Oracle® Fusion Middleware

WebCenter Sites User's Guide

11*g* Release 1 (11.1.1.8.0)

E29605-01

July 2013

ORACLE®

Oracle Fusion Middleware WebCenter Sites User's Guide 11*g* Release 1 (11.1.1.8.0)

E29605-01

Contents

3   Creating, Sharing, and Editing Assets in Form Mode

4   Creating, Sharing, and Editing Assets in Web Mode

5 Deleting Assets

6 Finding and Organizing Assets

7 Previewing Assets

8 Associating Assets

9 Linking Assets

10 Creating a Website's Navigation

11 Working with Multilingual Assets

19   Creating and Configuring Recommendations with Engage

20   Creating Promotions with Engage

21 Navigational Reference

22 The Flex Asset Model

Part II Using the Community Application

23 Welcome to the Oracle WebCenter Sites: Community Application

24 Getting Started

25 Working with the Comments Widgets

26   Working with the Reviews Widgets

27   Working with Ratings Widgets

28   Working with the Login Bar Widget

29   Working with Polls

30   Configuring Community Widget Settings

31   Testing Deployed Community Widget Tags

Part III   Creating Blog Content

32   Creating Blog Content

Part IV   Using the Gadgets Application

33   Introducing the Oracle WebCenter Sites: Gadgets Application

34   Getting Started

35   Re-configuring Gadget and Dashboard Settings

36 Deploying Gadgets and the Dashboard

37 Testing Deployed Gadgets

Glossary

Preface

This guide provides an overview for using Oracle WebCenter Sites, Oracle WebCenter Sites: Community, Oracle WebCenter Sites: Community Blogs module, and Oracle WebCenter Sites: Gadgets.

Audience

This document is intended for content providers – anyone who creates, reviews, and approves content from the WebCenter Sites Contributor interface, the WebCenter Sites: Community interface, and/or the WebCenter Sites: Gadgets interface. Typically, content providers are specialists in fields such as corporate communications, finance, human resources, sales, and marketing. The content providers' expertise is rooted in the content, not in the software used to manage it. Technical proficiency is not required.

This document is also helpful to individuals who support content providers, perform their functions, or simply need to understand basic concepts of WebCenter Sites and its related applications.

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

For more information, see the following documents in the Oracle WebCenter Sites Release 11*g*R1 documentation set:

- *Oracle WebCenter Sites Certification Matrix*

- *Oracle Fusion Middleware WebCenter Sites Release Notes*

- *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*

- *Oracle Fusion Middleware WebCenter Sites Developer's Guide*
- *Oracle Fusion Middleware WebCenter Sites Installation Guide*

Conventions

The following text conventions are used in this document:

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

What's New in This Guide

This preface introduces the new and changed features of Oracle WebCenter Sites 11*g* Release 1 (11.1.1.8.0) and other significant changes that are described in this guide, and provides pointers to additional information. This includes information about the changes to the WebCenter Sites Contributor interface, the WebCenter Sites: Community application's interface, and the Oracle WebCenter Sites: Gadgets application's interfaces.

New Features for Oracle WebCenter Sites Version 11*g* Release 1 (11.1.1.8.0)

Oracle WebCenter Sites 11*g* Release 1 (11.1.1.8.0) includes the following new features:

- New features in the Oracle WebCenter Sites Contributor interface include:
  - Support for Vanity URLs, which includes the ability to define and manage a vanity URL for any asset that will be published to your website. See Section 3.4.
  - Support for bulk copy and bulk share operations on assets. See Section 3.1.3.2 and Section 3.2.3.
  - Added the ContentQuery asset type, which allows users to save their search criteria as an asset of type ContentQuery. See Section 6.5.2 and Section 18.4.
  - Added tagging capabilities, which enables users to organize assets by adding tags to them and then conduct an advanced search to find all assets that have been tagged with the same content. See Section 6.6.2.
  - Support for integrating WebCenter Sites: Community and WebCenter Sites: Gadgets with the Contributor interface. This integration enables users to customize and deploy widgets and gadgets directly from the Contributor interface. See Chapter 12.
  - The new Mobility component in Oracle WebCenter Sites enables users to create multiple websites for various mobile devices (such as smart phones and tablets) within a single content management site. See Chapter 13.
  - Added the ability to approve site plans and Page assets for publishing from the **Site Tree**. See Section 14.2.2.
- New features in the Oracle WebCenter Sites: Community interface include:
  - Added the option to post a reply to a comment as an administrator when managing comments in the "Comments by Topic" screen. See Section 25.2.2.

- – Added the option to enable or disable the Comments and/or Reviews widgets deployed on a given topic (web page). See Section 25.2.2 and Section 26.2.2.

- – Added functionality to the Login Bar widget. In the Login Bar settings screen, users can now: Enable integration with Oracle Access Management and disable or enable sharing of comments and reviews to third-party social networks such as Facebook, Twitter, and Google+. For more information, see Section 28.2.

- – Added two new columns to the "Cache Summary" screen:

  - * Max Elements On Disk

  - * Overflow to Disk

  For information about these two columns, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

- ■ New features in the Oracle WebCenter Sites Gadgets application interfaces include:

  - – Added the ability to reconfigure and deploy the LoginBar widget. This is the same Login Bar widget for the Community application. Therefore, any changes you make to the Login Bar widget in the Gadgets interface are applied to the Login Bar widget in the Community interface, and vice versa. For information about reconfiguring the Login Bar widget, see Section 28.2 and Section 35.2.

  - – Added the **Language** option (located under the **Settings** menu) in the Site Gadget Catalog interface. The "Language" screen allows users to configure a language preference for deployed gadgets. For more information, see Section 35.5.

Changed Features for Oracle WebCenter Sites Version 11*g* Release 1 (11.1.1.8.0)

Oracle WebCenter Sites 11*g* Release 1 (11.1.1.8.0) includes the following changed features:

- ■ Changed features in the Oracle WebCenter Sites Contributor interface include:

  - – Renaming of Form Mode and Web Mode to Form View and Web View. In this guide, any mention of Form Mode and Web Mode refers to Form View and Web View. For more information about Form View and Web View, see Section 1.1.2.

  - – Renaming of **SmartLists**. In previous releases, saved search criteria was referred to as a **SmartList**. With this release, saved search criteria is referred to as a **Saved Search**. For more information about **Saved Searches**, see Section 6.5.1.

  - – Improved Engage functionality:

    - * Improved the content entry forms for creating filtering rules for Recommendation assets. See Section 19.4.

    - * Changed the procedure for creating Segment assets. See Section 18.3.

- ■ Changed features in the Oracle WebCenter Sites: Community interface include:

- The CSS tag is now deployable for both community widgets and gadgets. Instructions for deploying the CSS tag for a gadget are included in the instructions for deploying the CSS tag for community widgets.

    This information has been moved into the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- Moved information about community widget tags into the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- Moved information about SEO support into the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- Changed features in the Oracle WebCenter Sites: Gadgets application interfaces include:

    - Moved information about the Global Gadget Catalog interface into the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

    - Moved information about enabling the Gadgets interfaces into the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

    - Moved information about registering gadgets to the Global Gadget Catalog or a site gadget catalog into the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

    - Removed OAuth support for this release.

    - Changed the menu bar options that are displayed in the Gadgets User interface:

        * The **Gadgets** menu has been renamed to **Catalog**. Additionally, gadgets are now deployed from the **Catalog** screen. As a result, the **Deployment** menu has been removed from the menu bar.

        * The **Dashboard** menu contains the **Preview** and **Deploy** options.

        * Added the **Login Bar** menu option

        * Added the **Settings** menu which contains the **Authorized Domain**, **Appearance**, and **Language** options.

        * Removed the **Permissions** menu. The **Authorized Domain** option is now under the **Settings** menu.

    For information about the menu options in the Gadgets interfaces, see Section 33.2.

- Added CSS tags for gadgets. In this release, users can deploy a CSS tag for gadgets and the dashboard. The instructions are the same as deploying a CSS tag for a community widget. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

Document Consolidation

This guide consolidates user's documentation that was once available in separate books. Topics that have been added to this guide are the following:

- Part II, "Using the Community Application" provides instructions for working with the Oracle WebCenter Sites: Community application as a user assigned the Moderator or Designer role.

