displaying the asset.

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How do I edit assets in Web View?

◀ WebCenter Sites Help

To edit assets in Web View, see the following sections:

- How do I edit the content of an asset in Web View?
- How do I change Web Page Layout?
- How do I change Content Layout?
- How do I edit associations?

How do I edit the content of an asset in Web View?

Web View offers in-context editing, which means you can edit the content of an asset directly in its web page view. How the asset's web page layout (template) code is written determines the areas you can edit in Web View. Certain fields (such as **Date** and **Locale** fields) may only be accessible when working with an asset in Form View. Therefore, to edit the content of these fields you must switch to Form View.

To edit the content of an asset in Web View:

1. From the Contributor interface, select the site containing the asset you want to edit.

2. Find and open the asset.

3. If the asset opens in Form View, switch to Web View.

   - In the asset's toolbar, click the **Mode** switch.

   - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

     The tab re-displays the asset's Inspect view in Web View.

4. Edit the asset:

   - In the asset's toolbar, click the **Edit** icon.

     The tab displays the Edit view of the asset in Web View.

   - Make your changes to the asset.

5. Save the asset by doing one of the following:

   - In the asset's toolbar, click the **Save** icon.

   - In the menu bar, select **Content**, then select **Save**.

   WebCenter Sites saves the asset to the database, unless:

   - You have left out one or more required fields.

   - An entry or selection you have made in one or more fields is not permitted.

   If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors, then save the asset.

6. Inspect the asset by doing one of the following:

   • In the asset's toolbar, click the **Inspect** icon.

   • In the menu bar, select **Edit**, then select **Inspect**.

   The tab displays the Inspect view of the asset in Web View. When you inspect an asset, you cannot modify its content.

7. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process.

8. Preview the asset:

   • In the asset's toolbar, click the **Preview** icon.

     The tab displays the preview of the asset.

   • When you are done previewing the asset, click the **Go Back** icon.

     The tab re-displays the asset in Web View.

How do I change Web Page Layout

The web page layout (template) assigned to an asset determines the position of the slots and other editable areas displayed on the web page view of the asset. If you select a different layout for the asset, the slots and other editable areas are rendered in a different position, depending on how the web page layout (template) code is written. This section provides instruction on selecting a different web page layout (template) for an asset when working in Web View.

To change the web page layout of an asset:

1. From the Contributor interface, select the site containing the asset whose web page layout you want to change.

2. Find and open the asset.

3. If the asset opens in Form View, switch to Web View.

   • In the asset's toolbar, click the **Mode** switch.

   • If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

   The tab re-displays the asset's Inspect view in Web View.

4. In the asset's toolbar, click the **Edit** icon.

   The tab displays the Edit view of the asset in Web View.

5. To change the web page layout (template) of the asset, do one of the following:

   • In the asset's toolbar, click the **Change Page Layout** icon.

   • In the menu bar, select **Edit**, then select **Change Page Layout**.

   The Change Page Layout dialog opens.

   Select the web page layout (template) you want to assign to the asset, then click **Apply**.

   WebCenter Sites updates the asset's web page layout to the layout you selected. The web page layout (template) you select determines the position of the slots and other editable areas of the asset.

6. Save the asset by doing one of the following:

- In the asset's toolbar, click the **Save** icon.

- In the menu bar, select **Content**, then select **Save**.

  WebCenter Sites saves the asset to the database, unless:

  - You have left out one or more required fields.

  - An entry or selection you have made in one or more fields is not permitted.

  If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors, then save the asset.

7. Inspect the asset by doing one of the following:

   - In the asset's toolbar, click the **Inspect** icon.

   - In the menu bar, select **Edit**, then select **Inspect**.

   The tab displays the Inspect view of the asset in Web View. When you inspect an asset, you cannot modify its content.

8. Preview the asset:

   - In the asset's toolbar, click the **Preview** icon.

     The tab displays the preview of the asset.

   - When you are done previewing the asset, click the **Go Back** icon.

     The tab re-displays the asset in Web View.

How do I change Content Layout?

Each slot is assigned a content layout (template). The content layout of a slot determines the appearance of the asset contained within the slot. When you change the content layout of a slot, a Slot asset is created and stored in the WebCenter Sites database. When you approve the asset, you must also approve the Slot assets associated with that asset. This section provides instructions for changing the content layout (template) of a slot.

To change the content layout of a slot:

1. From the Contributor interface, select the site containing the asset whose slot's content layout you want to change.

2. Find and open the asset.

3. If the asset opens in Form View, switch to Web View:

   - In the asset's toolbar, click the **Mode** switch.

   - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

   The tab re-displays the asset's Inspect view in Web View.

4. In the asset's toolbar, click the **Edit** icon.

   The tab displays the Edit view of the asset in Web View.

5. Change the content layout (template) of a slot containing an asset:

   - Click the slot whose content layout (template) you want to change.

     The slot toolbar opens.

> If the slot is multi-valued, two or more slots become highlighted and the toolbar displays only the **Edit** and **Manage** options. Click the **Edit** option to edit the individual slots within the multi-valued slot. Click a slot to display its toolbar.

- In the slot toolbar, click the **Change content layout** option.

> ✎ **Note:**
>
> If you do not see the **Change content layout** option in the toolbar, stop here. The slot does not support this type of editing.

> The Change Content Layout dialog opens.

- Select a layout and then click **Apply**.

> The content contained within the slot is shown with the selected layout.

6. Save the asset by doing one of the following:

   - In the asset's toolbar, click the **Save** icon.
   - In the menu bar, select **Content**, then select **Save**.

   WebCenter Sites saves the asset to the database, unless:

   - You have left out one or more required fields.
   - An entry or selection you have made in one or more fields is not permitted.

   If either of the above is true, WebCenter Sites displays an error message indicating the offending fields. Correct the errors, then save the asset.

7. Inspect the asset by doing one of the following:

   - In the asset's toolbar, click the **Inspect** icon.
   - In the menu bar, select **Edit**, then select **Inspect**.

   The tab displays the Inspect view of the asset in Web View. When you inspect an asset, you cannot modify its content.

8. Preview the asset:

   - In the asset's toolbar, click the **Preview** icon.

     The tab displays the preview of the asset.

   - When you are done previewing the asset, click the **Go Back** icon.

     The tab re-displays the asset in Web View.

How do I edit associations?

When working with an asset in Web View, you can edit its associations by adding an asset to an empty slot, replacing an asset currently displayed in a slot with a different asset, repositioning the assets displayed in a multi-valued slot, and removing an asset from a slot.

16
How do I create Sites segments?

◀ WebCenter Sites Help

When you select **Sites** in the Subtype drop-down field, the Filtering Criteria form opens. The categories of visitor attributes and history definitions you can use to build your segment are listed in the drop-down list, and also in the mega-menu, which you open by clicking the mega menu icon.
Note that filtering on text strings is case-sensitive, unless explicitly set not to be so.

Do one of the following:

- To create a segment based on buyer contact information, see Create Segment Filtering Criteria with Visitor Attributes in *Using Oracle WebCenter Sites*.

- To create a segment based on the user profile, see Create Segment Filtering Criteria with Visitor Attributes in *Using Oracle WebCenter Sites*.

- To create a segment based on buyer history, see Create Segment Filtering Criteria with History Definitions in *Using Oracle WebCenter Sites*.

- To create a segment based on a history definition, see Create Segment Filtering Criteria with History Definitions in *Using Oracle WebCenter Sites*.

- To create a segment based on the shopping cart, see Define the Segment with Shopping Cart Criteria in *Using Oracle WebCenter Sites*.

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How do I create Bluekai segments?

◀ WebCenter Sites Help

You can create Bluekai segments with ready-to-use Bluekai campaigns for your Site in the Create New Segment form. The Bluekai campaigns will already have the filtering criteria defined in them. So to create your Bluekai segments, you have to select the appropriate Bluekai campaigns.

To create BlueKai segments:

1. Select **Bluekai** in the **Subtype** drop-down field. A **Campaign** drop-down field appears below it.

2. Expand the **Campaign** drop-down field to see all the Bluekai campaigns configured for your site.

> ✏ **Note:**
>
> To see the Bluekai campaigns in the **Campaign** drop-down field, Bluekai campaigns should be already created in the Bluekai partner site and the Bluekai properties have to be enabled from the Admin interface.

3. Select the Bluekai campaign from the list.

   Click the **Refresh** icon besides the **Campaign** drop-down field if you want to refresh the campaigns from Bluekai.

4. Click **Save**.

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How do I publish an approved asset?

◀ WebCenter Sites Help

If you are assigned the Publisher role, you can trigger an on demand publish on an asset after you approve it. This enables your changes to immediately hit the website, instead of having to wait for a scheduled publish or for your administrator to publish it.

To publish an approved asset from the Contributor interface:

1. From the Contributor interface, select the site containing the approved asset you want to publish.

2. Find and open the asset you want to publish.

3. In the asset's toolbar, click the **Publish** icon (this icon is the same as the **Approve** icon, however, if you are assigned the Publisher role, the tooltip below the icon displays **Publish** when you point to it). In the menu that opens below the **Publish** icon, select a publishing destination.

> ✎ **Note:**
>
> If the **Publish** icon is not available, then the Publisher role is not assigned to your user name. In this case, contact you administrator.

4. Select the assets you want to publish.

5. Click **Approve and Publish**.

> ✎ **Note:**
>
> If a scheduled publish is currently in progress, the publish session is queued and will start as soon as the scheduled publish is complete.

6. In the dialog box, click **Yes**.

   A message opens confirming that the Publish is in progress.

7. To check the status of the asset, click **Check Status** in the message bar.

   The Your Publish Sessions list opens.

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How do I find and organize assets?

◀ WebCenter Sites Help

WebCenter Sites provides an easy and effective way to find assets matching the criteria you specify. When you find them, you can both save the search criteria you used to find the assets and organize the assets into a personalized list for easy future access.

> ✏ **Note:**
>
> Search results include only assets with which you have permissions to work. (Permissions are set by your administrator.)

To learn about how to find and organize assets, review the following topics in *Using Oracle WebCenter Sites.*

• Search Guidelines

• Performing a Simple Search

• Performing an Advanced Search

• Working with the Search Results List

• Saving Your Search Criteria

• Finding Bookmarked Assets

• Bookmarking Assets

• Finding Assets from the My Work Tree

20

About the AssetMaker Utility

◀ WebCenter Sites Help

First define the basic asset type outside WebCenter Sites by coding an `XML` file called an *asset descriptor file*, using AssetMaker XML tags. The asset descriptor file defines properties for the new asset type. The term *property* means both a column in a database table and a field in a WebCenter Sites entry form.

Your next step is to upload the file to WebCenter Sites and create two items using AssetMaker: a database table for the new asset type, and the WebCenter Sites elements which generate the forms that you and others use when working with assets of the new type (creating, editing, copying, and so on).

For more information, see the following sections in *Oracle Fusion Middleware Developing with Oracle WebCenter Sites:*

- How AssetMaker Works
- Asset Descriptor Files
- Columns in the Asset Type's Database Table
- Elements and SQL Statements for the Asset Type

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About Designing Flex Asset Types

When creating flex asset types, you also create the individual data structure assets of those types. These assets are flex attributes, flex parent definitions, flex definitions, and flex parent assets. For creating flex asset types, the Flex Family Maker utility is available in the Admin interface.

◀ WebCenter Sites Help

Typically, you design the flex asset types and create the data structure assets on a development system. When your data model is ready, you migrate your work from the development system to the management and delivery systems.

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Registering a New Proxy Asset Type

◀ WebCenter Sites Help

To represent ProxyTest content in the WebCenter Sites repository, define a new proxy asset type.

To create a proxy asset type:

1. On the **Admin** node, expand **Proxy Asset Manager**, and double-click **Add New**.

   The Add New Proxy Asset Type page opens.

2. In the **Name** field, enter a name for the proxy asset type. Similarly, enter a description in the **Description** field, and enter a plural form of the name in the **Plural Form** field.

   > ✏️ **Note:**
   >
   > Creating or editing proxy assets through the Contributor interface is not available. Consequently, in this step, only a Search start menu should be enabled.

   In this example, and to use with the examples continuing through the rest of the document, enter `ProxyTest` in the **Name** field, `ProxyTest` in the **Description** field, and `ProxyTests` in the **Plural Form** field.

3. Click **Save**.

   > ✏️ **Note:**
   >
   > Proxy Asset Maker registers the new asset type and creates a single table with the same name. A proxy asset table has only a subset of standard asset metadata, and defines only one specific column: `externalid`. This column is meant to store the identifier of the external content in the external repository.

23

How to Prioritize Device Groups

◀ WebCenter Sites Help

You must prioritize multiple device groups to enable device detection which automatically associates a real device to the highest-priority device group at runtime.

To prioritize device groups:

1. Under the **Mobility** node, expand the **Device Groups** node.

2. Double-click **Reorder Device Groups**.

3. On the Reorder Device Groups page, drag and drop the device groups in the order of your preferred priority.

   When you have reordered the device groups, the Reorder Device Groups page displays them in the new sequence.

4. Click **Save Priority**.

   The **Device Groups have been re-prioritized successfully** message is displayed.

   Once you have prioritized your device groups and created the device assets, verify that device groups and assets are correctly associated by device detection. Open the device group and select the **Devices** tab to view the list of device assets associated with the device group.

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About Device Repository

◀ WebCenter Sites Help

The device repository is a file that WebCenter Sites uses to detect mobile devices. The device repository contains the properties of devices and uniquely identifies each device based on its user agent. WebCenter Sites detects devices by matching the user agent of the device to the user agent that is specified in the device repository.

> ✎ **Note:**
>
> A user agent is a software agent that acts on behalf of users. The format of a user-agent string is a list of product tokens (keywords) with optional comments. Most browsers specify the following format:
>
> ```
> Mozilla[version] (system and browser information]) [ platform] ([platform
> details]) [extensions]
> ```
>
> For example:
>
> ```
> Mozilla/so(iPad;u;CPUOS 3.2.1 like Mac OSx;en-us)ppleWebkit/
> 531.21.10(KHTML,like Gecko) Mobile/7B405
> ```

The two types of device repositories are:

*   `devices.xml`: This is the default repository included with WebCenter Sites. This repository is updated at the time of a product release and includes only popular devices. You can add more data to this repository as and when required.

*   WURFL: This is a third-party device information database from ScientiaMobile. WURFL is much more comprehensive than `devices.xml`, and it is updated regularly by ScientiaMobile. We recommend using WURFL to ensure you have the latest devices. A licensed copy can be obtained from ScientiaMobile. It is not included with WebCenter Sites.

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Name and Describe the Template Asset

◀ WebCenter Sites Help

The Name screen is used to identify the template as typed or typeless, assign the template to a category, specify arguments that may be passed to the template, and name keywords by which the template can be located in search routines.

When the Template asset is saved, field values that you specify in the Name screen (with the exception of legal arguments), are written to the Template table, as indicated in the procedures below.

> ✏ **Note:**
>
> At any time in the process of creating a template, you can save the template. WebCenter Sites will display the template's Inspect form. To return to the Template form, click the **Edit** link.

In the Name screen, fill in the fields as explained in the following steps:

1. (Required). In the **Name** field, type a descriptive template name that is unique for the template and for the type of asset(s) that the template renders. It is best to choose a name that reflects the function or purpose of the template.