- Part III, "Creating Blog Content" provides instructions for creating blog assets and categories, and modifying blog author assets.

- Part IV, "Using the Gadgets Application" provides information about the Oracle WebCenter Sites: Gadgets application and provides information about the permissions granted to users of the Gadgets User interface.

Deprecation Notice

The following features are deprecated in WebCenter Sites 11*g* Release 1 (11.1.1.8.0):

- Mirror publishing. This feature is replaced by RealTime publishing.
- Static publishing
- WebCenter Sites Desktop
- WebCenter Sites DocLink

Part I

Using the Oracle WebCenter Sites Contributor Interface

This part provides information on how to use the Oracle WebCenter Sites web application's Contributor interface.

Part I contains the following chapters:

1

Overview of WebCenter Sites

As a content provider, you create, manage, and deliver website content. Your expertise is rooted in the content, not in the software used to manage it. Since this guide is written specifically for content providers, it is intended to help you use Oracle WebCenter Sites efficiently to perform your content management tasks, without requiring technical proficiency.

This chapter contains the following sections:

- Section 1.1, "Introduction to Oracle WebCenter Sites"
- Section 1.2, "Exploring Content Management Concepts"
- Section 1.3, "What Can You Do in the Contributor Interface?"
- Section 1.4, "Features in the Contributor Interface"

1.1 Introduction to Oracle WebCenter Sites

Oracle WebCenter Sites enables you to create and manage content for publication to your website. The content is stored in the WebCenter Sites database. You create and manage the content using the WebCenter Sites Contributor interface, which provides a simple and intuitive way of accessing and working with the database.

The content that you manage depends on the nature of your organization: a news site might produce articles, photos, and video clips; a human resources department might manage job postings and personnel policies; an online retailer might offer product descriptions, special offers, coupons, and so on. Content can be moved from its creation on the content management (CM) system to its completion in steps, from person to person, in a process called **workflow**. Along the way, collaborators can modify and comment on the content and use revision tracking to audit changes made to the content. Your end goal is to **publish** content so that site visitors can view it. Publishing functions are available in the WebCenter Sites Admin interface.

1.1.1 From the Content Entry Form to the Website

When creating and editing content in WebCenter Sites, you use content entry forms which are located on the CM system. Their purpose is to give you an easy, intuitive way to store content in the WebCenter Sites database, without having to access the database directly. When ready for public delivery, the content can be published to the website using RealTime publishing. (For more information about publishing, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.)

For example, the RealTime publishing method publishes (copies) content from the CM system to the delivery system. The delivery system then delivers that content to the

website. The steps for publishing content to the website are shown in Figure 1–1 and Figure 1–2, and explained below:

Step 1, Figure 1–1. When you populate a content entry form (for example, the "Article" form) and save the content, WebCenter Sites stores the content in its CM system database.

Step 2, Figure 1–1. After you or another user approves the content and initiates the publishing process, the content is copied to the delivery system.

Step 3, Figure 1–1. When the content is requested by a site visitor, it is automatically retrieved from the delivery system, formatted, and laid out by code. This code is written by developers according to site designers' specifications.

Step 4, Figure 1–2. The formatted content is delivered to the visitor's browser.

In simple terms, a content entry form accepts raw content for storage in the CM system database. When published content is requested by a site visitor, the delivery system renders the content (unless it is already cached) in viewer-ready form in the visitor's browser.

> **Note:** As a content provider, and throughout this guide, you will work with the CM system to create, modify, and perform other processes on the content that is delivered to the website.

A content entry form represents an asset (which is described later in this chapter). Content entry forms can be displayed in two modes:

- *Form Mode* displays a traditional form view that allows you to enter content into fields (shown in Figure 1–1 and on the left in Figure 1–3). You can then use the *Preview* option to see how the content would be displayed on the website if it were published.

- *Web Mode* allows you to enter information into the web page view of the content (shown on the right in Figure 1–3), which shows you how the content you are creating will be displayed when published to the website as you are creating it.

Content entry forms offer the following advantages:

- Users don't need to learn the specifics of the WebCenter Sites database.

  A content entry form can be thought of as a window into the WebCenter Sites database. Content that you enter into a form is stored in the database. Content that you retrieve is read from the database and displayed in an editorial version of the content entry form.

  Because a content entry form provides a standard interface to the variety of databases that WebCenter Sites supports, it spares users from having to learn the specifics of any database in particular. If one database is replaced with another (for example, SQL Server is replaced with DB2) the switch is transparent to users.

- Users don't need to know HTML or other markup languages.

  No content entry form requires its users to format the content they enter or edit. A default format (specified in the templates) is applied when a user-defined format is unavailable. And when a field displays a WYSIWYG editor ("What You See Is What You Get"), you can use its tools to format the field's content – without having to know HTML. As a content provider, you have the option to remain strictly focused on the content, or to determine its appearance, as well.

- Work in a drag and drop environment

Certain fields in a content entry form may display a Drop Zone. Drop Zones support drag and drop functionality, which provides an easy way to associate one piece of content with another. Users can quickly find the desired content (by performing a search or so on), drag that content to the desired field's Drop Zone, and then drop the content into the field.

- Reusability and consistency are maximized.

  Each piece of content that you enter into a form can be reused as many times as necessary, in as many formats as necessary, in as many locations within the website as necessary. Reusability ensures consistency across the site by eliminating the need for re-creating content each time it must be used.

Figure 1–1   Content Entry Form (Displayed in Form Mode and Web Mode)
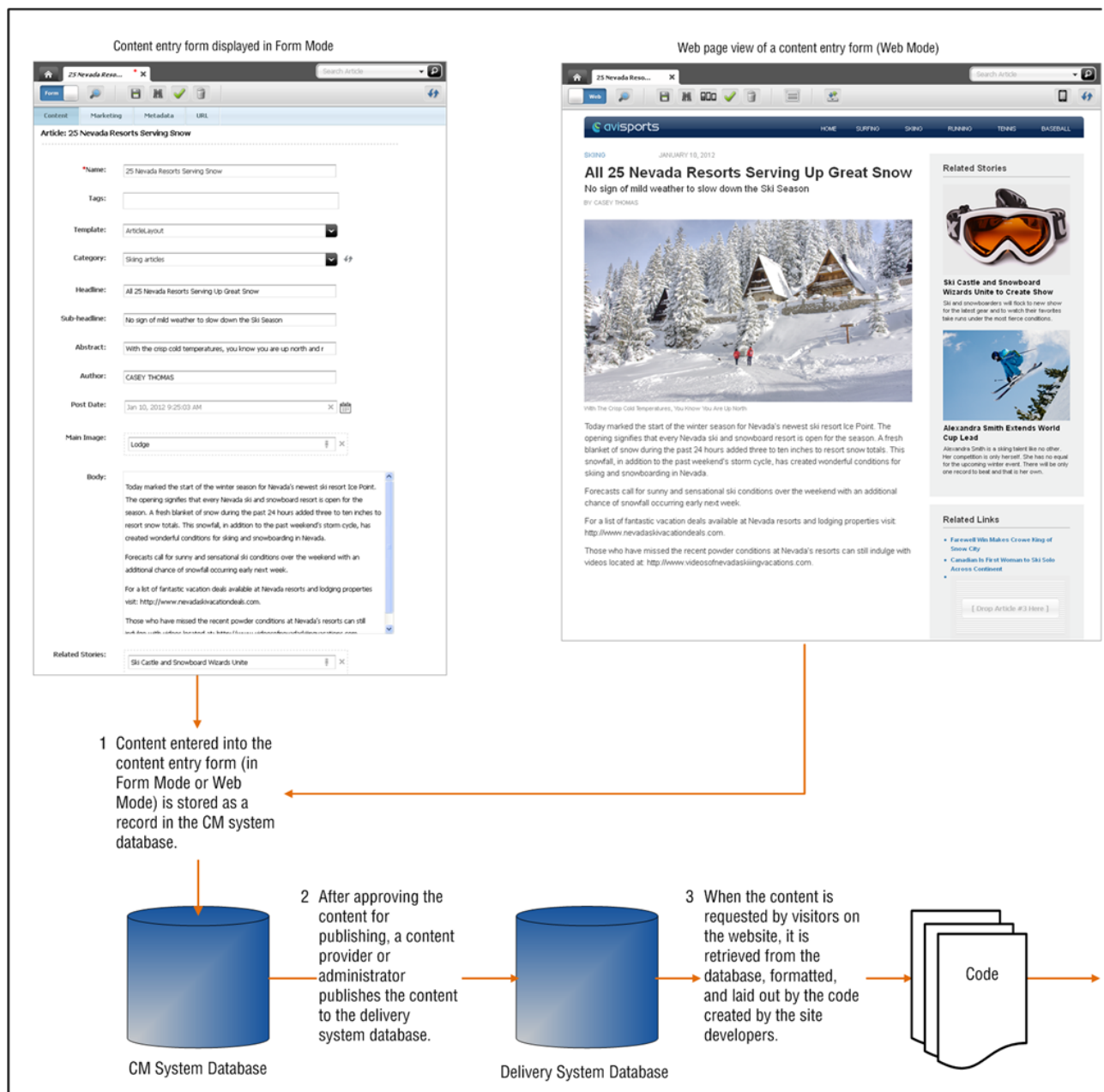
Figure 1–2 Website (Online Site)
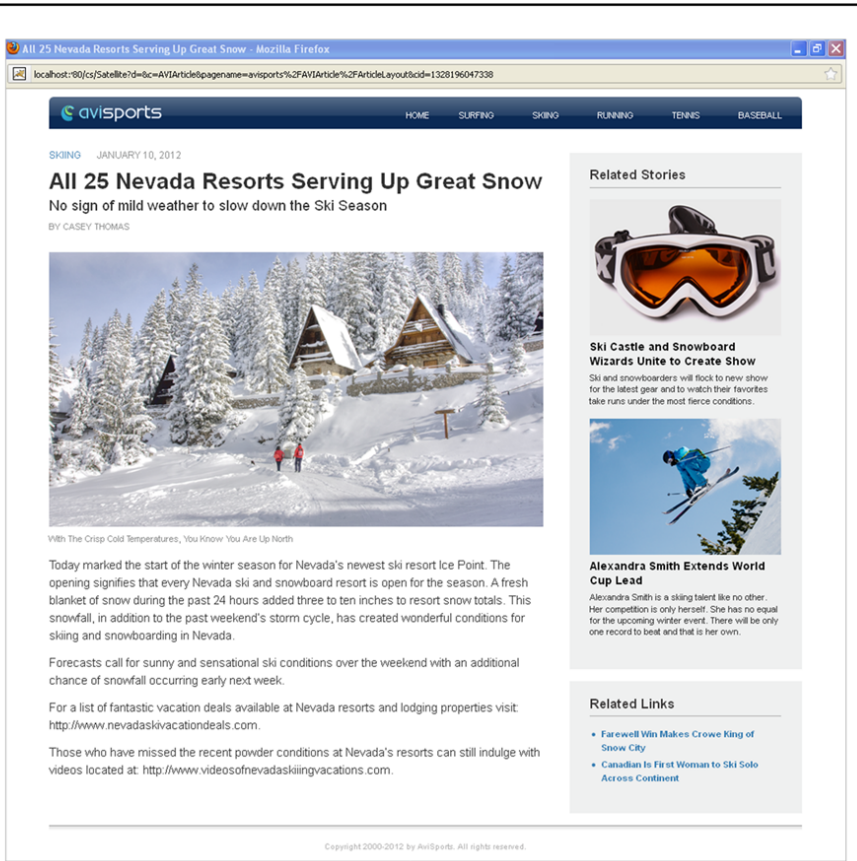
4 Formatted content is displayed on the website

1.1.2 Content Entry Modes

In the Contributor interface you can work with content entry forms using either *Form Mode* (shown in Figure 1–1 and on the left in Figure 1–3) or *Web Mode* (shown on the right in Figure 1–3).

> **Note:** In this release, Form Mode and Web Mode have been renamed to Form View and Web View. Throughout this guide, any mention of Form Mode and Web Mode refers to Form View and Web View.

Figure 1–3   Content Entry Form Displayed in Form Mode and Web Mode
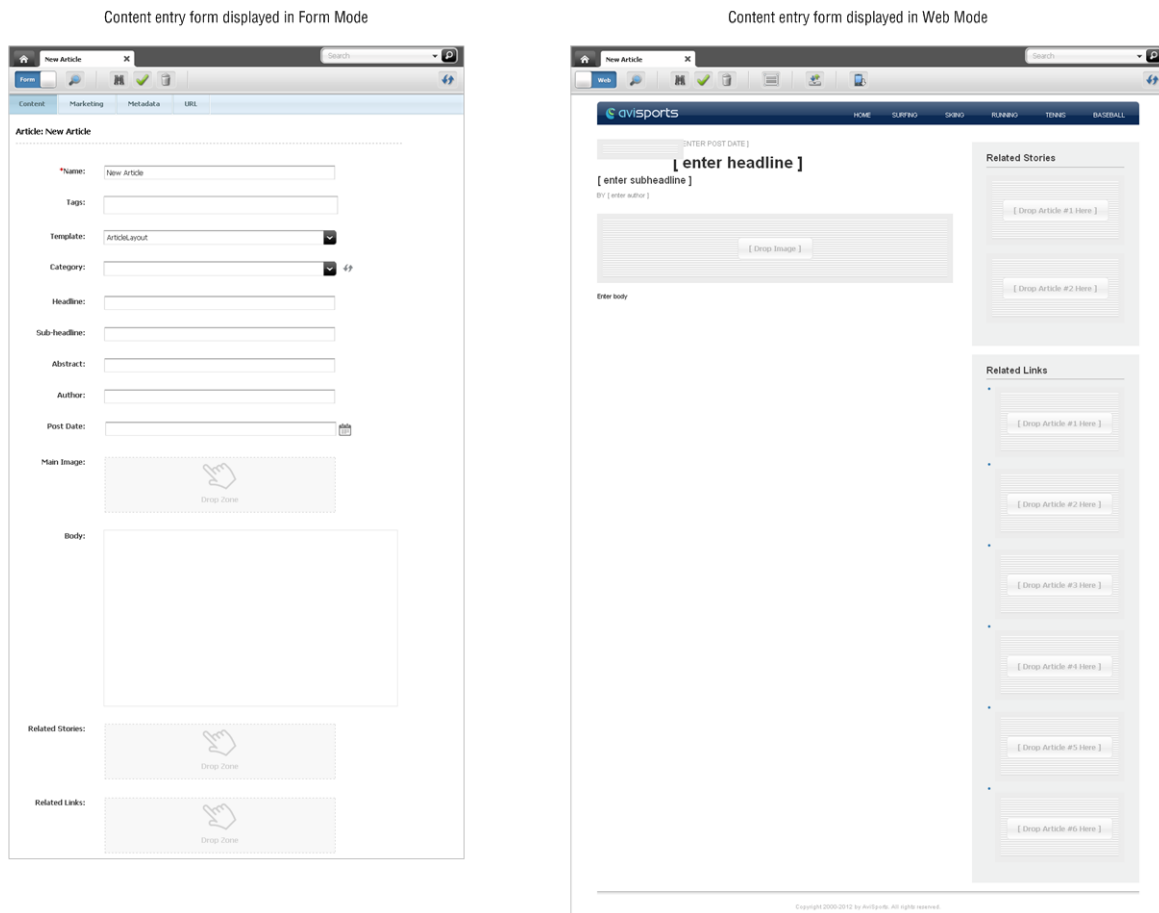
As you can see in Figure 1–3, Form Mode displays a content entry form in its traditional form view, which contains clearly labeled fields into which you can enter information for the content you are creating. On the other hand, Web Mode allows you to work with the web page view of a content entry form. Instead of fields, Web Mode displays slots, predefined sample information, and other editable areas into which you can enter information. The information you enter will be displayed on the website (once the content is published) exactly as it is displayed to you in Web Mode.

In addition to the ability to work in two different modes, the Contributor interface supports drag and drop functionality which is available in both Form Mode and Web Mode.