    Valid Entries

    -   Up to 64 alphanumeric characters (the first character must be a letter)
    -   Underscores (_)
    -   Hyphens (-)
    -   Spaces (these will be converted to underscores when used in the SiteCatalog pagename for the template)

2. In the **Description** field, type a brief description of the template. You can use up to 128 characters.

3. In the **Source** field, select an option from the drop-down list if your template is derived from a source that you want to note.

4. In the **Category** field, select an option from the drop-down list to place the Template asset into a category.

5. (Required). In the **For Asset Type** field, identify your template as typed or typeless:

    -   If you are creating a typeless template (for example to dispatch to typed templates), select **Can apply to various asset types** and skip to step 7.
    -   If you are creating a typed template (which renders assets of a certain type), select an asset type. For example, if you are creating a template to render article assets, select **Article** from the drop-down list.

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6. (Required for typed templates). In the **Applies to Subtypes** field, select the appropriate subtypes from the menu.

> ✎ **Note:**
>
> A typed template should be used only for specific subtypes of the asset type that you selected in the preceding field (**For Asset Type**).

7. In the **Legal Arguments** field:

    a. Enter an argument that may be passed to the template and click **Add Argument**.

    b. In the fields that are displayed:

    • Specify whether the argument is optional or required.

    • Provide a description of the argument (to help you know the purpose of the argument you are creating).

    • Specify legal values (including descriptions) for the argument.

8. In the **Keywords** field, enter keywords that you and others can use as search criteria in the Advanced Search form when you search for this template in the future.

9. Click **Continue** to open the Element screen.

> ✎ **Note:**
>
> If you chose to save the Template asset, you will notice that WebCenter Sites adds two fields:
>
> • The Status field, which is pre-populated with the editorial status of the Template asset (created, edited, and so on). This field identifies the latest operation that was performed on the Template asset, regardless of whether the Template asset is associated with a workflow.
>
> • The ID field, which is pre-populated with a unique number that WebCenter Sites generates and assigns to the Template asset as its ID. (The ID field corresponds to the tid variable.)

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Configure the Template's Element

◀ WebCenter Sites Help

The Element screen is used to create the template's element, define the element file type (XML, JSP, or HTML), provide the element logic, and name the element. For example:

- The **Create Template Element** field offers a choice of XML, JSP, or HTML file types for the element logic, and is used to seed the Element Logic field with standard stub code (which you have to include in any element that you create).

  When you use the **Create Template Element** field to create, for example, a .jsp file, WebCenter Sites adds JSP `taglib` statements and the `RENDER.LOGDEP` tag to the **Element Logic** field by default so that WebCenter Sites can log the compositional dependency between this Template asset and pages that are rendered from this element. For other file types, WebCenter Sites adds code specific to the file type. You will add your own code to the **Element Logic** field.

- The **Element Storage Path/Filename** field names the file that holds the element logic and specifies the path to the file.

When the Template asset is saved, field values in the Element screen are written to a row (representing the element) in the `ElementCatalog` table.

> **✎ Note:**
>
> **About Selecting an Existing Element**
>
> In the steps that follow, we assume you are creating a new element for the Template asset. If, however, you are migrating assets from an earlier WebCenter Sites release and want to reuse an existing element, you have to identify the element correctly so that WebCenter Sites can find it and associate it with this Template asset.
>
> To select an existing element, do the following:
>
> 1. In the **ElementCatalog Description** field, type a description of the element.
>
> 2. In the **Element Storage Path/Filename** field, enter a value according to the naming convention in the "Naming Conventions Using TemplateName" table described in the "Naming a Template Asset" topic in *Developing with Oracle WebCenter Sites*.
>
> 3. In the **Element Parameters** field, specify the variables or arguments that can be passed to the element.
>
> 4. Save and re-open the Template asset.
>
>   WebCenter Sites checks for the existence of the named element:
>
>   If the element has been correctly named, WebCenter Sites recognizes the element and displays its code in the Element Logic field.
>
>   If the named element does not exist (or is incorrectly named), WebCenter Sites does nothing. When you inspect or edit the Template asset, WebCenter Sites displays a message stating that there is no root element in the form. As soon as you code the element and give it the correct name, WebCenter Sites detects it and associates it with the template.

In the Element screen:

1. In the **Usage** field, specify the intended usage of this template, using the information in the table as a guideline.

Usage Option	Description
Usage unspecified	Specifies a template that generates HTML. It is unknown whether the template is a Body template (see row 2 of this table) or a url template (see row 3 of this table).
Element is used within an HTML page	Specifies a template that is used inside the `<BODY>...</BODY>` tag of an HTML page. This option characterizes the template as a Body template.
Element is used as a layout	Specifies a layout template that generates a complete HTML page, and is used to render assets in Web Mode.
Element defines a whole HTML page and can be called externally	Specifies a template that generates a complete HTML page and can be used in a url. This option characterizes the template as a url template.

Usage Option	Description
Element is streamed as raw data	Specifies a template that generates raw binary data of an unknown type that is not HTML.

2. In the **Called Templates** field, select the template(s) that this template will call (if they exist).

3. In the **Create Template Element** field, do one of the following:

   - To create an .xml file, click **XML**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\Template\modelXML.xml` element and can be modified to use custom default logic.

   - To create a .jsp file, click **JSP**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\Template\modelJSP.xml` element and can be modified to use custom default logic.

   - To create an .html file, click **HTML**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\Template\modelHTML.xml` element and can be modified to use custom default logic.

   WebCenter Sites populates the following fields:

   - **Element Logic** field with a header and other auto-generated code.

     For example, if you clicked the **JSP** button, WebCenter Sites enters a tag library directive for each of the WebCenter Sites JSP tag libraries. WebCenter Sites also sets a `RENDER.LOGDEP` (`render:logdep`) tag to mark a compositional dependency between the Template asset and any page or pagelet rendered with the template.

   - **Element Storage Path/Filename** field. Do not change the value of this field.

     This field displays the element file name, preceded by the path to the element file.

     When you save the Template asset, the value in the **Element Storage Path/Filename** field is written to the url column of the `ElementCatalog` table, for the row that represents the element.

4. The **Rootelement** field is pre-populated with the value given in "Naming Conventions Using TemplateName" table. Do not change the value of this field. If the default value is changed, some tags that expect the default value, such as the `render:calltemplate` tag with the `style` attribute set to `element`, will fail.

5. (Optional). In the **ElementCatalog Description** field, type a description of the element. When you save the Template asset, information in this field is written to the description column for the element entry in the ElementCatalog table.

6. In the **Element Logic** field, code your element. Be sure to enter all of your code between the two `cs:ftcs` tags.

   If you are using JSP, remove the comments from the `taglib` directives that describe the tag libraries you are using.

> **✎ Note:**
>
> **Ensuring Template Sharing or a Replicable Site**
>
> To share your Template asset or make the current site replicable, ensure the template's element logic does not directly refer to assets, asset types, attribute names, or template names. Instead, use the render:lookup tag and prescribed keys as explained in "Template Sharing and Site Replication" in *Developing with Oracle WebCenter Sites*. In Configure the Map you map the same keys to the asset information that must be accessed for use in the element logic.
>
> **Calling a Template**
>
> Templates should *always* be called by the `render:calltemplate` tag, and never the `render:callelement` tag or `render:satellitepage` tag.

7. The **Element Parameters** field and **Additional Element Parameters** field are used to enter variables or arguments that can be passed to the element, if the site design requires them.

   - The **Element Parameters** field corresponds to the resdetails1 column in the ElementCatalog. When you save the template, WebCenter Sites writes the template ID (`tid)` to this field (i.e., to the `resdetails1` column).

   - The **Additional Element Parameters** field corresponds to the resdetails2 column in the `ElementCatalog`. WebCenter Sites leaves this field blank.

   If your site design requires you to use variables in addition to `tid` in your template element, enter the variables into one of the fields above. Enter them as `name=value` pairs with multiple arguments separated by the ampersand (&) character. For example:

   ```
   MyArgument=value1&YourArgument=value2
   ```

   Each field supports up to 255 characters.

   For more information about variables, see "Website Development with Tag Technologies" in *Developing with Oracle WebCenter Sites*

8. Click **Continue** to open the SiteEntry screen.

27
Configure SiteEntry

◀ WebCenter Sites Help

The SiteEntry screen is used to specify caching and pagelet parameters for the page to be rendered by this Template asset.

When the Template asset is saved, field values that you specify in the **SiteEntry** screen are written to the `SiteCatalog` table, as indicated in the procedures below.

In the SiteEntry screen, fill in the fields as explained in the steps below:

1. In the **Cache Criteria** field:

   a. WebCenter Sites names the following **reserved** variables as Cache Criteria:

   ```
   c,cid,context,p,rendermode,site,sitepfx,ft_ss
   ```

   > **Note:**
   >
   > Configure SiteEntry
   > The reserved Cache Criteria variables should not be removed.

   b. If you have to include your own variables as Cache Criteria (for example, **foo**), add them to the existing list. For example:

   ```
   c,cid,context,foo,p,rendermode,site,sitepfx,ft_ss
   ```

   > **Note:**
   >
   > The **Cache Criteria** field names the variables which, in conjunction with SiteCatalog Pagename, define a pagelet as being unique. The variables are used to identify cached pages, which means that the variables are used in the page's cache key.
   >
   > Only those variables that are specified as Cache Criteria are used by the caching system to create the cache key for cached pages. Therefore, if your site design requires you to use page-level variables in addition to the reserved variables, be sure to designate them as Cache Criteria variables, as shown in this step.

2. If you have to enable the Extra Parameters section in CKEditor, complete these steps:

   a. Move the "Extra Parameters" that were added to the Cache Criteria of the Template to the "Legal Arguments" section of the Template.

   b. When moving the parameters to the Legal Arguments section, it is no longer necessary to prefix the parameters with `fp:`, just use the parameter name.

For example, instead of using `fp:imageHeight`, just use `imageHeight`.

c. These parameters are then available in the included template, and can be retrieved in standard ways, such as using `<ics:getvar name="imageHeight"/>`.

The Extra Parameters section provides a way of passing custom parameters, such as image dimensions, to the template. These extra parameters will be available in the **Include asset link** and **Add asset link** dialog boxes. The parameter names (`imageHeight` and `imageWidth` in our example) will be displayed in CKEditor's Extra Parameters section, as options in the **Name** menu. The Value field enables the user to specify a value for the chosen parameter.

When the Template asset is saved, the Cache Criteria variables are written to the `pagecriteria` column in the `SiteCatalog` table.

3. The **Access Control Lists** field corresponds to the `acl` column in the `SiteCatalog` table. To allow only certain visitors to request this page, select the ACLs that the visitors must have to see the page.

4. The **Rootelement** field is pre-populated.

5. The **Cache Rules** field corresponds to the `cscacheinfo` and `sscacheinfo` columns in the `SiteCatalog` table. Do one of the following:

   - Select **Cached** if the pagelet to be rendered by this template's element must be cached. The pagelet is set to be cached forever. The cache will be flushed by CacheManager's active cache management logic. This option sets both WebCenter Sites and Satellite Server caching conditions.

   - Select **Uncached** to turn off caching for the pagelet to be rendered by this template's element. This option sets both WebCenter Sites and Satellite Server caching conditions.

   - Select **Advanced** to set caching rules individually for WebCenter Sites and Satellite Server. Selecting **Advanced** displays two additional fields: one for WebCenter Sites caching and one for Satellite Server caching.

   > **Note:**
   >
   > CacheManager is designed to manage the lifecycle for cached pages on both WebCenter Sites and Satellite Server. It is designed to operate with pages that are set to be cached forever. If the cache expires on WebCenter Sites before it expires on Satellite Server, CacheManager will fail to flush the cache properly and invalid pages may be served from cache. Only advanced users should configure these settings manually.

6. **SiteCatalog Pagename** field. Do not change the value of this field. This field is pre-populated with the name of the page entry.

7. In the **Pagelet parameters** section, you can enter pagelet parameters (name-value pairs), which will be passed into the template each time it is executed. The **Pagelet parameters** section supports a total of 510 characters.

> **Note:**
>
> The **Pagelet parameters** section is pre-populated with the following default pagelet parameters, including their values:
>
> ```
> site, sitepfx, rendermode
> ```
>
> The default parameter values will be overwritten if they are explicitly specified when the template is called.
>
> - If you are specifying a pagelet parameter in this step, make sure to list its name as a Cache Criteria variable.
>
> - If you named your own Cache Criteria variables, the variables are listed in the **Page parameters** section. If you do not specify values for these parameters, WebCenter Sites ignores the parameters.

When the Template asset is saved, the name-value pairs that are specified as **Pagelet parameters** are written to either the `resargs1` or `resargs2` column of the `SiteCatalog` table. The column to which they are written is not important and is managed automatically. (Each column supports up to 255 characters.)

8. Click **Continue** to open the Thumbnails screen.

9. Click **Continue** to open the Map screen.

> **Note:**
>
> You will return to the **Thumbnail** screen after you have completed creating the Template asset and saved the Template asset.

28

Create a Thumbnail (Optional)

◀ WebCenter Sites Help

A thumbnail graphically assists template users in determining how your Template asset lays out pages or renders content. The thumbnail that you create will be displayed in the Template's Inspect form.

When the Template asset is saved, the name of the thumbnail file is written to the `urlthumbnail` column of the `Template_Thumb` table.

To create a thumbnail, complete the following steps:

1. Preview your Template asset. For instructions, see *CSElement and SiteEntry Assets and Preview*.

2. Capture the preview as an image file and save it to a file system.

3. Open the Template form and click **Thumbnail** at the top of the screen.

   The Template Thumbnail form opens (see *Template Thumbnail Form*).

4. In the **Thumbnail Image** field, enter (or browse for) the path to the image file that you created in step *Link text cannot be resolved*.

5. To display the thumbnail in the Inspect form:

   a. Save the template (click the **Save** icon).

      WebCenter Sites uploads the image file to the WebCenter Sites database and displays template's Inspect form.

   b. In the Inspect form, scroll down to the Thumbnail Image section. If the displayed image is too large or too small, resize the image in its source file and repeat steps *4* and *5*.

6. To operate in the image in the Thumbnail screen:

   a. Scroll to the top of the Inspect form, and click the **Edit** link.

   b. At the top of the Template form, click **Thumbnail**.

7. To copy, send, and perform other operations on the thumbnail, right-click the thumbnail and select an option.

8. To delete the thumbnail, select **Delete thumbnail image?** and click **Save Changes**.

   WebCenter Sites displays the template Inspect form.

29
Configure the Map

◀ WebCenter Sites Help

The purpose of mapping is to enable site replication and the sharing of CSIElement assets. The concepts behind mapping are identical to those for Template assets. For more information see, *Template Sharing and Site Replication*.

> **✎ Note:**
>
> Skip this step if you are designing a non-replicable site.

Using the Map form, you will:

- Map each key in the `render:lookup` tags of the template's element logic to a value that will be used by the element logic.
- Map each key's value to the asset information that must be used in the element logic: asset, asset type, attribute name, or template name.

When the Template asset is saved, the map is written to the `Template_Map` table.

In the Map form, fill in the fields as explained in this step:

1. The **Key** field represents a value that the element logic will look up. Enter the key that is named in a `render:lookup` tag of the element logic.