1.1.2.1 Working With a Drop Zone in Form Mode

When you work with content in Form Mode, you may see fields that support drag and drop functionality. A field that supports drag and drop functionality displays a Drop Zone. To populate a drag and drop field, you select a piece of content from a search results list or navigation tree and drop (place) that content into the field's Drop Zone (as shown in Figure 1–4).

Figure 1–4 Working with Drop Zones (Drag and Drop Fields)

Content entry form displayed in Form Mode, containing drag and drop fields into which you can drag and drop content such as an image.
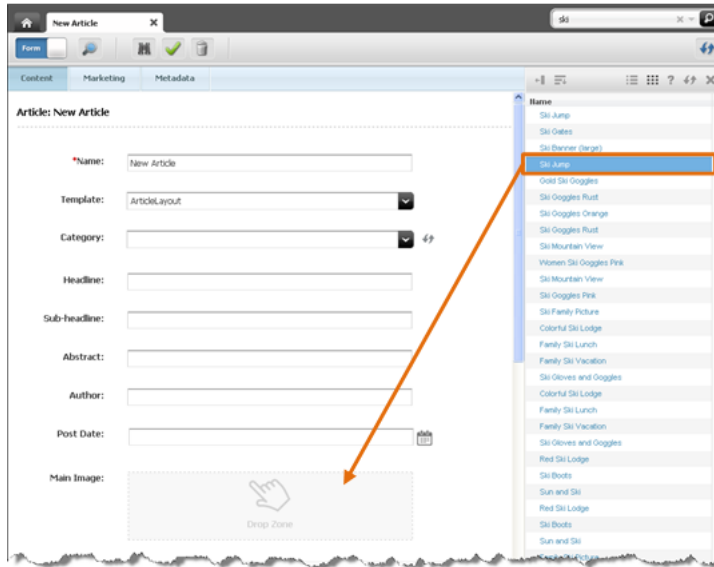
Drag the content to the field displaying a Drop Zone (drag and drop field).
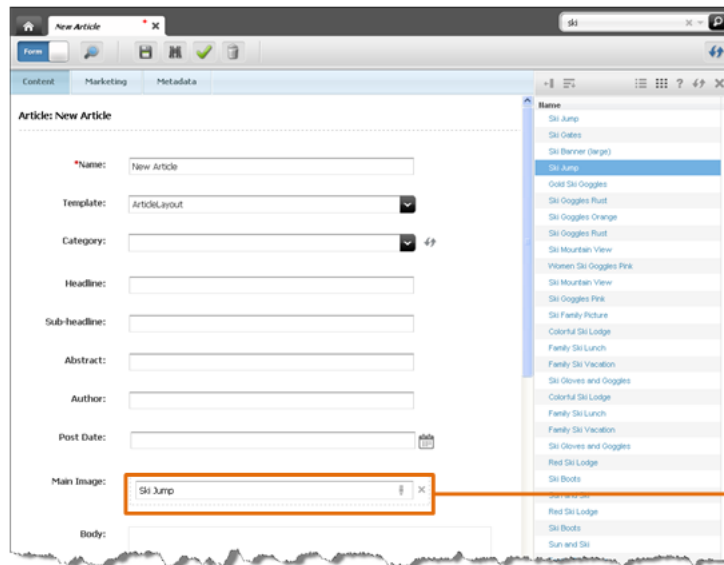
When you drop the content into the Drop Zone, the name of the content is displayed in the field.

For detailed information and instructions about working with content in Form Mode, see Chapter 3, "Creating, Sharing, and Editing Assets in Form Mode."

1.1.2.2 Working With a Slot (Coded with a Drop Zone) in Web Mode

When working with content in Web Mode, you may see slots that support drag and drop functionality. These slots are coded with a Drop Zone. A slot that is coded with a Drop Zone allows you to select a piece of content, from a tree or search results list, and then drag and drop (place) the selected content into it. The content is displayed in the slot as it would be displayed on the website, which enables you to visualize the associations you make between the pieces of content in your WebCenter Sites system (as shown in Figure 1–5).

Figure 1–5   Working with a Slot Coded with a Drop Zone

For detailed information and instructions about creating content in Web Mode, see Chapter 4, "Creating, Sharing, and Editing Assets in Web Mode."

1.1.3 Previewing Content

The *Preview* function enables you to view how the content you create or edit would look if it were published to the website. Unlike working with content in Web Mode, when you preview a piece of content you are not able to edit it (as shown in Figure 1–6).

Figure 1–6   Previewing Content
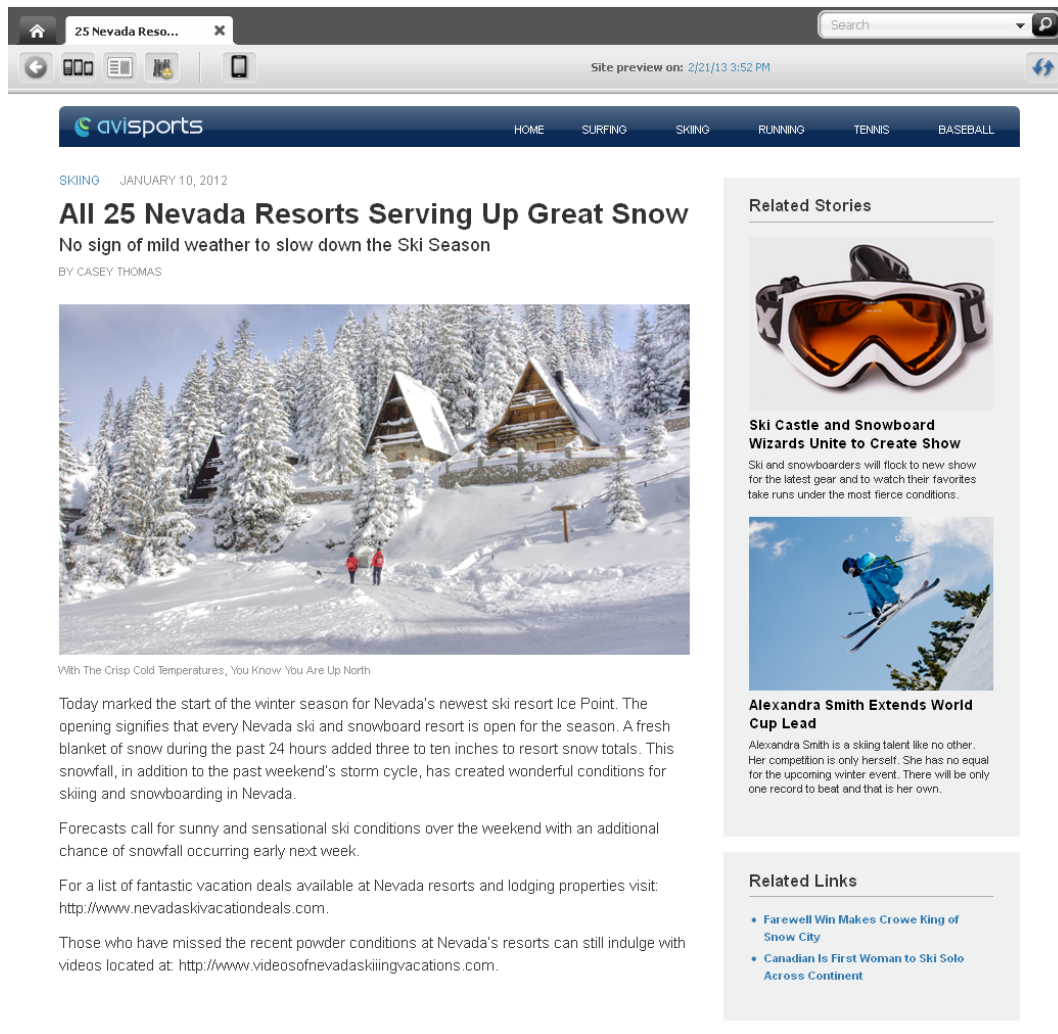
The preview function displays only the web page view of the content. It does not provide any options for editing the content you are previewing. If you wish to edit the content, you must work with it in either *Form Mode* or *Web Mode*. For information about switching to either Form Mode or Web Mode to edit an asset that you are currently previewing, see step b on page 2-21 in Chapter 7, "Previewing Assets."

1.2 Exploring Content Management Concepts

WebCenter Sites defines content in terms of assets, and asset types, which are used throughout this guide.

1.2.1 Content: Asset Types and Assets

Assets are content items that you manage using WebCenter Sites, for example, articles, product descriptions, advertisements, photos, and video clips. Assets are instances of asset types.

An asset type is an object that you use to create assets of that type. An asset type is represented by a content entry form, where the set of fields define the type of content you will provide.

For example, the content entry form in Figure 1–7 (A) belongs to an asset type named Article. Its fields "Headline," "Abstract," "Author," "Post Date," and "Body" prompt you for content that composes the article. The content entry form in Figure 1–7 (B) belongs to an asset type named Sports Cars and has a different set of fields "Name," "Engine Type," "Make," "Model," and "Price" that call for information about sports cars.

Figure 1–7   Content Entry Forms for the Article and Sports Car Asset Types

In our example, in Figure 1–8, we have the "Article" asset type from which content providers created the Finance Article asset, the Sports Article asset, the Gardening Article asset, and the Music Article asset (all of which are instances of the "Article" asset type).

Figure 1–8   'Article' Assets
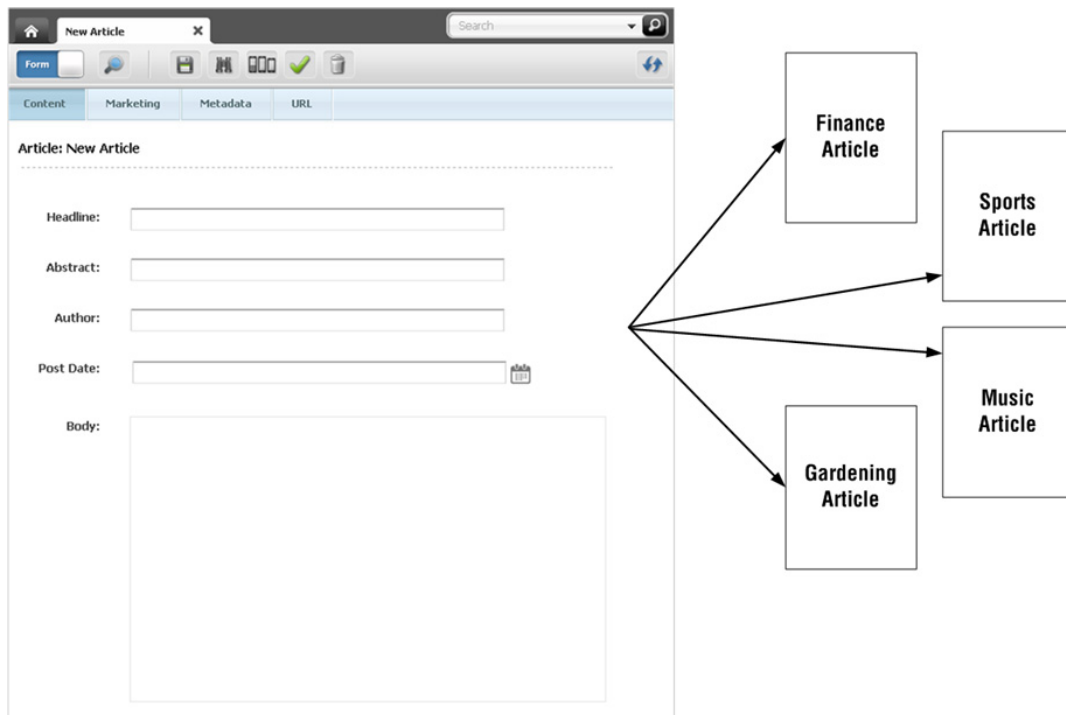
In the next example (Figure 1–9), we have the "Sports Car" asset type, with a different set of fields, from which content providers created the Lotus, Ferrari, Maserati, and Bughatti assets. All are instances of the "Sports Car" asset type.

Figure 1–9   'Sports Car' Assets
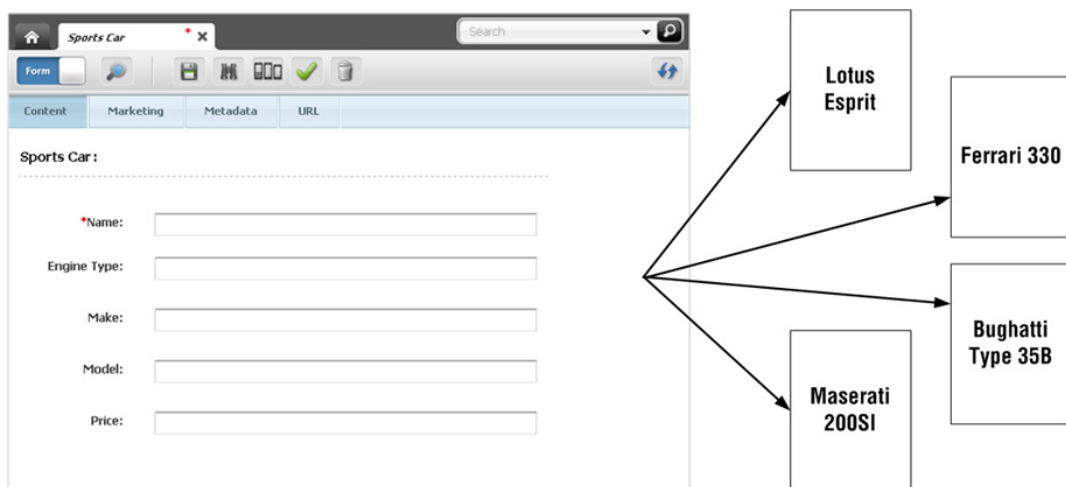
Typically, developers create many different asset types, giving you an appropriate range and type of content to create and publish. Each asset type has its own content entry form with a unique set of fields (as shown in Figure 1–7). When saved, an asset is stored in the WebCenter Sites database. The asset can be edited, inspected, deleted, duplicated, placed into workflow, tracked through revision tracking, searched for, and delivered to the website.

> **Note:** To be technically accurate, field names in a content entry form are *attributes*. The distinction is important to administrators and developers, but does not affect the content provider's work or understanding of content management in WebCenter Sites. For this reason, the terms "field" and "attribute" are used interchangeably throughout this guide.

1.2.2 Structured Content Assets and Document Assets

As a content provider, you are likely to manage two kinds of assets: **structured content** assets and **document** assets. The difference is that a structured content asset requires you to enter prescribed pieces of content directly into the WebCenter Sites interface, whereas a document asset requires you to provide a file with the content (or layout) of your choice. The developer who creates the asset type specifies whether the asset type supports structured content, or documents, or both.

Structured content is used to enforce uniformity, standards, and reusability. By contrast, file-based content is used when a free-style approach is acceptable. File-based content gives you the freedom to compose content of your own choice, and to present it in your own format.

- **When creating a structured content asset**, you enter the content directly into a form (as explained earlier). The fields impose content structuring by prompting you for specific information—for example, a headline, a byline, and body text (as shown in Figure 1–10).

Figure 1–10   Structured Content Asset

Structured Content Asset

When the content is published, its format and layout (predetermined by site designers) are implemented in the template that you choose to render the content.

- **When creating a document asset,** you enter content into a file of the format of your choice (for example, a Word document), then attach the file to the document asset. You then enter information describing the content, such as name, file size, format, or associated keywords, into the additional fields that developers might have created to help you describe the file and its content (as shown in Figure 1–11).

Figure 1–11   Document Asset

Document Asset

Depending on how your site is designed by developers, the assets you work with could contain a mixed set of fields – some for structured content and others for documents.

1.2.3 Multilingual Assets

If your organization maintains localized sites for different geographic regions, each piece of content you create is likely to be translated into languages other than the one in which the content was originally created.

WebCenter Sites allows you to assign a locale designation to each asset, and to group together assets that are translations of one another. This way, you can easily track, manage, and publish multiple translations of your content.

For example, a global press release written in English can be translated into French, Spanish, and German, and the translations published on the respective regional sites. The press release and its translations exist in the WebCenter Sites database as separate assets, linked with each other into a multilingual set. Members of multilingual sets can be managed, passed through workflow, approved, and published to one or more destinations just like their non-localized counterparts.