2. The **Type** field identifies the type of asset information to be accessed. Select one of the following options:
    - **Template Name**: Maps a template name to the key value (which you will specify in the **Value** field, in the next step). The information that will be accessed is a template name that matches the value that you will specify in the next step. For an example, see *Template Asset: Sample Map*.
    - **Asset Type**: Maps an asset type to the key value. The information that will be accessed is an asset type, equal to the value that you will specify in the next step.
    - **Asset (Type:Name)**: Maps an attribute type:name to the key value. The information that will be accessed is an asset whose type and name match the value that you will specify in the next step.
    - **Asset (Type:ID)**: Maps an attribute type:ID to the key value. The information that will be accessed is an asset whose type and name match the value that you will specify in the next step.

3. In the **Value** field, enter a value for the key. This value will be looked up by the element logic when the CSIElement asset is invoked.

4. In the **siteid** field, select the name of the site to which the mapping applies.

5. To add a key, click **Add Another** and repeat the steps in this section.

30
Name and Describe the CSElement Asset

◀ WebCenter Sites Help

The Name screen is used to define metadata about the CSElement. From this metadata, a developer can identify what the CSElement does and the arguments it uses to perform its function.

> **✎ Note:**
>
> At any time in the process of creating a CSElement, you can save the CSElement. WebCenter Sites will display the CSElement's Inspect form. To return to the CSElement form, click the **Edit** link.

To name and describe the CSElement, in the Name screen, fill in the fields.

1. (Required). In the **Name** field, type a unique, descriptive name for the CSElement asset. It's best to use a name that describes what the CSElement does.

   Valid Entries

   - Up to 64 alphanumeric characters (the first character must be a letter)
   - Underscores (_)
   - Hyphens (-)
   - Spaces (these will be converted to underscores when used in the SiteCatalog pagename for the template)

   > **✎ Note:**
   >
   > Make sure you have chosen a name for your CSElement asset using the guidelines in the section *Before You Begin Creating SiteEntry Assets*.

2. In the **Description** field, type a brief description of the CSElement asset. You can enter up to 128 characters.

3. In the **Legal Arguments** field:

   a. Enter an argument that may be passed to the CSElement and click **Add Argument.**

   b. In the fields that are displayed:

      - Specify whether the argument is optional or required.
      - Provide a description of the argument (to help you know the purpose of the argument you are creating).
      - Specify legal values (including descriptions) for the argument.

(You can specify as many arguments and legal values as you require by clicking the **Add Arguments** and **Add Legal Value** buttons.)

4. Click **Continue** to open the Element screen.

31

Configure the Element

◀ WebCenter Sites Help

The Element form (CS Element) is used to create the CSElement's element, define the element file type (XML, JSP, or HTML), provide the element logic, and name the element. For example:

- The **Create Element** field offers a choice of XML, JSP, or HTML file types for the element logic, and is used to seed the Element Logic field with standard stub code (which you have to include in any element that you create).

- When you use the **Create Element** field to create, for example, a .jsp file, WebCenter Sites adds JSP `taglib` statements and the `render.logdep` tag to the **Element Logic** field by default so that the compositional dependency between this CSElement asset and pages that are rendered from this element is logged. For other file types, WebCenter Sites adds code specific to the file type. You will add your own code to the **Element Logic** field.

  For information about dependencies, see *About Dependencies*. For help with coding the element logic, see *Coding Elements for Templates and CSElements*.

- The **Element Storage Path/Filename** field names the file that holds the element logic and specifies the path to the file.

When the CSElement is saved, field values in the Element screen are written to a row (representing the element) in the `ElementCatalog` table.

> **✎ Note:**
>
> **About Selecting an Existing Element**
>
> In the steps that follow, we assume you are creating a new element for the CSElement asset. If, however, you are migrating assets from an earlier WebCenter Sites release and want to reuse an existing element, you have to identify the element correctly so that WebCenter Sites can find it and associate it with the CSElement asset.
>
> To select an existing element
>
> - (Optional). In the **ElementCatalog Description** field, type a description of the element.
>
> - In the **Element Storage Path/Filename** field, enter a value according to the convention in *Naming the CSElement*.
>
> - If your site design requires it, enter the appropriate arguments in the element parameter fields. For instructions, see step *Link text cannot be resolved*.
>
> - Save and re-open the CSElement asset.
>
> WebCenter Sites checks for the presence of an element with the correct name:
>
> If the element has been correctly named, WebCenter Sites recognizes the element and displays its code in the Element Logic field.
>
> If the named element does not exist (or is incorrectly named), WebCenter Sites does nothing. When you inspect or edit the CSElement asset, WebCenter Sites displays a message stating that there is no root element in the form. As soon as you code the element and give it the correct name, WebCenter Sites detects it and associates it with the CSElement asset.

To configure a new element, enter the fields in the CSElement Element Form.

1. In the **Create Element** field, do one of the following:

   - To create an .xml file, click **XML**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\CSElement\modelXML.xml` element and can be modified to use custom default logic.

   - To create a .jsp file, click **JSP**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\CSElement\modelJSP.xml` element and can be modified to use custom default logic.

   - To create an .html file, click **HTML**. The code that is pasted in comes from the `OpenMarket\Xcelerate\AssetType\CSElement\modelHTML.xml` element and can be modified to use custom default logic.

   WebCenter Sites populates the following fields:

   - **Element Storage Path/Filename** field. Do not change the value of this field.

     This field displays the element file name preceded by the path to the element file. By default, the file takes the name of the CSElement asset (entered in step) followed by the file extension:

```
CSElementName.xml_or_jsp_or_html
```

When you save the CSElement asset, the value in this field is written to the url column of the ElementCatalog table, for the row that represents the element.

- **Element Logic** field with a header and other information.

  For example, if you clicked the **JSP** button, WebCenter Sites sets a tag library directive for some common WebCenter Sites JSP tag libraries (`asset, siteplan, render`). WebCenter Sites also sets the beginning and ending cs:ftcs tags, and a `RENDER.LOGDEP (render:logdep)` tag to mark a compositional dependency between the CSElement asset and any page or pagelet rendered by the element.

2. The **Rootelement** field is pre-populated with the name of the element file *(CSElementName.xml_or_jsp_or_html)*. Do not change the value of this field.

   The root element is listed by this name in the `ElementCatalog` table. When you create code that calls this element `(RENDER.CALLELEMENT)`, this is the name you should use. It uses the name of the CSElement asset by default.

3. (Optional). In the **ElementCatalogDescription** field, type a description of the element.

   When you save the CSElement asset, information in this field is written to the `description` column for the element entry in the ElementCatalog table.

4. (Required). In the **Element Logic** field, code your element. Be sure to enter all of your code before the ending `cs:ftcs` tag.

   If you are using JSP, remove the comments from the `taglib` directives that describe the tag families you are using.

   For help with this step, see *Coding Elements for Templates and CSElements*.

> **✎ Note:**
>
> **Ensuring Template Sharing or a Replicable Site**: To share your CSElement or make the current site replicable, ensure the CSElement's element logic does not directly refer to assets, asset types, attribute names, or template names. Instead, use the `render:lookup` tag and prescribed keys as explained in *Template Sharing and Site Replication*. In *Configure the Map* you will map the keys to the asset information that must be accessed for use in the element logic.
>
> **Calling a Template**: Templates should *always* be called by the `render:calltemplate` tag, and never the `render:callelement` tag or `render:satellitepage` tag.

5. The **Element Parameters** field and **Additional Element Parameters** fields are used to enter variables or arguments that can be passed to the element, if the site design requires them.

   - **Element parameters** field. WebCenter Sites populates this field with the CSElement ID (`eid`), generated by WebCenter Sites as a unique identifier of the CSElement asset. **Do not change or delete this value**.

This field corresponds to the resdetails1 column of the ElementCatalog table. When you save the CSElement, WebCenter Sites writes the CSElement ID to the `resdetails1` column, in the row that represents the CSElement.

- **Additional Element Parameters** field. WebCenter Sites leaves this field blank.

  This field corresponds to the `resdetails2` column of the `ElementCatalog`.

If your site design requires you to use variables in addition to eid, enter the variables into one of the fields above. Enter them as *name=value* pairs with multiple arguments separated by the ampersand (&) character. For example:

```
MyArgument=value1&YourArgument=value2
```

Each field supports up to 255 characters.

For more information about WebCenter Sites variables, including scope and precedence, see *Website Development with Tag Technologies*.

6. Click **Continue** to open the Map screen.

32
Configure the Map for Shared CSElement

◀ WebCenter Sites Help

The purpose of mapping is to enable site replication and sharing of CSElement assets. The concepts behind mapping are identical to those for Template assets. They are explained in *Template Sharing and Site Replication*.

> **Note:**
>
> Skip this section if you are designing a non-replicable site or a CSElement asset that is not shared.

Using the Map form, you will:

- Map each key in the `render:lookup` tag of the element logic to the value that must be used in the element logic.
- Map each key's value to the asset information that must be used in the element logic: asset, asset type, attribute name, or template name.

When the CSElement asset is saved, the map is written to the `CSElement_Map` table.

In the Map form, enter fields in the *CSElement Map Form*.

1. The **Key** field represents the value that the element logic will look up. In this field, enter the key that is named in a render:lookup tag of the element logic.

2. The **Type** field identifies the type of asset information to be accessed. Select one of the following options:

    - **Template Name**: Maps a template name to the key value (which you will specify in the Value field, in the next step). The information that will be accessed is a template name that matches the value you will specify in the next step.

    - **Asset Type**: Maps an asset type to the key value. The information that will be accessed is an asset type, equal to the value that you will specify in the next step.

    - **Asset (Type:Name)**: Maps an attribute type:name to the key value. The information that will be accessed is an asset whose type and name match the value that you will specify in the next step.

    - **Asset (Type:ID)**: Maps an attribute type:ID to the key value. The information that will be accessed is an asset whose type and name match the value that you will specify in the next step.

3. In the **Value** field, enter a value for the key. This value will be looked up by the element logic when the CSElement asset is invoked.

4. In the **siteid** field, select the name of the site to which the mapping applies.

5. To add a key, click **Add Another** and repeat the steps in this section.

33

Creating a SiteEntry Asset

◀ WebCenter Sites Help

You can create a `SiteEntry` asset through the WebCenter Sites interface.

To create a `SiteEntry` asset, do these tasks:

- Open the SiteEntry Form
- Create the SiteEntry Asset
- Save and Inspect the SiteEntry Asset

> ✎ **Note:**
>
> Before starting the procedures in this section, read *Before You Begin Creating SiteEntry Assets* for information about creating SiteEntry assets.

34
About the Admin Window

Along with Developers, you can use the Admin interface to perform tasks and configure elements that help in defining and creating a functional site structure. Use the Admin interface to manage WebCenter Sites content management sites, asset types, users, and features such as publishing, workflow, and security.

◀ WebCenter Sites Help

Administrators use WebCenter Sites Admin to:

- Create and configure users accounts and profiles, including creating and assigning ACLs and roles to users.
- Configure and implement security for WebCenter Sites, including REST security, encryption key security, and external security.
- Configure and schedule publishing sessions.
- Create and manage workflow processes.
- Enable revision tracking on asset types.
- Enable asset types on content management sites and create start menu items which enable users to work with those asset types in the Contributor interface.
- Configure vanity URLs on a per-asset type basis by creating WebRoots and defining URL patterns.
- Manage the WebCenter Sites caching system (inCache framework).
- Use diagnostic utilities to troubleshoot the WebCenter Sites system.
- Integrate and manage WebCenter Content with WebCenter Sites.
- Configure the Lucene search engine for the Contributor interface.

Developers use WebCenter Sites Admin to:

- Build the data model by creating and defining asset types. For example:
  - Creating flex families, which includes defining flex attributes, flex parents, flex parent definitions, flex definitions, flex assets, and flex filters.
  - Creating basic asset types and database tables for those basic assets.
  - Creating proxy assets
- Create design assets for content management sites, such as Template, CSElement, SiteEntry, Wrapper, Filter, and so on.
- Design attribute editors and configure bundled attribute editors.
- Configure sites for multilingual support.
- Configure the Mobility feature. For example, create device repositories, device groups and suffixes, device assets, site navigations, and mobile templates.

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About the WEM Admin Window

Use the WEM Admin interface that runs on WebCenter Sites to manage the sites, applications, users, and roles for WebCenter Sites systems. Developers use it to create applications and integrate them with WebCenter Sites, but its main function is to define roles for users to create applications.

◀ WebCenter Sites Help

WEM Admin supports only general and site administrator functions. To access this interface, the WEM Framework must be running on WebCenter Sites, you must have access to AdminSite, and you must be assigned either the `GeneralAdmin` or `SiteAdmin` role.

When WEM Admin opens, the first screen you see is the Sites list. General administrators see all the sites created on the WebCenter Sites system while site administrators see only the sites in which they are assigned the SiteAdmin role. The menu bar at the top of the WEM Admin interface displays the following options:

- **Sites**: Click this option to view a list of all the sites on the WebCenter Sites system in which you are assigned either the GeneralAdmin or SiteAdmin role. If you are a general administrator, there is an **Add Site** option displayed above the list of sites. Click the **Add Site** option to create a new content management site. For information about working with the Sites list in WEM Admin, see *Managing Sites in the WEM Admin Interface* in *Administering Oracle WebCenter Sites*.

- **Apps**: Click this option to view a list of all the applications available to be assigned to the sites on your WebCenter Sites system. For more information about working with the Apps list, see *Managing Applications* in *Administering Oracle WebCenter Sites*.

- **Users**: Click this option to view a list of all the users created for your WebCenter Sites system. If you are a general administrator, there is an **Add User** option displayed above the list of Users. Click this option to create a new WebCenter Sites user. For more information about working with the Users list, see *Managing Users in the WEM Admin Interface* in *Administering Oracle WebCenter Sites*.

- **Roles**: Click this option to view a list of all the roles that have been created for your WebCenter Sites system. If you are a general administrator, there is an **Add User Role** option displayed above the list of roles. Click this option to create a new user role for your WebCenter Sites system. For more information about the Roles list, see *Managing Roles From the WEM Admin Interface* in *Administering Oracle WebCenter Sites*.

- **Down/Up** arrow: Located at the top-right of the menu bar. Click the arrow to either open or close the applications bar. From the applications bar you can switch to another site or application, edit your WebCenter Sites profile, and log out of WebCenter Sites. For information about modifying your profile from the applications bar, see *Modify Your Own Profile* in *Administering Oracle WebCenter Sites*.

36

Using the System Default Locale for WebCenter Sites Users

◀ WebCenter Sites Help

When the language packs are installed, the installer writes the language and country code for the locale of the language pack to the `LocaleMap` database table. For example, Portuguese Brazilian is `pt_BR`. When there are multiple locales listed in the `LocaleMap` table the administrator should specify which should be the default locale. This can be done in the following ways:

- **Set a new global default language.** You can use the WebCenter Sites Local Manager to replace the current default language for your WebCenter Sites system with a different language pack. This language will become the new default language globally on your WebCenter Sites system. You also have an option to set a different default language for individual users, but not from the Locale Manager.

- **Set a new default language on a per-user basis.** This option allows you to select a default language for individual users that is different from the global default language that you select in the Locale Manager form. See *Working with User Profiles and User Attributes* in in *Administering Oracle WebCenter Sites* for information about how to set a user's locale preference.

WebCenter Sites determines which language to use for an individual user through its universal session variable `locale`. This variable contains the language and country code associated with the user who is logged in.

When a user logs in to WebCenter Sites, WebCenter Sites obtains the value for the `locale` variable as follows:

- If the user profile has a value for the `locale` user attribute, WebCenter Sites obtains and uses it.

- If the user profile does not specify a preference, WebCenter Sites attempts to match the locale setting of that user's browser to a locale from the `LocaleMap` table.

- If the user profile does not set a preference and WebCenter Sites cannot match that user's browser locale, WebCenter Sites uses the default locale that is set for the system.

- If the user profile has a value for the `locale` user attribute but does not have the files and stylesheets necessary to support that language in the browser, WebCenter Sites uses the default locale that is set for the system. Ensure the files and stylesheets for the locale are located in the application server directory under the `CSS` folder (`/Xcelerate/data/CSS`).

- If the default locale does not have the files and stylesheets necessary to support the default locale set for the system, then the admin pages will be displayed without stylesheets and formatting. Ensure the files and stylesheets for the default

locale are located in the application server directory under the `CSS` folder (`/Xcelerate/data/CSS`).

> **Note:**
>
> When you select a site and set a new system default language from that site, the language is automatically set as the global default language for all sites on your WebCenter Sites system.

To set the system default locale:

1. In the **General Admin** tree, expand the **Admin** node, and then double-click **Locale**.

   The Locale Manager form displays.

2. Click the **Edit** icon next to the locale.

   A radio button opens on the form in the Default column.

3. Select the **Default** radio button next to the locale.

4. Click **Save**.

   The next time users log in to WebCenter Sites, the system displays in the new default language.

> **Note:**
>
> An individual user's language preference (which is set from the User Profiles option) overrides the language preference set for the WebCenter Sites system (which is set from the Locale Manager). See *Working with User Profiles and User Attributes* in in *Administering Oracle WebCenter Sites* for information about how to set a user's locale preference.

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Creating a Site From the Admin Interface

◀ WebCenter Sites Help

To create a site you specify a site name, description, and a method for previewing site content, as follows:

1. In the **General Admin** tree, expand the **Admin** node, expand the **Sites** node, and then double-click **Add New**.

    The Add New Site form opens.

2. In the **Name** field, enter the name for the new site. Note the following conventions when naming the site:

    •   The name must be between 1 and 255 characters.

    •   The following characters are not allowed: single-quote ('), double quote ("), semicolon (;), colon (:), question mark (?), ampersand (&), less-than sign (<), and greater-than sign (>). Additionally, the name cannot end with a backslash.

    •   The name cannot contain spaces.

3. In the **Description** field, enter the name of the site as you want it to appear in the WebCenter Sites interfaces (up to 64 characters). This site name is used in site lists throughout the user interface.

4. In the **Preview method** field, select the method how you will preview the site content.

5. Click **Add Site**.

    The Site form opens.

    This form is used to execute several operations. For example, inspect, edit, or delete the site, manage users, or configure Site Launcher to replicate the site.

    When the new site is added to the **Sites** node, WebCenter Sites creates, below the site name, a set of sub-nodes that prompt you for site components:

    •   Click **Manage users for this site** for this site to manage site users.

    •   Click **Enable Asset Types...** to select asset types for the website; click **Disable Asset Types...** to remove asset types. Asset types are created by developers.

    •   Click **List all Start Menu items for this site** to show the Start Menu items which have been created for the site.

    •   Click **List all Workflow Processes for this site** to manage the workflows for the site.

    •   Click **Configure Site Launcher for this site** to configure and enable Site Launcher.

    Each sub-node is equipped with a linking mechanism that allows you to associate the sub-node, and therefore the site, with data in the configuration pool. Because of this linking mechanism, the sub-nodes cannot be deleted or supplemented with

custom sub-nodes. Selecting a sub-node allows you to create All data required by the sub-nodes must be entered in to the configuration pool, described next.

Note that the procedure above only adds new sites.

- To make a site usable, you must associate users and asset types (created by developers) with the site. If you plan to use workflow processes, you should create those processes as well.

- To copy or migrate the site to another WebCenter Sites system, use the RealTime publishing method. See the chapters on real-time publishing.

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Creating a RealTime Destination Definition on the Source System

◀ WebCenter Sites Help

In this step, you will define the publishing destination to the source system:

> **Note:**
>
> While you can define multiple destinations, bear in mind that only sequential publishing is supported.

1. On the source system, log in to the administrator's interface.

2. In the **General Admin** tree, expand the **Admin** tree, expand the **Publishing** node, and expand the **Destinations** node.

3. Under the **Destinations** node, double-click **Add New**.

   The Add New Destination form opens.

4. Fill in the Add New Destination form. For guidelines, use the information below.

   - **Name**: Enter a unique name for the destination.

     > **Note:**
     >
     > The following characters are not allowed in the **Name** field: single quote ('), double quote ("), semicolon (;), colon (:), less-than sign (<), greater-than sign (>), percent (%), and question mark (?). Additionally, the name cannot end with a backslash (\).

   - **Delivery Type**: Select **RealTime: Copy assets to remote dynamic server**, then choose an option:

     - **Complete publish** to copy assets to the destination address without interruption to the publishing process.

     - **Delayed publish** to pause the publishing process before assets are committed to the destination database. To resume the session, a user must initiate the fourth stage of publishing (deserializing [inflating] data and saving it to the destination database). More information on delayed publishing can be found in *Resuming a Delayed Publishing Session* in in *Administering Oracle WebCenter Sites*.

   - **Destination Address**: Enter the URL in the format shown. For `[targetserver:port]`, delete the brackets, enter the host name or IP address

of the destination system, and specify the port to be used by the destination. (A slash is required after the URL because this URL is appended dynamically.)

- **Remote User**: Enter the name of the RealTime user that you created in *Setting Up the Destination System* in *Administering Oracle WebCenter Sites*. This user is called by the publishing system to unpack the RealTime queue on the destination system.

- **Remote Password**: Enter the password of the RealTime user.

- **Send Email on Failure**: If publishing fails and email notices to that effect are required, select the check box and fill in the field that opens:

  - **EmailIDs**: Enter the recipient's email address. (This field is available only when **Send Email on Failure** is selected.)

- **Verbose Output**: Select this option to activate detailed error logging during the publishing process. When this option is selected, messages in addition to error messages are written to the `PubMessage` table. Because additional information lengthens the publishing process, select this parameter only for troubleshooting.

- **More Arguments**: This parameter is reserved; no additional arguments can be specified at this time.

- **Sites**: Select the sites whose assets can be approved for and published to this destination.

- **Roles (Approve for Publish)**: Select the roles to which you are assigning asset approval privileges. All users assigned these roles are able to approve assets.

- **Roles (Publish)**: Select the roles to which you are assigning publish privileges. All users assigned these roles are able to publish and view the Publish Console.

5. Click **Add New Destination**.

   WebCenter Sites writes your information to the `Pubdestination` table and displays the destination definition in the Inspect form:

   > **Note:**
   >
   > A red button next to the destination name means that the target server cannot be located. Common causes are the target URL is incorrect or the target server is not running.

6. To create more destination definitions, repeat steps 3 through 5 for each new definition.

7. When you are ready to initialize the destination system, proceed to "Initializing the Destination Database" in *Administering Oracle WebCenter Sites*. Begin at step 3 of that procedure.

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Start Menus

◀ WebCenter Sites Help

A start menu is a site component. Items on the menu provide a way of coupling a user with the asset types he is to work with on the site. The coupling is accomplished by means of roles.

WebCenter Sites defines two start menus: New, which allows the user to create assets on the site, and Search, which allows the user to look for and edit assets on the site.

A start menu item specifies:

- The site(s) to which the start menu item applies

- The asset type that users on the sites can work with

- The roles that are allowed to create or search for assets of those types

- The workflow processes (if any) in which the roles can participate

In other words, a start menu item determines which roles can create and search for assets of a specific type on a site, and which workflow processes the roles can participate in.

WebCenter Sites creates start menu items automatically and gives you the option to configure your own.

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Working with Start Menu Items

◄ WebCenter Sites Help

Each option in a start menu is a start menu item. A start menu item names the type of asset a user can create, copy, or search for. For example, the **New** start menu shown in *New Menu in the Admin Interface* belongs to the Admin Interface and shows 16 start menus items to the user authorized to work with the items. The user can create assets of the types listed in the menu.

In the Admin Interface, start menu items are shown in a list when users click **New** or **Search** in the button bar.

You configure the start menu items to determine the following about the assets that are created with them:

- Which roles on which sites have access to the start menu item. Specifying roles controls which content providers can create or search for assets of this type on the specified sites.

- Field/value pairs. You can supply values for certain fields so that those fields are automatically filled in whenever a content provider creates an asset with the shortcut.

  For example, for basic assets, it can be useful to have the start menu item set a pre-determined value for the **Dimension**, **Description**, **End Date**, **Start Date**, **Subtype**, **Template** or **User** fields (or some combination). If your basic assets have associations that can be different based on the subtype of the asset, be sure to create start menu items that set a subtype for new assets so that the only the appropriate associations appear in the **New** form.

  For flex assets, it is useful to have start menu items that set the flex definition for new flex assets so the content providers have fewer steps.

- Which workflow process to assign by default to new assets created with the start menu item and the users who participate in that workflow process.

Start menu items also determine whether certain operations can be performed on an asset type that is listed in a tree (in the Admin interface). If an asset type is shown on a tree, but there is no start menu item created for it, the only options listed in the right-click menu for the asset type are **Refresh**, **Edit**, and **Inspect**. To have the **New** option included in the right-click menu, a **New** start menu item must be created for the asset type.

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Creating and Managing Workflow Processes

◀ WebCenter Sites Help

The following topics in *Administering Oracle WebCenter Sites* describe workflow, a feature used to manage the work on an asset when multiple people participate in its creation. For example, if assets of a certain type must be reviewed by an editor or a legal representative before it can be approved for publishing, the workflow feature can route those assets to the appropriate people at the appropriate time.

- About the Workflow Feature
- Planning Your Workflow Processes
- Configuring Your Workflow Processes
- Setting Up Email Objects
- Setting Up the Actions and Conditions
- Configuring Approve for Publish Step Actions
- Setting Up the Timed Action Event
- Setting Up the States
- Setting Up the Workflow Processes
- Creating Workflow Processes
- Testing Your Workflow Process
- Moving Your Work
- Clearing Workflow Assignments
- Creating and Viewing Workflow Reports
- Creating Workflow Groups

For more information about creating and managing workflow processes, see the "Creating and Managing Workflow Processes" chapter in *Administering Oracle WebCenter Sites.*

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Overview of the CAS Cache Summary Form

◀ WebCenter Sites Help

The CAS Cache Summary form lists the following basic data for each cache (values are estimates):

- Total Count (total number of cached elements)
- Memory Store Count (number of cached elements in memory)
- Disk Store Count (number of cached elements on disk)
- Cache Hits (number of cached elements retrieved from both memory and disk)
- In Memory Hits (number of cached elements retrieved from memory)
- On Disk Hits (number of cached elements retrieved from disk)
- Cache Misses (number of times elements were not found in the cache)
- Eviction Count (number of elements evicted from the cache)
- Average Get Time (average number of milliseconds for retrieving an element)
- Max Elements In Memory (maximum number of elements allowed in memory)
- Max Elements On Disk (maximum number of elements allowed on disk)
- Overflow to Disk (whether elements are written to disk when memory is full)

This form also provides the following options. They should be used with caution, especially on a delivery system, as they can impact the performance of your site.

- Writing a cache's entire memory store to disk. This option can be particularly useful if WebCenter Sites is not set up to automatically write a cache's memory store to disk before shutting down.
- Flushing a cache's entire memory and disk stores.

> ✎ **Note:**
>
> If legacy page caching is enabled, cached page data is stored in the `SystemPageCache` table and information about the stored data is not displayed in the Summary window.

To view and work with summary cache information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **CAS Cache** node, and then double-click **Summary**.

   The Summary page is shown in *CAS Cache Summary* window.

2. Select the check box for the **Ticket Cache** or the **Session Cache** (or both) and click **Write To Disk** to write the selected cache's entire memory store to disk.

3. Select the check box for the **Ticket Cache** or the **Session Cache** (or both) and click **Flush Cache** to flush the memory and disk stores for the selected caches.

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Working with the Page Cache

◀ WebCenter Sites Help

This form lists statistics for each cached page, such as visit count, time of creation/last access/expiration, and dependencies. The table legend identifies which types of information are tracked: invalidated pages, updates to dependencies, and changes to the dependency generation count. The form also provides the following options:

- Searching the cache for specific pages – Searches are CPU intensive and should be used with caution on a delivery system.

- Flushing pages from the cache.

- Viewing html information for pages.

- Looking up page dependencies.

The view and work with items in the Page Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **Page Cache**.

    The Pages form appears.

2. At the top of the form is the Search area. Select to search by **Key**, **Expired Time**, or by **Dependency**. If you enter an expired time to search by, use the forms *mm/dd/yyyy* or *mm/dd/yyyy hh:mm:ss* to enter a date and time. Click **Search**.

3. In the displayed items in the cache, click the header title to sort the items by that criteria.

    All items are shown when initially loading the **Pages** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. Underneath each item in the **Key** column, a **view page details** link opens. Click **view page details** to open a new window that shows the page's HTML information.

5. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

6. To view the pages for a specific item within the cache, select the check box on the right side of each item. Select the check box in the header to mark all. Click **Page Lookup** to show the pages for the dependency or dependencies.

    Note that each item in cache can have multiple check boxes on the right side, reflecting multiple dependencies.

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> **Note:**
>
> After WebCenter Sites is restarted, this form does not show page cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

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Working with Cache Management — Sites Cache

◀ WebCenter Sites Help

The following topics provide information about cache management for Sites Cache:

- Overview of the Sites Cache Summary Form
- Working with Page Cache
- Working with the Dependency Cache
- Working with the Asset Cache
- Working with the URL Cache
- Viewing Cluster Information

Overview of the Sites Cache Summary Form

The Sites Cache Summary form lists the following basic data for each cache (values are estimates):

- Total Count (total number of cached elements)
- Memory Store Count (number of cached elements in memory)
- Disk Store Count (number of cached elements on disk)
- Cache Hits (number of cached elements retrieved from both memory and disk)
- In Memory Hits (number of cached elements retrieved from memory)
- On Disk Hits (number of cached elements retrieved from disk)
- Cache Misses (number of times elements were not found in the cache)
- Eviction Count (number of elements evicted from the cache)
- Average Get Time (average number of milliseconds for retrieving an element)
- Max Elements In Memory (maximum number of elements allowed in memory)
- Max Elements On Disk (maximum number of elements allowed on disk)
- Overflow to Disk (whether elements are written to disk when memory is full)

This form also provides the following options. They should be used with caution, especially on a delivery system, as they can impact the performance of your site.