On the other hand, you are free to create assets in different languages and assign locale designations to them independently of one another, without creating the translation links. For example, you would treat in this way content that is specific to one region only and should not be translated nor published elsewhere.

When configuring your site for multilingual support, your developers provide the site visitors with a way to specify their preferred language. The delivery system then determines (by checking which locales are enabled for the site, and through locale filtering, if applicable) which translation of each asset is displayed on the website.

1.2.4 Design Assets

Structured content assets are called **design assets** if they are used to format and organize website content. Design assets are created by developers for your use. Your access to design assets depends on which design assets were created and on the permissions granted to you by your WebCenter Sites administrator. The following list describes the design assets you can use (given the appropriate permissions).

- **"Template" assets** create the look and feel of the website. As a content provider, you assign "Template" assets to structured content assets to apply specific formatting to your content. Each "Template" asset formats assets of a specific type. How your site developers code the templates determines how an asset's content entry form is displayed in Web Mode and how the asset will be displayed on the website. Consult your site developers for instructions on how to work with the "Template" assets available to you.

- **"Page" assets** are "containers" that reference the assets constituting a page (or a portion of a page) in the website; they provide the structure and organization for the displayed content.

   When you create a page asset, you determine its appearance by selecting a layout (template asset) from the options provided to you by your developers. You can also modify an existing page asset by invoking it from the **Site Tree** or a list of search results.

1.2.5 WebCenter Sites Data Models

Asset data models define how content is stored in the WebCenter Sites database—in either a flat (single-level) or hierarchical (multi-level) structure. In WebCenter Sites, the flat model is referred to as the basic model, and the hierarchical model as the flex model.

The data model is chosen by the developers during asset type creation to suit site design requirements. In most of your tasks as a content provider, the distinction between the asset models is not relevant, since the majority of the functions you perform in WebCenter Sites are the same whether you are working with basic or flex assets. This guide indicates when a function or situation is unique to either basic or flex assets. Consult your administrator to determine the assets model(s) used on your site.

1.2.5.1 Basic vs. Flex

The differences between the basic and flex asset models are summarized below:

- **Basic assets** are instances of basic asset types and always have the same set of properties (attributes), as defined by the asset type. They can be associated with other assets to form single-level "parent-child" dependencies, but they cannot inherit each other's properties. Thus, no complex hierarchies can be created with the basic asset model.

- **Flex assets** have the ability to inherit structure and content from multiple parents and grandparents, which makes them excellent for building complex hierarchical data structures (for example, creating large online catalogs of products). Unlike basic assets, flex assets in a given flex family can have different properties (attributes) based on the established hierarchy and inheritance rules set up by the administrator. For more information, see Chapter 22, "The Flex Asset Model."

1.2.6 Content Management Sites

A content management (CM) site is the backend for the website or one of its sections, and like everything else in WebCenter Sites, it is stored in the WebCenter Sites database. A CM site is the structural and logical framework that references several types of information:

- A CM site references all of the assets, asset types, and asset relationships that constitute the actual website (or a section of it).

  You can view a hierarchical representation of the site design for the CM site you are logged in to by clicking the **Site Tree** bar in the navigation pane. For example, a section of the site tree for the avisports sample site looks like Figure 1–12:

Figure 1–12   Site Tree for the avisports Sample Site
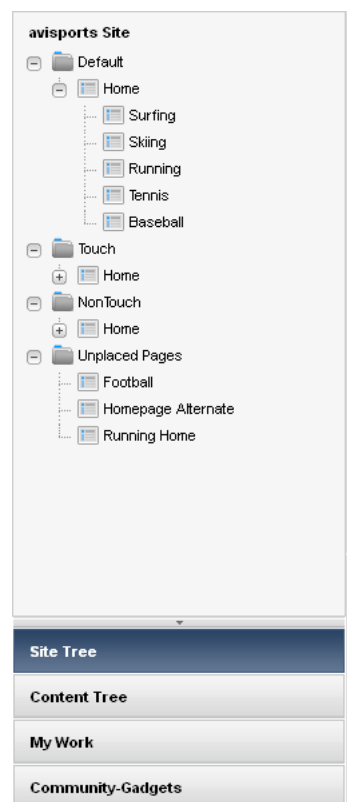
Notice the hierarchical structure in which the content is organized.

- A CM site also references the users, roles, and workflow processes used to manage and organize the site's content. The WebCenter Sites administrator is responsible for managing these objects. Which CM sites you can work with is determined by the permissions granted to you by the WebCenter Sites administrator.

If you have permissions to work with more than one site, a site select screen appears when you log in to Oracle WebCenter Sites, allowing you to select the CM site and the application you want to work with. If you have permissions to work with more than one application that is associated with the site, select the icon for the **Contributor** interface. You can also switch between CM sites during your session using the "Sites" drop-down menu located on the applications bar. To access the applications bar, click the **down-arrow** at the extreme right of the menu bar.

Once you are granted access to a site, the administrator also grants you permissions to perform specific tasks within the site. For example, you may have the permissions to edit assets but not delete them.

It is important to note that a CM site is not synonymous with the website that visitors see in their browsers. For example, a small website might have all of its assets contained in one CM site. A very large web site, on the other hand, might be divided into several sections, each contained in and managed through a separate CM site. A WebCenter Sites CM site is thus the supporting structure behind the actual website (or a section of it), but they are not one and the same.

> **Note:** Throughout this guide, the phrase "current site" refers to the CM site you are logged in to at the time, and not the website that the visitors access.

1.3 What Can You Do in the Contributor Interface?

The Contributor interface provides the features listed in Table 1–1 which you will use to work with assets. Whether you can access the assets and how you can work with them is determined by the following:

- The role(s) assigned to your user name by the administrator. These roles grant you the permissions to work with features of the Contributor interface. If you do not have the right permissions, the function (such as creating content) is unavailable to you – it is either grayed out, hidden from your interface, or it produces an error message when you attempt to use it.

- Your access permissions (which are roles-based) determine the content management functions you can perform on individual assets (functions such as creating, viewing, or editing assets).

- Whether an asset is part of a workflow and whether that asset is assigned to you or another user. If the asset is assigned to another user, you will not be able to work with it.

- If revision tracking is enabled and another user has checked out the asset you wish to work with, you will not be able to edit or delete that asset until the user checks the asset back in.

- If an asset exists on your current site because it was shared from another site, you can work with that asset only in its native site (the site on which it was created).

- If a publishing session is running and the asset you are accessing is being published, you will not be able to edit or delete that asset until the publishing session is complete.

- If Community-Gadgets is integrated with the WebCenter Sites Contributor interface, and you are assigned the appropriate roles to work with the Community and Gadgets applications (**GeneralAdmin**, **SiteAdmin**, and **Designer**), widget

and gadget assets are accessible to you in the Contributor interface and you will see the **Community-Gadgets** tree displayed in the navigation pane.

1.4 Features in the Contributor Interface

Table 1–1 lists the features available in the Contributor interface. Features that are not supported by the Contributor interface, are available only in the WebCenter Sites Admin interface.

Table 1–1   Features in the Contributor Interface

Features in Contributor Interface	Description	See...
Edit Assets	Edit assets in the following ways: ■ Create, copy, and edit assets in Form Mode ■ Create, copy, and edit assets in Web Mode ■ Add, replace, remove, position assets on a Page ■ Delete assets	Chapter 3, "Creating, Sharing, and Editing Assets in Form Mode" -and- Chapter 4, "Creating, Sharing, and Editing Assets in Web Mode"
WYSIWYG Editors	Work with the following WYSIWYG editors: ■ CKEditor ■ DatePicker ■ Image Picker ■ Clarkii Online Image Editor (OIE)	Section 3.5, "Working with Attribute Editors"
Search for and Inspect System-Defined Asset Types	The asset types are: ■ Template ■ CSElement ■ SiteEntry ■ DimensionSet ■ Dimension ■ Parent Definitions ■ Attributes ■ Flex Definitions	Chapter 6, "Finding and Organizing Assets"
Finding Assets	Find assets in the following ways: ■ Perform simple searches powered by Lucene ■ Perform advanced searches powered by Lucene ■ Sort search results ■ Save search criteria ■ Search attribute values ■ Visually browse a site's structure (site plan) ■ Visually browse flex family hierarchies	Chapter 6, "Finding and Organizing Assets"