- Writing a cache's entire memory store to disk. This option can be particularly useful if WebCenter Sites is not set up to automatically write a cache's memory store to disk before shutting down.
- Flushing a cache's entire memory and disk stores

> **✎ Note:**
>
> If legacy page caching is enabled, cached page data is stored in the SystemPageCache table and information about the stored data is not displayed in the Summary window. This window also shows the **Clear Page Cache** button, which allows you to flush the stored data in System Page Cache and Co-Res SS Cache.
>
> As System Page Cache is legacy, it must be enabled for use. This is done by disabling Ehcache by including the following as a JVM parameter of appserver:
>
> ```
> -Dcs.useEhcache=false
> ```

To view and work with summary cache information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Sites Cache** node, and then double-click **Summary**.

    The Summary form appears.

2. Select the check box for the **PageCache**, **Cache Dependencies**, **Asset Cache**, or **URL Cache** and click **Write To Disk** to write the selected cache's entire memory store to disk.

3. Select the check box for the **PageCache**, **Cache Dependencies**, **Asset Cache**, or **URL Cache** and click **Flush Cache** to flush the memory and disk stores for the selected caches.

If you have enabled System Page Caching, a button labeled **Clear Page Cache** will appear underneath the **Flush Cache** button. Click **Clear Page Cache** to flush the SystemPageCache table and Co-Res SS Cache.

Working with Page Cache

This form lists statistics for each cached page, such as visit count, time of creation/last access/expiration, and dependencies. The table legend identifies which types of information are tracked: invalidated pages, updates to dependencies, and changes to the dependency generation count. The form also provides the following options:

*   Searching the cache for specific pages – Searches are CPU intensive and should be used with caution on a delivery system.

*   Flushing pages from the cache.

*   Viewing html information for pages.

*   Looking up page dependencies.

The view and work with items in the Page Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Sites Cache** node, and then double-click **Page Cache**.

    The Pages form is shown.

2. At the top of the form is the Search area. Select to search by **Key**, **Expired Time**, or by **Dependency**. If you enter an expired time to search by, use the forms *mm/dd/yyyy* or *mm/dd/yyyy hh:mm:ss* to enter a date and time. Click **Search**.

3. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **Pages** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. Underneath each item in the **Key** column, a **view page details** link opens. Click **view page details** to open a new window that shows the page's HTML information.

5. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

6. To view the pages for a specific item within the cache, select the check box on the right side of each item. Select the check box in the header to mark all displayed dependencies. Click **Page Lookup** to show the pages for the dependency or dependencies.

   Note that each item in cache can have multiple check boxes on the right side, reflecting multiple dependencies.

> **✎ Note:**
>
> After WebCenter Sites is restarted, this form does not show page cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

Working with the Dependency Cache

This form lists the contents of the dependency cache and the generation count for each dependency. In addition, it provides the following options:

- Searching the cache for specific dependencies – Searches are CPU intensive and should be used with caution on a delivery system.
- Flushing dependencies from the cache
- Looking up page dependencies

The view and work with items in the Dependency Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Sites Cache** node, and then double-click **Dependency**.

   The Dependencies form appears.

2. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **Dependencies** form. The **Search** form limits what opens, making it easier to find items in the cache.

3. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

4. To view the pages for a specific item within the cache, select the check box on the right side of each item. Select the check box in the header to mark all displayed dependencies. Click **Page Lookup** to show the pages for the dependency or dependencies.

> **✎ Note:**
>
> After WebCenter Sites is restarted, this form does not show dependency cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

Working with the Asset Cache

This form lists statistics for each cached asset, such as visit count, time of creation/last access, and dependencies. The table legend identifies which types of information are tracked: invalidated assets, updates to dependencies, and changes to the dependency generation count. The form also provides the following options:

- Searching the cache for specific assets. Searches are CPU intensive and should be used with caution on a delivery system.
- Flushing assets from the cache
- Looking up asset dependencies

The view and work with items in the Asset Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Sites Cache** node, and then double-click **Asset Cache**.

   The Assets form is shown.

2. At the top of the form is the Search area. Select to search by **Key** or by **Dependency**, and to show **All** or **Any** assets with the entered search value. Click **Search**.

3. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All assets are shown when initially loading the **Assets** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

5. To view the assets for a specific dependency within the cache, select the check box on the right side of each asset. Select the check box in the header to mark all displayed assets. Click **Asset Lookup** to show the dependencies.

> **✎ Note:**
>
> After WebCenter Sites is restarted, this form does not show asset cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

Working with the URL Cache

All the Vanity URLs are cached after the resolution is done in a web page in inCache. The cache can be looked up and managed in the **Cache Management** node under **System Tools**.

The view and work with items in the URL Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Sites Cache** node, and then double-click **URL Cache**.

   The URLs form appears.

2. The Search area is at the top of the form. Select to search by **Key** or by **Dependency** with the entered search value. Click **Search**.

3. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **URL** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. To flush selected URLs from the cache, select the check box on the left side of each URL. Select the check box in the header to select all displayed URLs. Click **Flush Cache** to flush the memory and stores of the URLs.

5. To view the URL for a specific dependency within the cache, select the check box on the right side of each URL. Select the check box in the header to mark all displayed URLs. Click **Asset Lookup** to show the dependencies.

Viewing Cluster Information

If Sigar is configured, The **Cluster Info** form lists the name, URL, port, and GUID of each additional WebCenter Sites cluster member.

To view and work with cluster information:

In the **General Admin** tree, expand the **Admin** tab, expand the **System Tools** node, expand the**Cache Management** node, expand the **Sites Cache** node, and then double-click **Cluster Info**. to show the Cluster Info form.

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Working with Cache Management — Co-Res Cache

◀ WebCenter Sites Help

The following topics provide information about cache management for the Co-Res Cache:

- Overview of the Co-Res Cache Summary Form
- Working with the Page Cache
- Working with the Dependency Cache
- Working with the URL Cache
- Viewing Cluster Information

Overview of the Co-Res Cache Summary Form

The cache summary form for the Co-Res Satellite Server lists the following basic data for each cache (values are estimates):

- Total Count (total number of cached elements)
- Memory Store Count (number of cached elements in memory)
- Disk Store Count (number of cached elements on disk)
- Cache Hits (number of cached elements retrieved from both memory and disk)
- In Memory Hits (number of cached elements retrieved from memory)
- On Disk Hits (number of cached elements retrieved from disk)
- Cache Misses (number of times elements were not found in the cache)
- Eviction Count (number of elements evicted from the cache)
- Average Get Time (average number of milliseconds for retrieving an element)
- Max Elements In Memory (maximum number of elements allowed in memory)
- Max Elements On Disk (maximum number of elements allowed on disk)
- Overflow to Disk (whether elements are written to disk when memory is full)

This form also provides the following options. They should be used with caution, especially on a delivery system, as they can impact the performance of your site.

- Writing a cache's entire memory store to disk. This option can be particularly useful if WebCenter Sites is not set up to automatically write a cache's memory store to disk before shutting down.
- Flushing a cache's entire memory and disk stores.

> **✎ Note:**
>
> If legacy page caching is enabled, cached page data is stored in the SystemPageCache table and information about the stored data is not displayed in the Summary window.

To view and work with summary cache information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **Summary**.

2. Select the check box for the **PageCache**, **Cache Dependencies**, or **URL Cache** and click **Write To Disk** to write the selected cache's entire memory store to disk.

3. Select the check box for the **PageCache**, **Cache Dependencies**, or **URL Cache** and click **Flush Cache** to flush the memory and disk stores for the selected caches.

Working with the Page Cache

This form lists statistics for each cached page, such as visit count, time of creation/last access/expiration, and dependencies. The table legend identifies which types of information are tracked: invalidated pages, updates to dependencies, and changes to the dependency generation count. The form also provides the following options:

- Searching the cache for specific pages – Searches are CPU intensive and should be used with caution on a delivery system.

- Flushing pages from the cache.

- Viewing html information for pages.

- Looking up page dependencies.

The view and work with items in the Page Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **Page Cache**.

2. At the top of the form is the Search area. Select to search by **Key**, **Expired Time**, or by **Dependency**. If you enter an expired time to search by, use the forms *mm/dd/yyyy* or *mm/dd/yyyy hh:mm:ss* to enter a date and time. Click **Search**.

3. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **Pages** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. Underneath each item in the **Key** column, a **view page details** link opens. Click **view page details** to open a new window that shows the page's HTML information.

5. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

6. To view the pages for a specific item within the cache, select the check box on the right side of each item. Select the check box in the header to mark all. Click **Page Lookup** to show the pages for the dependency or dependencies.

   Note that each item in cache can have multiple check boxes on the right side, reflecting multiple dependencies.

> **Note:**
>
> After WebCenter Sites is restarted, this form does not show page cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

Working with the Dependency Cache

This form lists the contents of the dependency cache and the generation count for each dependency. In addition, it provides the following options:

- Searching the cache for specific dependencies. Searches are CPU intensive and should be used with caution on a delivery system.
- Flushing dependencies from the cache.
- Looking up page dependencies.

The view and work with items in the Dependency Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **Dependency**.

2. In the displayed items in the cache, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **Dependencies** form. The **Search** form limits what opens, making it easier to find items in the cache.

3. To flush selected assets from the cache, select the check box on the left side of each asset. Select the check box in the header to select all displayed assets. Click **Flush Cache** to flush the memory and stores of the assets.

4. To view the pages for a specific item within the cache, select the check box on the right side of each item. Select the check box in the header to mark all displayed dependencies. Click **Page Lookup** to show the pages for the dependency or dependencies.

> **Note:**
>
> After WebCenter Sites is restarted, this form does not show dependency cache information until the cache engine is initialized. The cache engine is initialized when the first page or asset is requested.

Working with the URL Cache

All the Vanity URLs are cached after the resolution is done in a web page in inCache. The cache can be looked up and managed in the **Cache Management** node under **System Tools**.

The view and work with items in the URL Cache:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **URL Cache**.

2. At the top of the form is the Search area. Select to search by **Key** or by **Dependency** with the entered search value. Click **Search**.

3. In the displayed items, click the header title to sort the items by that criteria.

   All items are shown when initially loading the **URLs** form. The **Search** form limits what opens, making it easier to find items in the cache.

4. To flush selected URLs from the cache, select the check box on the left side of each URL. Select the check box in the header to mark all displayed URLs. Click **Flush Cache** to flush the memory and stores of the URLs.

5. To view the URLs for a specific dependency within the cache, select the check box on the right side of each URL. Select the check box in the header to mark all displayed URLs. Click **Asset Lookup** to show the dependencies.

Viewing Cluster Information

If Sigar is configured, the **Cluster Info** form lists the name, URL, port, and GUID of each additional WebCenter Sites cluster member.

To view and work with cluster information:

- In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **Cache Management** node, expand the **Co-Res SS Cache** node, and then double-click **Cluster Info**.

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Using the Configure Log ODL Tool

◀ WebCenter Sites Help

By default WebCenter Sites is set up to use the Oracle Diagnostic Logging (ODL) system. The Configure Log ODL tool enables you to view current logger levels, change logger levels, and add new loggers directly from the Admin interface. In addition, since changes to logger levels and added loggers remain in effect only until WebCenter Sites is restarted, you can retain your changes by manually adding new loggers to the `logging-config.xml` file.

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Setting Up External Security

Security standards help organizations to prevent compromise of important information. WebCenter Sites provides you with robust security features to protect your data and attributes through security protocols, encryption of assets, and REST security.

◀ WebCenter Sites Help

The administrator and the site developers must discuss and determine how security is configured on both the management and the delivery systems before they start coding templates and designing asset types.

For more information about setting up external security, see the "Setting Up External Security" chapter in *Oracle Fusion Middleware Administering Oracle WebCenter Sites.*

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Authorizing Users to Access Application Resources

◀ WebCenter Sites Help

Before authorizing users to access application resources, see "REST Authorization" in *Administering Oracle WebCenter Sites* for background information relating to the steps provided in the following topics:

- Viewing REST Security Configurations
- Creating a Group
- Adding Users to a Group
- Configuring Security for REST Resources

> 📝 **Note:**
>
> To configure security for REST resources, you to must assign privileges to groups. To view the list of groups, continue with the section "Viewing REST Security Configurations". To create groups, see the section "Creating a Group".

Viewing REST Security Configurations

A security configuration identifies which groups have which permissions to which REST resources. WebCenter Sites defines security configurations for two default groups. They are `RestAdmin` and `SiteAdmin_AdminSite`.

To view REST security configurations:

1. Log in to the WebCenter Sites Admin interface as a general administrator.

2. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, expand the **REST Security** node, and then double-click **Configure Security**.

   The Security Configurations window opens in the main window.

3. Depending on your requirements, continue as follows:

   - To create a group, see the section "Creating a Group".

   - To add users to a group, see the section "Adding Users to a Group".

> **Note:**
>
> To complete this step, ensure that the required groups exist. You must assign privileges to the groups.

- To configure security privileges for REST resources, see the section "Configuring Security for REST Resources".

Creating a Group

To create a group:

1. Log in to the Admin interface as a general administrator.

2. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, expand the **REST Security** node, expand the **Groups** node, and then double-click **Add New**.

3. In the Add New Group form, enter a name and brief description about the group you want to create.

4. Click **Save**.

   The group you created is now listed under the **Groups** node.

5. Now that you have created a group, you can:

   - Add users to the group. For instructions, see the section "Adding Users to a Group".

   - Configure REST security for the group. For instructions, see the section "Configuring Security for REST Resources".

Adding Users to a Group

Add users to a group to determine the permissions that they will have to operate on REST resources associated with applications.

1. Log in to the Admin interface as a general administrator.

2. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, expand the **REST Security** node, expand the **Assign Users to Groups** node, and then double-click **Add New**.

3. In the Assign Groups to User form, select users and assign them to any combination of the listed groups.

   > **Note:**
   >
   > If the user you want to assign to the group is not listed, that user is a member of a group. To assign the user to another group, see step 5.

4. Click **Save**.

   The user names you selected are listed under the **Assign Users to Groups** node. To view the groups that include a particular user, double-click the user name.

5. (Optional). If the name of the user you want to assign to a given group is not displayed in the **User Name** field, do the following:

    a. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, expand the **REST Security** node, expand **Assign Users to Groups**, and then double-click the name of the user you want to assign to another group.

    b. In the Inspect form, click **Edit** to open the Edit User Groups form.

    c. In the **Groups** field, select the groups to which you want to assign the user, and then click **Save**.

6. Now that you have added users to a group, you can do the following:

- Create a group. For more information, see the section "Creating a Group".

- Configure security for a group. For more information, see the section "Configuring Security for REST Resources".

Configuring Security for REST Resources

When configuring security, you specify which object types and objects must be accessible to groups, and which actions the groups can perform on the objects.

To configure security for REST resources:

1. Log in to the Admin interface as a general administrator.

2. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, expand the **REST Security** node, expand the **Configure Security** node, and then double-click **Add New**.

3. In the Add New Security Configuration form, set security for object types and objects.

    These two tables show a summary of possible security configurations.

Action	Description
Create	Group members can create specified resources.
Delete	Group members can delete specified resources.
List	Group member can retrieve specified resources.
Read/Head	Group members can read specified resources. Read returns the requested resources. Head returns metadata describing the requested resources.
Update	Group members can modify specified resources. **Note:** Create and Update are each paired with the Read/Head privilege. Assigning one of these privileges to a group automatically assigns the Read/Head privilege to the group.

Object Type	Name	Subtype	Site	Possible Actions
ACLs	Any	N/A	N/A	List
Application (see note 1)	Any	N/A	N/A	Create, Update, Delete
Application	*AppName*	N/A	N/A	Update, Delete

Object Type	Name	Subtype	Site	Possible Actions
Asset	Any	N/A	Any	List, Read/Head, Create, Update, Delete
Asset	Any	N/A	*SiteName*	List, Read/Head, Create, Update, Delete
Asset	*AssetType*	N/A	*SiteName*	List, Read/Head (see note 2), Create, Update, Delete
Asset	*AssetType* and *AssetName*	N/A	*SiteName*	Read/Head, Update, Delete
AssetType	Any	N/A	N/A	List, Read/Head, Create, Delete
AssetType	*AssetType*	N/A	N/A	Read/Head, Delete
AssetType	*AssetType*	Any	N/A	List
AssetType	*AssetType*	*Subtype*	N/A	Read/Head
Group	Any	N/A	N/A	List
Group	*GroupName*	N/A	N/A	Read/Head
Index	Any	N/A	N/A	List, Read/Head, Create, Update, Delete
Index	*IndexName*	N/A	N/A	Read/Head, Update, Delete
Role	Any	N/A	N/A	List, Read/Head, Create, Update, Delete
Role	*Role*	N/A	N/A	Read/Head, Update, Delete
Site	Any	N/A	N/A	List, Read/Head (see note 3), Create, Update, Delete
Site	*SiteName*	N/A	N/A	Read/Head, Update, Delete
User	Any	N/A	N/A	List, Read/Head, Create, Update, Delete
User	*UserName*	N/A	N/A	Read/Head, Update, Delete
UserDef	Any	N/A	N/A	List
UserLocales	Any	N/A	N/A	List

For more information, see the REST security topics in *Administering Oracle WebCenter Sites.*

> **Note:**
>
> 1. For an example of setting security for applications, see step 3.
> 2. READ allows reading associations on the named site.
> 3. READ allows reading users and asset types on the named site.

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Viewing Database Information

◀ WebCenter Sites Help

You can download or view the following types of database information:

- **Basic Information** – The database engine and version, default transaction isolation level, JDBC driver, URL, and version, and JNDI data source.

- **System Tables** – Tables that store core WebCenter Sites data. The ElementCatalog table, for example, lists all of the XML or JSP elements used in your system.

- **Tree Tables** – Tables that store parent-child relationships between objects. The AssetRelationTree, for example, stores information about the associations between assets.

- **Sites Object Tables** – Tables that store uniquely identified objects, such as asset types, asset attributes, and asset definitions.

- **Other Sites Tables** – Tables that store flat data that cannot be organized into parent-child relationships and the foreign tables that WebCenter Sites does not manage.

> **Note:**
>
> You have permission to access a database table if at least one Access Control List (ACL) assigned to the table is assigned to your user. For more information about database permissions, see *Access Control Lists (ACLs)* in *Administering Oracle WebCenter Sites*.

To download or view database information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **System Information**, and then double-click **DB Info**.

   The Database Information form is displayed with basic information about your database and the tables that you can select to download or view.

2. In the System Tables, Tree Tables, Sites Object Tables, and Other Sites Tables sections, select the tables to view and click **Add**.

3. To download the selected database information as a spreadsheet file, click **Download** and then open or save `SysInfo.zip`. The spreadsheet file is inside `SysInfo.zip`.

4. To view the selected database information in the administrator's interface, click **Show Results**.

   a. For each selected table that you have permission to access, the following information opens:

      - Table Name

- Primary key

- Number of rows

- CSz (number of resultsets to cache in memory)

- Timeout (number of minutes to keep a resultset cached in memory)

- Abs (how to calculate the expiration time for resultsets)

- Time to run SQL

- Special table key

b. To view a table's column and indices, click its "plus" icon. If an index is listed more than one time, it extends across multiple rows, as illustrated in *Tree Tables Information*.

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Viewing WebCenter Sites Information

◀ WebCenter Sites Help

You can download or view the following types of WebCenter Sites information:

- **Memory Information** – The amount of free memory in the application server Java Virtual Machine, the total amount of memory free and in use, and the maximum amount of memory that the Java Virtual Machine will attempt to use.

- **Sites Properties** – The `ini`, `xml`, and `properties` files in the WebCenter Sites installation directory.

- **Web Apps Properties** – The `xml` and `properties` files in the `WEB-INF` and `WEB-INF/classes` directories on the application server.

- **Other Sites Info** – The `jar` files in the `WEB-INF/lib` directory on the application server, the session variables for the user currently logged in to WebCenter Sites, and the Java run-time properties.

To download or view WebCenter Sites information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, then expand the **System Information** node, and then double-click **Sites Info**.

   The WebCenter Sites Information form is shown.

   This form shows memory information and additional information that you can select to download or view.

2. In the Sites Properties and Web Apps Properties sections, select the files that you are interested in and click **Add**.

3. In the Other Sites Info section, do the following:

   - To obtain information about the `jar` files in the `WEB-INF/lib` directory on the application server, select the **Jar Versions** check box.

   - To obtain the session variables for the user currently logged in to WebCenter Sites, select the **Sites Session Variables** check box.

   - To obtain Java run-time properties, select the **System Variables** check box.

4. To download the selected WebCenter Sites information as a text file, click **Download** and then open or save `SysInfo.zip`. The text file is inside `SysInfo.zip`.

5. To view the selected WebCenter Sites information in the administrator's interface, click **Show Results**.

   a. The selected files and information are displayed directly in the administrator's interface.

   b. To view the details of a file or type of information, click its "plus" icon.

For `ini` and `properties` files, and WebCenter Sites session variables and system variables, the properties and values are shown in *Properties and Values for cas.properties* screen.

For `xml` files, the code is shown in *XML File Code Display*.

For Jar Versions, the `jar` names, versions, and implementation vendors are shown in *Jar Versions and Vendors*.

`NA` : `NA` indicates that a `jar` file does not provide its version and vendor.

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Viewing Thread Information

◀ WebCenter Sites Help

You can download or view thread dumps to analyze the runtime state of the application server. This can be especially useful when trying to detect problems that could result in resource starvation or thread hangs.

To download or view thread information:

1. In the **General Admin** tree, expand the **Admin** node, expand the **System Tools** node, expand the **System Information** node, and then double-click **Thread Info**.

   The Thread Information form is shown.

2. The **Regular Expression** check box is selected by default. This option enables you to use Java regular expressions to search for thread names.

   Examples:

   - **Thread.*** to find `Thread-0`, `Thread-1`, and `Thread-3`

   - **.*thread.*** to find `pool-6-thread-1`, `pool-8-thread-1`, and `pool-14-thread-2`

   If you deselect the check box, you must search for exact thread names.

3. In the **Thread Name** field, enter the thread name or text string to search for.

4. To limit your search to one or more thread states, select the state(s) in the **States** field. If you do not select a state, all states are searched.

5. To download the selected thread information as a text file for use with a thread dump analyzer, click **Download** and then open or save `SysInfo.zip`. The text file is inside `SysInfo.zip`.

   > ✎ **Note:**
   >
   > Downloading thread information is possible only in the following cases:
   >
   > - WebCenter Sites JDK includes a compatible `jstack` utility.
   >
   > - The first JDK listed in your operating system's library path includes a `jstack` utility that is compatible with WebCenter Sites JDK.
   >
   > If a compatible `jstack` is not found, the following message is shown: "Thread dump feature is not supported for this platform."

6. To view the selected thread information in the administrator's interface, click **Show Results**.

   For each thread matching the search, the following information opens:

   - Name

   - ID

- State
- Total time the CPU executed the thread
- Total time the thread was in user mode
- Number of times it was blocked and waited
- How long it was blocked and waited
- Object for which it is waiting
- Stack trace

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Working with ACLs

This topic shows you how to create ACLs, edit, and delete custom ACLs; apply ACLs to the database tables and WebCenter Sites pages; and customize access restricted messages.

◀ WebCenter Sites Help

> **Note:**
>
> When using an LDAP integration option, be aware of system response to user and site management operations. For information about system response, see "Users, Sites, and Roles in LDAP-Integrated Sites Systems" in *Administering Oracle WebCenter Sites*.

- Creating an ACL
- Editing a Custom ACL
- Deleting a Custom ACL
- Assigning ACLs to Custom Tables
- Assigning ACLs to WebCenter Sites Pages

Creating an ACL

> **Note:**
>
> When creating ACLs, consider the roles you are using to ensure that the ACLs are commensurate with the roles. For example, if you are creating a role that allows a user to create template assets, the user who is assigned that role must also be assigned the `ElementEditor` ACL, because creating templates writes data to the ElementCatalog table.

To create a new ACL:

1. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, and then double-click **ACLs**.

   The ACLs form opens.

2. Select **Add ACL** and click **OK**. The value in the Select an ACL field does not matter at this point.

   The Add ACL form opens.

3. In the **ACL Name** field, enter a unique name.

4. Select the access privileges you want to assign to this ACL. For information about each privilege, see "Permissions" in *Administering Oracle WebCenter Sites*.

5. Click **Add**.

   WebCenter Sites creates the ACL and writes it to the SystemACL table. The new ACL opens in the drop-down list in the form described in step 1 of this procedure.

6. If you are using LDAP, create a group (on your LDAP server) that exactly matches the ACL you just created. After you create the group, assign it to the appropriate users.

Editing a Custom ACL

> ⚠ **Caution:**
>
> Never modify any of the system ACLs. For a list of these ACLs, see "System ACLs and Their Permissions in *Administering Oracle WebCenter Sites*.

To edit a custom ACL:

1. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, and then double-click **ACLs**.

   The ACLs form opens.

2. In the **Select an ACL** field, select the ACL to edit.

3. Select **Modify ACL** and click **OK**.

   If the ACL you selected is a system ACL, an alert opens. Do not modify system ACLs.

4. In the **Modify ACL** form, make the changes to the Description and Access Privileges. For information about the options, see "Permissions" in *Administering Oracle WebCenter Sites*.

5. Click **Modify**.

   WebCenter Sites writes your changes to the SystemACL table.

Deleting a Custom ACL

> ⚠ **Caution:**
>
> Never modify any of the system ACLs. For a list of these ACLs, see "System ACLs and Their Permissions in *Administering Oracle WebCenter Sites*.

To delete a custom ACL:

1. If you are using LDAP, delete (from your LDAP server) the group corresponding to the ACL you are deleting.

2. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, and then double-click **ACLs**.

   The ACLs form opens.

3. In the **Select an ACL** field, select the ACL to delete.

4. Select the ACL from the drop-down list and click **OK**.

   A warning message opens.

5. Click **OK**.

   The ACL has been deleted.

Assigning ACLs to Custom Tables

If you or the site designers create tables, you might have to restrict access to those tables by assigning ACLs to them. Typically, you assign ACLs to new tables when you create those tables. (For more information, see "Controlling User Access" in *Developing with Oracle WebCenter Sites*.

> **Note:**
>
> Do not assign additional ACLs (beyond the ones assigned by default) to system or core product tables.

To assign ACLs to an existing table:

1. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, and then double-click **Sites Database**.

   The Sites Databaseform opens.

2. Enter the name of the table to which you want to assign ACLs. If you do not know the name of the table you want to work with, do the following:

   • Leave the field blank. WebCenter Sites will return a list of all tables in the database.

   • Enter a partial name, ending with the wildcard character (**%**). WebCenter Sites will return a list of tables named similarly to your criteria.

3. Select **Modify Table** and click **OK**.

4. In the list of tables, select the table.

   The Modify Catalog form opens.

5. In the **ACL** field, select the ACL(s) you want to assign to the selected table. To select multiple ACLs, **Ctrl-click** each ACL. You can also select a range of ACLs by selecting the first and last ACL in the range with **Shift-click**.

> **Note:**
>
> Do not change the value of the File Storage Directory field. For information about this field, look up the `defdir` property in *Developing with Oracle WebCenter Sites*.

6. Click **Modify**.

Assigning ACLs to WebCenter Sites Pages

ACLs are nearly always set using the Oracle WebCenter Sites Explorer tool. However, administrators can assign ACLs to the page entry created for SiteEntry or template assets through a field in the Create or Edit form.

To assign ACLs to a SiteEntry asset:

1. Find and open the SiteEntry asset to modify.

2. In the **Access Control Lists** field, select the ACLs to assign to this asset.

3. Save the asset.

The Access Control Lists field is available when creating a new SiteEntry asset as well. Assign ACLs when creating SiteEntry assets in the same way.

To assign ACLs to a template asset:

1. Find and open the template asset to modify.

2. Select the **Element** section.

3. In the **Access Control Lists** field, select the ACLs to assign to this asset.

4. Save the asset.

The Access Control Lists field is available when creating a new template asset as well. Assign ACLs when creating template assets in the same way.

To assign ACLs to pages that are not associated with a SiteEntry asset or a template asset, use the Oracle WebCenter Sites Explorer tool.

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Security Model

The WEM security model is based on objects, groups, and actions. Objects and groups are predefined in WebCenter Sites (objects in WebCenter Sites map to REST resources in the WEM Framework). Actions are privileges (READ, CREATE) that you create in WebCenter Sites. You must configure security per object type in the WebCenter Sites Admin interface:

- An *object* is any entity such as a site, a user, or an asset. Protected objects are of the following types:
    - Asset Type
    - Site
    - User Locale
    - Application
    - Asset
    - Role
    - ACL
    - Index
    - User
    - Group
- *Security groups* are used to manage multiple user's permissions to operate on objects.
- Objects of a given type are accessible to a user only if the user belongs to at least one group with privileges to perform specified actions on objects of the given type.
- An *action* is a security privilege: `LIST`, `HEAD`, `READ`, `UPDATE`, `CREATE`, `DELETE`. Groups are assigned privileges to operate on the objects allowed to the groups. Some objects, such as ACLs, are list-only (they are created directly in WebCenter Sites, but not over REST).

A security configuration is an array that specifies:

- The protected object type and objects
- Groups that are able to access the objects
- Actions that groups (and their members) can perform on the objects

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REST Authorization

◀ WebCenter Sites Help

REST authorization grants privileges to perform REST operations on application resources which map to objects in WebCenter Sites. REST authorization uses the "deny everything by default" model. If a privilege is not explicitly granted to a particular group, that privilege is denied. General administrators are responsible for authorizing users after the application is deployed and registered with the WEM Framework.

The following topics provide information about REST authorization:

* Security Model
* Privilege Resolution Algorithm

Privilege Resolution Algorithm

When configuring a security privilege, you can specify that the privilege applies to all objects of a certain type or a single object of a certain type. For example, granting the privilege to `UPDATE (POST)` any site allows users in the group to modify the details of all sites in the WEM Framework. Granting the privilege to `UPDATE (POST)` the avisports site allows users in the group to modify avisports site details in WEM.

The `Asset` object type requires you to specify the site to which the security setting applies, because assets are always accessed from a particular site. You can refine the `AssetType` object type by specifying a subtype. For example, if you set the `DELETE` privilege on asset type `Content_C`, you perform a `DELETE` request on the REST resource `/types/Content_C` (that is, to delete the `Content_C` asset type from the system).

Because you can grant privileges to groups only, the total privileges for a user are not obvious until they are computed across all of the groups to which the user belongs. The WEM Framework provides a privilege resolution algorithm. Its basic steps are listed below:

1. REST finds the groups in which the user has membership.

2. REST determines which groups can perform which REST operations on which REST resources. If site or subtype is specified, each is taken into account.