Table 1–1 (Cont.) Features in the Contributor Interface

Features in Contributor Interface	Description	See...
Organizing Assets	Organize assets in the following ways: ■ Work with the **History** node (which lists assets you have worked with in the current session) ■ Share assets across sites ■ Bookmark assets for future reference	Section 6.6, "Organizing Assets"
Preview Assets	Preview assets in the following ways: ■ Set start/end dates for when assets can be previewed. ■ Preview assets as they will appear at the current time ■ Preview assets as they will appear at a future date ("Site Preview")	Chapter 7, "Previewing Assets"
Asset Associations	Associate assets in the following ways: ■ Associate assets with other assets ■ Assign templates to assets ■ Assign assets to Pages ■ Work with collections ■ Place and unplace Pages in the **Site Tree**	Chapter 8, "Associating Assets"
Linking Assets using CKEditor	Use the CKEditor to link assets in the following ways: ■ Create a hypertext link to another asset ■ Link two assets by inclusion ■ Link two assets via an image asset ■ Link two assets via "Image Picker" ■ Create a link to a URL	Chapter 9, "Linking Assets"
Embedding Links	The following list applies to standard text fields and fields enabled with a supported WYSIWYG editor (CKEditor): ■ Embed links to other assets ■ Embed contents of other assets by reference ■ Embed links to external web sites	Section 9.3, "To Create a Hypertext Link to Another Asset" -and- Section 9.5, "Linking Assets to URLs"
Multilingual Assets	Work with multilingual assets in the following ways: ■ Assign locale designations to assets ■ Work with linked translations of content	Chapter 11, "Working with Multilingual Assets"
Community and Gadget Assets	Work with community and gadget assets in the following ways: ■ Access the **Community-Gadgets** tree ■ Search for widget and gadget assets ■ Deploy widget and gadget assets	Chapter 12, "Working with Widgets and Gadgets in the Contributor Interface"

Table 1–1   (Cont.) Features in the Contributor Interface

Features in Contributor Interface	Description	See...
Mobile Websites	Work with the Mobility component in the following ways: ■ Create or copy content assets and Pages for a mobile website ■ Create or copy the site navigation for a mobile website ■ Edit content in the context of a mobile device ■ Preview content in the context of a mobile device ■ Approve mobile site plans for publishing	Chapter 13, "Creating Mobile Websites"
Publishing	Participate in the publishing process in the following ways: ■ Approve assets for publishing ■ Remove assets from the publishing queue	Chapter 14, "Approval for Publishing"
Revision Tracking	Work with revision tracking in the following ways: ■ Track revisions to assets ■ Roll assets back to previous versions	Chapter 15, "Revision Tracking"
Workflow	Participate in the workflow process as follows: ■ Pass assets through workflow ■ Work with workflow groups ■ Work with workflow reports	Chapter 16, "Workflow"
Engage	Work with Engage assets in the following ways: ■ Work with Segments ■ Rate assets for Segments ■ Work with Promotions ■ Work with Recommendations	■ Chapter 18, "Grouping Visitors into Segments with Engage" ■ Chapter 19, "Creating and Configuring Recommendations with Engage" ■ Chapter 20, "Creating Promotions with Engage"

2

Getting Started

This chapter describes how to log in to and use the WebCenter Sites Contributor interface.

It includes the following sections:

- Section 2.1, "Sample Sites Used in This Guide"
- Section 2.2, "Logging In"
- Section 2.3, "Quick Tour"

2.1 Sample Sites Used in This Guide

Procedures in this guide use the avisports and FirstSite II sample sites to illustrate how to use content management functions in the WebCenter Sites Contributor interface. You will have access to these sample sites only if they were installed with your WebCenter Sites system. If no sample sites were installed, contact your WebCenter Sites administrator.

The sample sites used in this guide are:

- **avisports** – a sports-centric sample site containing sports articles illustrated with images. In this guide, avisports is used to illustrate features in the WebCenter Sites Contributor interface such as creating and editing assets in Form Mode and Web Mode, deleting assets, associating assets, linking assets, approving assets for publishing, finding and organizing assets, tracking assets with revision tracking, and creating a site's navigation.

- **FirstSite II** – an online electronics retail site that includes articles, images, a product catalog with several product entries, documents, and sample user accounts. In this guide, FirstSite II is used to illustrate the workflow, multilingual, and preview features in the WebCenter Sites Contributor interface. FirstSite II is also used to describe Engage and the process of creating and working with segments, recommendations, and promotions in the Contributor interface.

FirstSite II and avisports both utilize the best practices in WebCenter Sites CM site development. Additionally, the code for both sample sites can be reused and modified to suit your organization's business needs.

2.2 Logging In

Follow instructions in this section to log in to the WebCenter Sites Contributor interface.

To log in to Oracle WebCenter Sites

1. Open your browser and enter the Oracle WebCenter Sites URL.

   `http://<server>:<port>/<context>/login`

   where `<server>` is the host name or IP address of the server running WebCenter Sites, `<port>` is the port number of the WebCenter Sites application, and `<context>` is the name of the WebCenter Sites application that was deployed on the server.

   > **Note:** Keep in mind the following:
   >
   > - If you need login information, see your WebCenter Sites administrator for the following: WebCenter Sites URL, your user name and password, and the list of supported browsers.
   >
   > - To more easily follow the steps in this guide, you can log in to either the avisports or FirstSite II sample site. Both sites are used, interchangeably, throughout this guide to illustrate the WebCenter Sites application. In step 2, use the following credentials:
   >
   >   **Username:** fwadmin
   >
   >   **Password:** xceladmin

   The Oracle WebCenter Sites login screen is displayed.

   Figure 2–1   WebCenter Sites Login Screen

2. Log in to WebCenter Sites:

   a. Enter your user name and password into the login screen.

   b. If you want WebCenter Sites to store your credentials and enter them automatically the next time you log in, select **Remember me**.

   c. Click **Login**.

3. If you are logging in for the first time, the screen in Figure 2–2 is displayed; otherwise, you are logged in to the application you last visited:

Figure 2–2   Site Select Screen
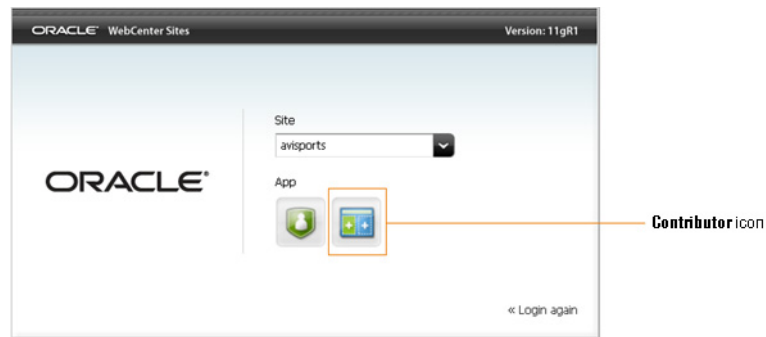
Select the site to which the Contributor application is assigned, and the **Contributor** interface icon.

The WebCenter Sites Contributor interface loads.