3. REST compares the results of steps 1 and 2. If at least one group from step 1 is in the list of groups from step 2, then access is granted. Otherwise, access is denied.

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Creating a User in the Admin Interface

◀ WebCenter Sites Help

This topic provides information and instructions about creating a user in the Admin interface.

> **✎ Note:**
>
> If you are using LDAP, refer to the LDAP product documentation, if you are using WEM Admin, refer to "Using the Web Experience Management Framework" in *Administering Oracle WebCenter Sites*.

Before creating a user, determine the user's:

*   User name.
*   Password.
*   ACLs, which regulate the user's access to WebCenter Sites database tables.
    *   To determine the user's required ACLs, see "Required ACLs for Custom Users" in *Administering Oracle WebCenter Sites*.
    *   To determine the user's additional system ACLs, see "System ACLs and Their Permissions" in *Administering Oracle WebCenter Sites*.
    *   To determine which ACLs are assigned to the database tables the user must access, follow the steps in "Assigning ACLs to Custom Tables" in *Administering Oracle WebCenter Sites*.

To create a user in the Admin Interface:

1. In the **General Admin** tree, expand the **Admin** node, expand the **User Access Management** node, and then double-click **User**.

2. In the User form, select **Add User** and click **OK**.

    You can add a user name before clicking **OK**; it will appear auto-filled in the **Login Name** field on the next form.

    The Add User form opens.

3. Fill in the fields in the **Add User** form:

    a. In the **Login Name** field, enter a unique name. Do not include spaces or special characters, such as punctuation. The underscore character (_) is allowed.

    b. In the **Access Privileges** list, select ACLs for the user. To select multiple ACLs, **Ctrl-Click** each ACL; you can also select a range of ACLs by selecting the first and last ACL in the range with **Shift-Click**.

    c. Enter the same password into the **Password** and **Re-Enter Password** fields.

    d. Click **Add**.

    The user is created.

You can create a general administrator. For more information about making the user an administrator or a content contributor, see "Creating Common User Types" in *Administering Oracle WebCenter Sites*.

To follow-up with post-creation procedures:

1. If the user implements any of the following options, create a profile for the user:

   - Oracle WebCenter Sites products such as Oracle WebCenter Sites: Engage.

   - Language packs and different languages.

   - Workflow processes that send email messages.

   For instructions on creating user profiles, see "Creating and Editing a User profile" in *Administering Oracle WebCenter Sites*.

2. If the user requires attributes in addition to or in place of locale and email (specified in the user profile), create the attributes. For instructions, see "Modifying, Adding, and Deleting User Attributes" in *Administering Oracle WebCenter Sites*.

3. After the user has been completely defined, you must associate the user with a site by means of roles.

   a. If you have not done so, create roles for the user, following instructions in "Creating a Role From the Admin Interface" in *Administering Oracle WebCenter Sites*.

   b. To associate the user to the site, create the site and add the user to the site. For instructions, see Creating a Site From the Admin Interface and "Granting Users Access to a Site (Assigning Roles to Users)" in *Administering Oracle WebCenter Sites*.

56
Required ACLs for Custom Users

◀ WebCenter Sites Help

The following table lists the ACLs that are required by users based on common user descriptions.

Table 56-1   System ACLs Required by Users

User	Required ACLs
All users	Browser, Element Reader, PageReader, UserReader, xceleditor
Workflow Administrator Site Administrator	xceladmin
General Administrator	xceladmin, TableEditor, UserEditor, VisitorAdmin (for Engage)
Site Designer	xceladmin, ElementEditor, PageEditor, TableEditor, Visitor (for Engage), Visitor Admin (for Engage)
Engage Users	Visitor
Users of Web Mode in the Oracle WebCenter Sites: Contributor interface	Browser, ElementReader, PageReader, RemoteClient, UserReader, Visitor (for Engage), xceleditor

57
Working with WebRoots

▶ WebCenter Sites Help

The WebRoot is used to control how the vanity URL is interpreted. WebRoots are like assets. After it is configured, a WebRoot must be published to the destinations for it to work in delivery system.

WebRoots come in two forms: absolute and relative. An absolute WebRoot must contain the entire URL prefix (including host and port information), it may also optionally contain a PATH prefix, it is unique to every server. A relative WebRoot contains only information related to the PATH and does not contain any information on the host or port. Both URLs are handled identically by WebCenter Sites; however, with relative WebRoot only a single WebRoot is required across multiple environments, for instance development, staging, and production environments. With absolute WebRoot each of these environments will have unique WebRoot.

To eliminate this limitation, the concept of VirtualRoot is supported. Using VirtualRoot requires setting an environment identifier (`sites.environment`) in the `wcs_properties.json` file to identify that they are valid for the given environment; if the parameter is missing then the WebRoot is used. It is important to determine and understand the types of WebRoots as you can have reason to have both absolute and relative roots defined at the same time.

The following table lists the advantages and disadvantages of these types of WebRoots.

Table 57-1   Advantages and Disadvantages of WebRoot Types

WebRoot Type	Advantages	Disadvantages
Absolute WebRoot	• Full URL opens to the Content Contributor	• A unique URL is required for every environment. • Virtual roots require setting a WebCenter Sites property. • Difficult to test vanity URLs before publishing.
Relative WebRoot	• Single WebRoot works across all Systems • Vanity URLs can be easily tested before publishing	• Content Contributors do not see the full URL, only the Path. • May require additional steps in rewriting the URL.
Combination	• Full URL opens to the Content Contributor • Single WebRoot works across all Systems • Vanity URLs can be easily tested before publishing	• More URLs are present and must be stored/published. • Content contributors will see both relative and absolute WebRoot URLs. Since there are more URLs it can be confusing to the Content Contributor.

58

(Optional) Configure Function Privileges for the Workflow Process

◀ WebCenter Sites Help

1. Find the workflow process and open its **Inspect** form.

2. In the action bar, click **Edit**.

   The Edit form opens.

3. Click **Add/Edit Function Privileges** at the bottom of the form.

   The Functions for Workflow Process form opens.

4. Scroll down to the function for which you want to set a privilege.

5. Click **New** next to the function.

   The **Add Function Privilege** form opens.

6. Select the appropriate state from the **State** list.

7. In the **Roles** list, select the roles that are allowed or not allowed to perform this function when an asset is in this state.

8. Do either of the following:

   • To allow users with the selected roles to perform the function, select the **Allowed** check box.

   • To restrict users with the selected roles from performing the function, clear the **Allowed** check box.

9. Click **Add New**.

   The privilege is saved, and the Functions for Workflow Process form opens.

10. Repeat steps 3 to 8 for each function privilege that you must configure. For more information about function privileges, see Determining Function Privileges in *Administering Oracle WebCenter Sites.*

11. After you have configured all of your function privileges, click **Save**.

    The process is saved. The Workflow Process form opens.

The workflow process is complete.

59

Editing Actions and Conditions

◀ WebCenter Sites Help

1. In the **Workflow** node, expand **Actions**.

2. Under **Actions**, expand the category describing the action you want to edit.

   The available categories are: **Step Actions**, **Step Conditions**, **Timed Actions**, **Delegate Actions**, **Deadlock Actions**, or **Group Deadlock Actions**.

3. Under the selected category, double-click the action you want to edit.

4. In the action bar, click **Edit**.

5. Make your changes, and then click **Save**.

60

Clearing Workflow Assignments

◀ WebCenter Sites Help

People go on vacation, get reassigned to new work groups, and move on to different jobs. What should happen to their workflow assignments in these situations? One option for handling work assignments that cannot be finished by the original assignee is to delegate the assignments to someone else. However, even with the delegate feature, the administrator can still clear assignments from some user's assignment list.

To clear assignments for a user:

1. In the **General Admin** tree, expand the **Workflow** node, and then double-click **Clear Assignments**.

   The Search for Assignments form opens.

2. Enter a user name and click **Show Assignments**.

   The **Clear Assignments** form opens, showing a list of assets that are currently assigned to that user.

3. Select the **Clear** check box next to each assignment to clear.

4. Optional: In the **Clear assignment comment** field, enter a brief explanation of the reason for which you are clearing the selected assignments. The explanation you enter in this field opens in the **Action Taken** field in the **Workflow History** section of the asset's **Status** form.

5. Do either of the following:

   • If you want the asset to be removed from workflow if it is not assigned to anyone else, select **Yes**.

   • If you want the asset to remain on the assignment list of any other user who is also assigned the asset, select **No**.

6. Click **Clear Assignments**.

   The Clear Assignments Report summarizing your changes opens.

61
Setting Up Email Objects

◀ WebCenter Sites Help

You create email objects so that your step and timed actions can send them to the appropriate participants at the appropriate times. Examine the sketches of your workflow processes, determine the email messages you must have, and then use the procedures in this section to create and edit them.

Your user account must give you access to the **Admin** node, under the **General Admin** tree, in order for you to create email objects.

To ensure that your workflow process can successfully send email messages, the following conditions must be true:

- The following properties must be configured to provide information about your email server:
  - `cs.emailaccount`
  - `cs.emailauthenticator`
  - `cs.emailcharset`
  - `cs.emailcontenttype`
  - `cs.emailhost`
  - `cs.emailpassword`
  - `cs.emailreturnto`

- The `xcelerate.emailnotification` property must be set to `true`.

  For information about the properties cited above and using the Property Management Tool, see "Properties in the Core Category" in the *Property Files Reference for Oracle WebCenter Sites*.

- The workflow participants must have email addresses specified in their user profiles. For information about creating user profiles, see "Working with User Profiles and User Attributes" in *Administering Oracle WebCenter Sites*.

The following topics in *Administering Oracle WebCenter Sites* provide instructions for working with email objects:

- Creating Email Objects
- Editing Email Objects
- Deleting Email Objects

62

Setting Up the Timed Action Event

◀ WebCenter Sites Help

Before any of your timed actions can be triggered, you must configure the timed action event so that it calculates deadlines at regularly occurring intervals. Note that there can be only one timed action event per WebCenter Sites system.

1. In the **Workflow** tab, double-click **Timed Action Event**.

2. In the action bar, click **Edit**.

   The Edit Workflow Timed Action Event opens.

3. Set the schedule for how often the state deadlines should be calculated in terms of months, days, hours and minutes, depending on the selected interval. Selected values are highlighted in blue. All values are toggled separately, so it is not necessary to use Ctrl to select multiple values.

   The method of setting a timed action event is similar to the method for setting a publication event. For more information, see the example schedule in the "Scheduling a Publish Event" in *Administering Oracle WebCenter Sites*.

4. In the **Enabled Dates and Times** field, select **Enabled**.

5. Click **Save**.

   A summary of the schedule opens.

WebCenter Sites uses the same abbreviations and codes to summarize the schedule for the timed action event that it does for your publishing events. For information about how to read the schedule, see "Reading the Schedule Abbreviations" in *Administering Oracle WebCenter Sites*.

63

Connecting to WebCenter Content

◀ WebCenter Sites Help

In this section, you will connect WebCenter Sites to WebCenter Content and specify which renditions (determined in "Determining Which Renditions to Synchronize" in *Administering Oracle WebCenter Sites*) must be available for use in the attribute mapping part of the connector rules.

To connect to WebCenter Content

1. From the **Connector Admin** tab, select **Configuration** to open the Connector Configuration form.

2. In the Connector Configuration form, fill in the following fields:

   a. In the **Server URL** field, provide the address of the WebCenter Content instance to connect to. The HTTP, HTTPS, or IDC protocols can be used. For more information about determining the URL path of a WebCenter Content instance, see *Administering Oracle WebCenter Content*

   b. In the **Server User** field, provide the name of a user with administration privileges for the WebCenter Content instance.

   > ✎ **Note:**
   >
   > If you specified the IDC protocol in the **Server URL** field, then you must define the user name as that of a local user with administrative privileges (by default, **sysadmin**).

   c. In the **Server Password** field, provide a password for the administrative user only if you specified an HTTP or HTTPS connection in the **Server URL** field.

   > ✎ **Note:**
   >
   > For IDC connections, a server password is not required. The IDC protocol uses a trusted port configured on the WebCenter Content server.

   d. In the **Rendition Names** field, add the names of all renditions you plan to import (as determined in "Determining Which Renditions to Synchronize" in *Administering Oracle WebCenter Sites*).

   To add a rendition, click **Add New Rendition** and enter its name. If you add a video rendition, use a colon-separated format such as `media:rendition-name`. For example, `media:flash8`.

   The rendition types `primary` and `web` are provided by default. You can keep or delete them, depending on your requirements.

3. Click **Test** to test your entries. If your entries are valid, a confirmation message opens.

4. Click **Save** to save the entries. A confirmation message opens when the configuration has been saved successfully.

64

Configuring Content and Experience Cloud with WebCenter Sites

◀ WebCenter Sites Help

You can configure Content and Experience Cloud with WebCenter Sites to enable the content contributors to access and use content that is available in the Content and Experience Cloud and use them to build sites.

To configure Content and Experience Cloud with WebCenter Sites through the Admin interface:

1. In the **General Admin** tree, expand the **Content Cloud Admin** node, and then double-click **Console**.

2. Click **Edit Configuration**.

3. In the Content Cloud Admin: Edit Configuration form, enter the **Base URL**, **Username**, **Password**, **Channel Name**, **Channel Token**, **Proxy Host**, and **Proxy Port**. See the following table for more information on these fields:

Fields	Description
Base URL	You can enter the Base URL of Content and Experience Cloud in this field. **Base URL** should be suffixed with `/content`. For example, `http://<content cloud host>/content`.
Username	You can enter the user name of the Content and Experience Cloud user in this field. **Username** should be prefixed with the domain name. For example, `domain1.bob@oracle.com`, where `domain1` is the name of the domain.
Password	You can enter the corresponding password of the Content and Experience Cloud user in this field.
Channel Name	You can specify the name as WebCenter Sites. It is a read-only field where the channel name is fixed.
Channel Token	Initially this field is empty. Click **Refresh Token** to get the token for the WebCenter Sites. It is also a read-only field.
Proxy Host	The hostname of your proxy server.
Proxy Port	The port number of your proxy port.

4. (Optional) Click **Test** to verify the connection between WebCenter Sites and Content and Experience Cloud.

5. Click **Save** and then click **Synchronize Content** to start the synchronization process.

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> **✎ Note:**
>
> To schedule synchronizations between WebCenter Sites and Content and Experience Cloud, you can click **Set Sync Event** in the Content Cloud Admin: Console page. After you set the schedule for synchronization in the Set Sync Event page, click **Save** to save the sync schedule.

65

Manually Running the Connector

◀ WebCenter Sites Help

In this topic, you manually run the connector to test the rules you configured and prioritized in "Creating an Active Rule" and "Prioritizing Active Rules and Managing Rules" in *Administering Oracle WebCenter Sites*.

1. From the **Connector Admin** tab, select **Console** to open the Connector Console.

2. Verify that the Connector Console displays the information you specified in "Connecting to WebCenter Content" in *Administering Oracle WebCenter Sites*.

   • The **Server URL** field lists the address of the WebCenter Content instance.

   • The **Server User** field lists the user with administration privileges for the WebCenter Content instance.

3. Click **Run Now With Token**.

   The connector starts running and the token field displays the current token value. For more information about tokens, see Rolling Back the Synchronization Point in *Administering Oracle WebCenter Sites*.

   > ✏ **Note:**
   >
   > You can schedule the connector to run on a timed basis, as described in Scheduling the Connector in *Administering Oracle WebCenter Sites*.

4. While the connector runs, you can monitor its activity from the same form you are now using.

66

Viewing Connector History

◀ WebCenter Sites Help

All connector sessions are archived. You can view the entire archive, or selected batches (one by one). You can also drill down to individual content items for detailed information about their processing. Archived information can be deleted.

This topic contains the following sections:

- Viewing the Entire Connector History
- Viewing Connector History for a Single Batch

Viewing the Entire Connector History

To view connector history for all batches:

1. From the **Connector Admin** tab, select **History** to open the Connector History table.

2. The Connector History table displays the following information and options:
   - Each row of the Connector History table represents a batch. By default, the connector processes content items in batches, up to 50 items per batch.
   - Click the **Inspect this item** icon (magnifying glass) to view connector history for the selected batch. For more information, see the section "Viewing Connector History for a Single Batch".
   - The **Timestamp** column shows the date and time of batch processing.
   - The **Launched By** column lists whether batch processing was launched manually (from the Connector Console) by the named user, or launched automatically (AUTO) by the connector schedule in the `SystemEvents` table. For information about connector scheduling, see "Scheduling the Connector " in *Administering Oracle WebCenter Sites*.
   - The **State** column lists the batch processing state. Possible values are Submitted, Running, Cancelled, Error, Reset, or Finished. Click **Refresh** to view the updated state.
   - The **Batch size** column lists the number of items in the batch. By default, the maximum is 50 items per batch. For information about changing maximum batch size, see "Working With WCC Connector Configuration Files" in *Administering Oracle WebCenter Sites*.
   - The **Updated** column lists the number of items that are updated in WebCenter Sites during batch processing. The number includes assets that are created, updated, or deleted.
   - The **No Rule** column lists the number of items that did not match any rule.
   - The **Error** column lists the number of processing errors for this batch.
   - Select the **All** option and then click **Delete** to delete all activity listings.

- Select a batch (a row) and click **Delete** to delete that batch.

3. To view connector history for a single batch, select the batch. The Connector History table lists all items that were processed in the batch.

Viewing Connector History for a Single Batch

To view connector history for a single batch:

1. From the **Connector Admin** tab, select **History** to open the Connector History table.

2. Locate the batch (a row), and click its **Inspect** icon (magnifying glass).

   The Connector History table lists all items that were processed in the selected batch.

3. The Connector History table for a single batch displays the following information and options:

   - Each row represents a single item in the batch.

   - The **Content ID** column lists Content ID for each item in the batch.

   - The **Asset ID** column lists Asset ID for each item in the batch.

   - The **Status** column lists the synchronization status for each item in the batch. Common status flags are `Added`, `Error`, `Updated`, `Not Matched` (no rule matched), `Not Present` (asset not found), and `Deleted` (asset was deleted).

   - The **Remark** column provides additional information for each item in the batch. Toggle its **Show Details** icon (plus sign) or **Hide Details** icon (minus sign). For an example and descriptions of commonly returned messages, skip to step 4.

   - Click the **Back** button to go back to the previous table (which displays the history for all batches).

4. Some common messages are listed here:

   - `No valid rule found`: Indicates that either no rules are defined, or the defined rules are invalid.

   - `No record found`: Indicates that no record could be found in the database table, meaning that there are no entries for the particular table being viewed.

   - `Delete QueueToken {0}`: Value {0} is the token ID. This message indicates that the item from WebCenter Content is marked for removal from WebCenter Sites.

   - `Asset {0} deleted from site {1}`: Value {0} is the $assetType\_assetID$. Value {1} is the site name. This message confirms deletion of the listed asset from the specified content management site.

   - `Asset deleted`: Confirms asset deletion.

   - `Asset not found`: Typically, this message means that an attempt was made to locate an item to delete, but the item has been deleted.

   - `Asset created: {0:1} to sites: {2}`: Value {0:1} is the asset type and asset ID. Value {2} is the site name or a comma-separated list of site names. This message indicates that the listed asset was created in the listed site or sites.

- `Asset updated: {0:1} to sites: {2}`: Value {0:1} is the asset type and asset ID. Value {2} is the site name or a comma-separated list of site names. This message indicates that the listed asset was updated in the listed site or sites.

- `Asset {0} delete failed from site {1} because: {2}`: Value {0} is the asset ID. Value {1} is the site name. Value {2} is a message as to why the deletion failed. Typically, a deletion fails because the asset was modified since the last synchronization session and now has references to it. If deletion fails, the item is listed in the Orphaned Content form (see "Managing Synchronized Assets" in *Administering Oracle WebCenter Sites* for more information).

- `Checkin QueueToken {0}`: Value {0} is the token ID. This message indicates a queue token check-in request, that is, a new or updated item is ready to be imported into WebCenter Sites from WebCenter Content.

- `Rule matched {0}, Wcc request: {1}`: Value {0} is the rule name. Value {1} is the WebCenter Content rendition or conversion that was requested in the attribute mapping section of the rule.

- `No rule matched`: Indicates that no rule matched the item (compare with `No valid rule found`).

- `Rule matched {0}, but mappings not found`: Value {0} is the rule name. This message indicates that a rule matched the item being imported from WebCenter Content, but no mappings of metadata to attributes were found.

- `Rendition {0} was not returned`: Value {0} is the rendition name. This message indicates that WebCenter Content did not return the requested rendition (often due to the rendition not being available). Compare with `Available Renditions` and `Requested Renditions not available`.

- `Available Renditions: {0}`: Value {0} is a list of the available renditions for the item on WebCenter Content.

- `Requested Renditions not available`: Indicates that the requested rendition is not available. See `Available Renditions` for a list of available renditions.

- `Error on field {0}, fieldDef: {1}:{2}`: Values {0} and {1} are the attribute name (the values are identical). Value {2} is the error message for the exception. This message is returned when an unknown or unexpected exception occurs while the connector is mapping a content item metadata field to an attribute.

5. Before automating synchronization to run routinely, verify the imported content to ensure it is stored in the intended asset types and with the expected level of detail. Continue to "Verifying Imported Content" in *Administering Oracle WebCenter Sites*.

67
Orphaned Content

◀ WebCenter Sites Help

One task that synchronization cannot accomplish is deleting synchronized assets that have dependents. This results in orphaned content.

Orphaned content is an asset that you cannot delete when its counterpart content item is either deleted, expired, or disabled from synchronization (by having its **Sync To Sites** option set to `False`). You cannot delete the orphaned asset because dependencies were created on that asset since the last synchronization session.

> **✎ Note:**
>
> If a synchronized asset is shared across content management sites, it is deleted, unless it has dependents.

To determine orphaned assets:

1. From the Admin interface, in the **General Admin** tree, open the **Connector Admin** node.

2. Select **Orphaned Content** to open the Connector Orphaned Content table.

   The Connector Orphaned Content table shows the following columns, which identify the deleted source content items, the orphaned assets, and their dependent assets:

   - The **Content ID** column lists Content IDs for the content items that were deleted or disabled from synchronization in WebCenter Content.

   - The **Connector Token** column lists the `update_number` for the token, from which you can derive the date and time when the content items were processed by the connector. You can obtain date and time from the WCS Queue Support Information table, described in "Rolling Back the Synchronization Point" in *Administering Oracle WebCenter Sites*.

   - The **Asset ID** column lists the orphaned assets by their WebCenter Sites asset IDs.

   - The **Referenced By** column lists the dependent assets (which reference the orphaned assets).

   - The **Remark** column lists additional information (if any) for orphaned assets.

3. Use the Connector Orphaned Content table to locate the orphaned assets in WebCenter Content. More information about deleted content items is available in WebCenter Content.

68
Prioritizing Active Rules and Managing Rules

◀ WebCenter Sites Help

An important aspect of managing rules is to enable them for the connector and prioritize them in order of execution. The order can determine how the connector distributes content items among the target asset types in a synchronization session. For more information about prioritization, see "Connector Rules" in *Administering Oracle WebCenter Sites*.

You can complete other operations, such as editing, deleting, and adding rules in the same form you use to enable and prioritize rules.

To prioritize and otherwise manage rules:

1. From the **Connector Admin** tab, select **Rules** to open the Connector Rules form.

2. To prioritize rules for the connector, continue with this step (otherwise, skip to step 3 for descriptions of all the rule management options, such as editing and deleting, in the Connector Rules form):

    a. Ensure that the rules you want to prioritize have their **Enabled** check box selected.

    b. Click the **Move Up** or **Move Down** arrows to change the rule order. Enabled rules are executed by the connector in the arranged order. If a content item matches one active rule, the content item is synchronized according to that one rule. All other rules for synchronizing that content item are ignored.

    c. Click **Save**.

3. To perform any of the possible operations listed on the Connector Rule form, see the list below for descriptions of your options:

    • Click the **Edit** icon (pencil) of a rule to edit that rule. The rules wizard opens. For information about configuring rules, see "Creating an Active Rule" in *Administering Oracle WebCenter Sites*.

    • Click the **Delete** icon (trash can) of a rule to delete that rule.

    • Click the **Move Up** or **Move Down** arrows to change the rule order. Enabled rules are executed during connector polling in the arranged order. If a content item matches one active rule, it is synchronized according to that one rule. All other rules for processing that content item are ignored.

    • Select or deselect the **Enabled** option of a rule to enable or disable that rule. Click **Save** after making any changes.

> ✏️ **Note:**
>
> – If a rule is disabled, that rule and its matching content items are ignored by the connector when it runs.
>
> – If an active rule is executed and then disabled (or deleted), content items imported according to that rule remain in WebCenter Sites.

- In the **Name** column, click the rule name to view or edit that rule. The rules wizard opens.

- The **Description** column provides the rule description. This description is defined when you create a rule.

- Click **Add New Rule** to add a new rule. The rules wizard opens.

- Click **Save** to save any changes, such as enabling or disabling a rule.

4. After you have optimized, enabled, and prioritized your active rules, continue to Manually Running the Connector.

69

Configuring Google Analytics Account and Eloqua Instances

To configure a Google Anaytics account:

1. In the **General Admin** tree, expand the **External Integrations** node, and then expand the **Configurations** node.

2. In the New Configuration form, enter the **Name** of the new Google Analytics account that you want to configure, select the **Type** as ABTEST, and then click **Continue**.

3. In the Configuration form, select the site for which you want to configure the Google Analytics account from the **Sites** field or select **Any** from the **Sites** field to configure the Google Analytics account for all the sites.

> **Note:**
>
> You can configure multiple sites with the same Google Analytics account by selecting multiple sites from the **Sites** field. You can press **Ctrl** and select multiple sites.

4. Enter the values for the following fields:

   - **abtest.ga.account.id**
   - **abtest.ga.profile.id**
   - **abtest.ga.application.name**
   - **abtest.ga.keyfile.name**
   - **abtest.analytics.provider**
   - **abtest.ga.proxy.address** (Optional)
   - **abtest.ga.proxy.password** (Optional)
   - **abtest.ga.proxy.port** (Optional)
   - **abtest.ga.service.email**
   - **abtest.ga.proxy.protocol** (Optional)
   - **abtest.ga.proxy.username** (Optional)
   - **abtest.ga.webproperty.id**

   > **Note:**
   >
   > See Properties in the A/BTest Category

5. Click **Save**.

You have configured a Google Analytics account to create A/B tests.

Configuring Eloqua Instances in WebCenter Sites

You can configure multiple Eloqua instances with WebCenter Sites. You can use these instances for different business units of your organization. Different business units of an organisation may have their own subscriptions with Eloqua that can be used with the sites they own in WebCenter Sites. With the ability to configure multiple Eloqua instances with WebCenter Sites, it's possible for the business units to use their Eloqua subscription with their sites alone.

To add an Eloqua instance:

1. In the **General Admin** tree, expand the **External Integrations** node, expand the **Configurations** node, and then double-click **Add New**.

2. In the New Configuration form, enter the **Name** of the new Eloqua instance that you want to configure, select the **Type** as ELOQUA, and then click **Continue**.

3. In the Configuration form, enter **eloqua.companyname**, **eloqua.username**, **eloqua.password**, **eloqua.loginurl**, **eloqua.baseurl**, and **eloqua.apiprefix**.

> **Note:**
>
> - The login parameters **eloqua.companyname**, **eloqua.username**, and **eloqua.password** are the ones that you use to log in to the Eloqua website.
>
> - In the field **eloqua.loginurl**, enter the login URL of the Eloqua website and in the field **eloqua.baseurl**, you can enter the URL that you get after logging into the Eloqua website.
>
> - The value of **eloqua.apiprefix** field should always be `/API/REST/2.0`.

4. Click **Save**.

Your Eloqua instance is configured with WebCenter Sites and you can find it listed under the **EloquaForm** node in the **Content Tree** tab of the Contributor interface.

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Configuring Timeline

◀ WebCenter Sites Help

The Timeline feature is disabled by default. You can configure this feature either using the Property Management or the Timeline option in the Admin UI.

> **Note:**
>
> If you enable or disable this feature using the Property Management option, the same changes will be reflected in the Timeline UI or vice versa. After you enable or disable this feature, you need to restart the server and reload the Contributor UI.

To configure the Timeline feature using the Timeline UI, you must do the following:

1. Log in to the Admin interface as a general administrator.

2. In the General Admin tree, click the **Timeline > Configure** option.

3. In the Timeline:Configure page, fill in the details as follows:

   • Select the **Enabled** or **Disabled** option.

   • From the Select Asset Types list, select any asset type.

   • The list of **Default Supported Asset Types** is displayed.

   • Select the **Manage Revision Tracking** link to track the asset revisions.

     – In the Manage Revision Tracking page, enter the number in the **Revisions to keep** field and select the assets for which you want to track the revisions and then click **Save**.

     – If you want to remove the tracked revisions of the asset types, specify the date in the **Remove Excess Revisions** field and then click **Save**.. All the tracked revisions before that date will be removed.

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About the Publish Console

Throughout RealTime publishing, you will use the Publish Console. In the Publish Console, the system communicates information about current, scheduled, and past publishing sessions for all configured publishing destinations.

To open the Publish Console, log in to the Admin interface and click **Publishing** on the button bar.

- The **Active tab** shows a summary of ongoing publishing sessions that were triggered from the Admin and Contributor interfaces. While a publishing session is underway, you can open the Publishing Status form to learn detailed information about the publishing process in real-time. You can also explore interactive logs. Upon completion of the publishing session, you can download text logs. Information about the functions on the **Active** tab can be found in "Working with Active Publishing Sessions" in *Administering Oracle WebCenter Sites*. Information on working with logs can be found in "Viewing and Searching Logs" in *Administering Oracle WebCenter Sites*.

- The **Schedule tab** displays the number of approved assets for each destination and the schedule of publishing sessions. More information about using the functions on the **Schedule** tab can be found in "Working with Scheduled Publishing Sessions" in *Administering Oracle WebCenter Sites*.

- The **History tab** shows summary information on prior publishing sessions. More information on working with the **History** tab can be found in "Working with Prior Publishing Sessions" in *Administering Oracle WebCenter Sites*. From this tab, you can also access logs of prior publishing sessions. For information about logs, see "Working with Publishing Logs" in *Administering Oracle WebCenter Sites*.