  – If you logged in to avisports, you will see the interface shown in Figure 2–3:

Figure 2–3   Contributor interface for the avisports sample site
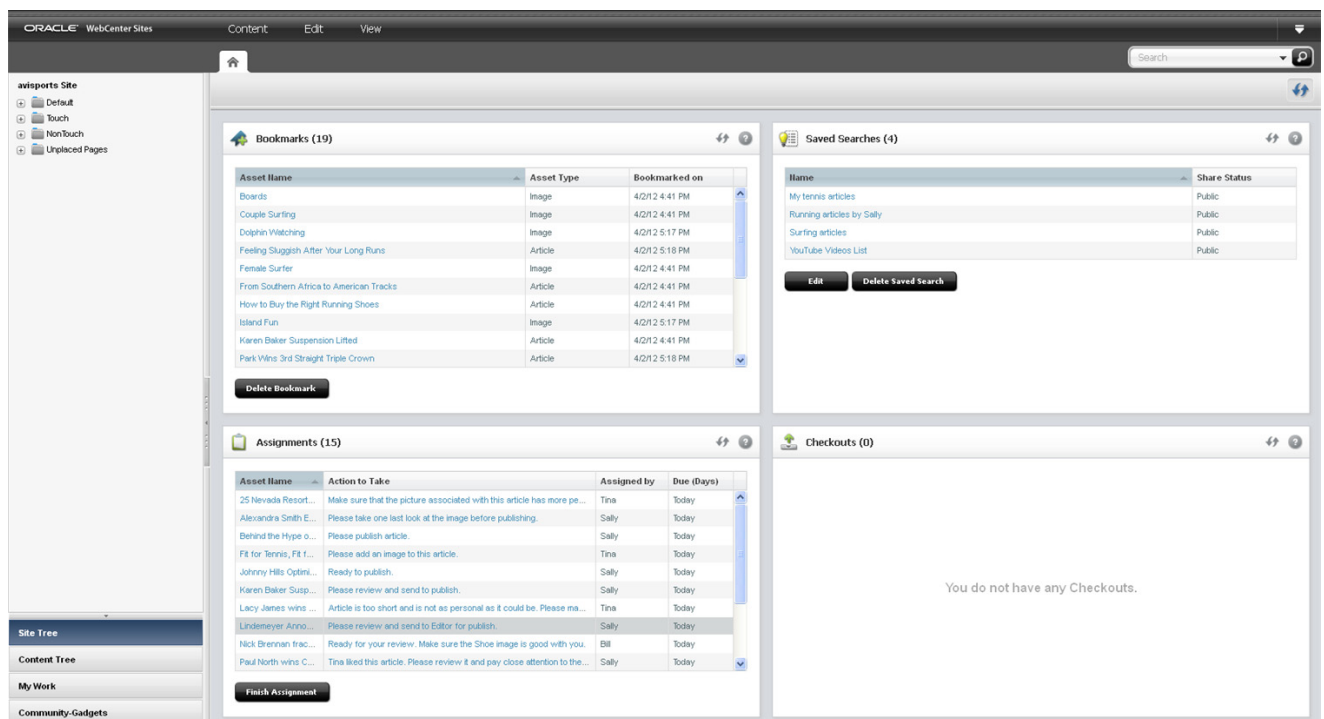
  – If you logged in to FirstSite II, you will see the interface shown in Figure:

Figure 2–4   Contributor Interface for the Firstsite II Sample Site
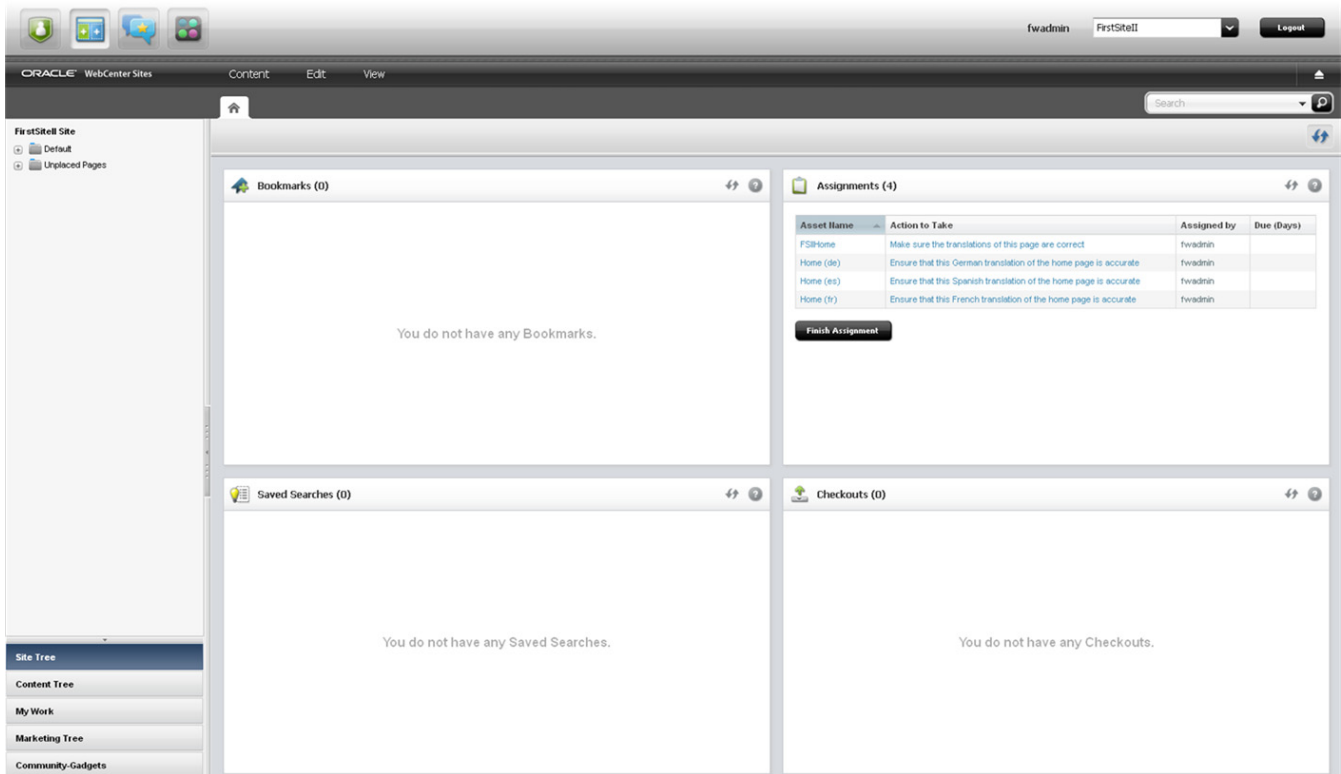
4. Proceed to the Section 2.3, "Quick Tour."

2.3 Quick Tour

1. If you are not already logged in to WebCenter Sites, log in as the `fwadmin` user (password: `xceladmin`) and access avisports. For instructions, see Section 2.2, "Logging In."

   WebCenter Sites opens the Contributor interface, which displays your dashboard, located on the **Home** tab (Figure 2–5).

2. Browse the Contributor interface to familiarize yourself with the different content management operations you can perform.

Figure 2–5   The Contributor Interface Dashboard for the avisports Sample Site

Your dashboard displays widgets that provide quick access to your saved search criteria, bookmarked assets, workflow assignments, and assets you have checked out using revision tracking.

> **Note:**   **What are permissions to content?** Here, you logged in as `fwadmin` which grants you access to the entire Contributor interface. In reality, the access you have to the Contributor interface is focused on certain tasks such as creating or editing content or both. For more information about permissions, see Section 1.4, "Features in the Contributor Interface".

In the rest of this section, you will complete the following exercises:

– Create an Asset

– Find and Open an Asset

– Switch Between Form Mode and Web Mode

– Edit an Asset in Form Mode

– Edit an Asset in Web Mode

– Preview an Asset

- Additional Ways of Accessing Assets

- Switch to a Different Site

- Log out of WebCenter Sites

2.3.1 Create an Asset

1. In the menu bar, select **Content**, **New**, and then *select the type of asset you wish to create* (in this example, we select the **Article** asset type).

Note: In the Contributor interface, most content management functions are accessible from the menu bar.

---

2. The Contributor interface provides two modes for working with assets – Form Mode and Web Mode. The mode in which you create assets is determined by your site administrator. Continue to one or both of the following sections:

- To create an asset in Form Mode

- To create an asset in Web Mode

To create an asset in Form Mode

If the asset type is configured such that all assets of that type open in Form Mode, the content entry form for the new asset is displayed in the tab, as shown in Figure 2–6.

Figure 2–6 Asset Displayed in Form Mode

1. Fill in the fields. For information about the different fields, see step 4 in Section 3.1.2, "Creating a New Asset in Form Mode."

2. Save the asset and close the tab. In the menu bar, select **Content**, then select **Save & Close**.

   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.

To create an asset in Web Mode

If the asset type is configured such that all assets of that type open in Web Mode:

1. In the "Create *Asset*" dialog box, select the desired layout, enter a name for the asset you are creating, and then click **Continue**.

   The tab displays the new asset's content entry form in Web Mode, as shown in Figure 2–7:

Figure 2–7   Asset Displayed in Web Mode
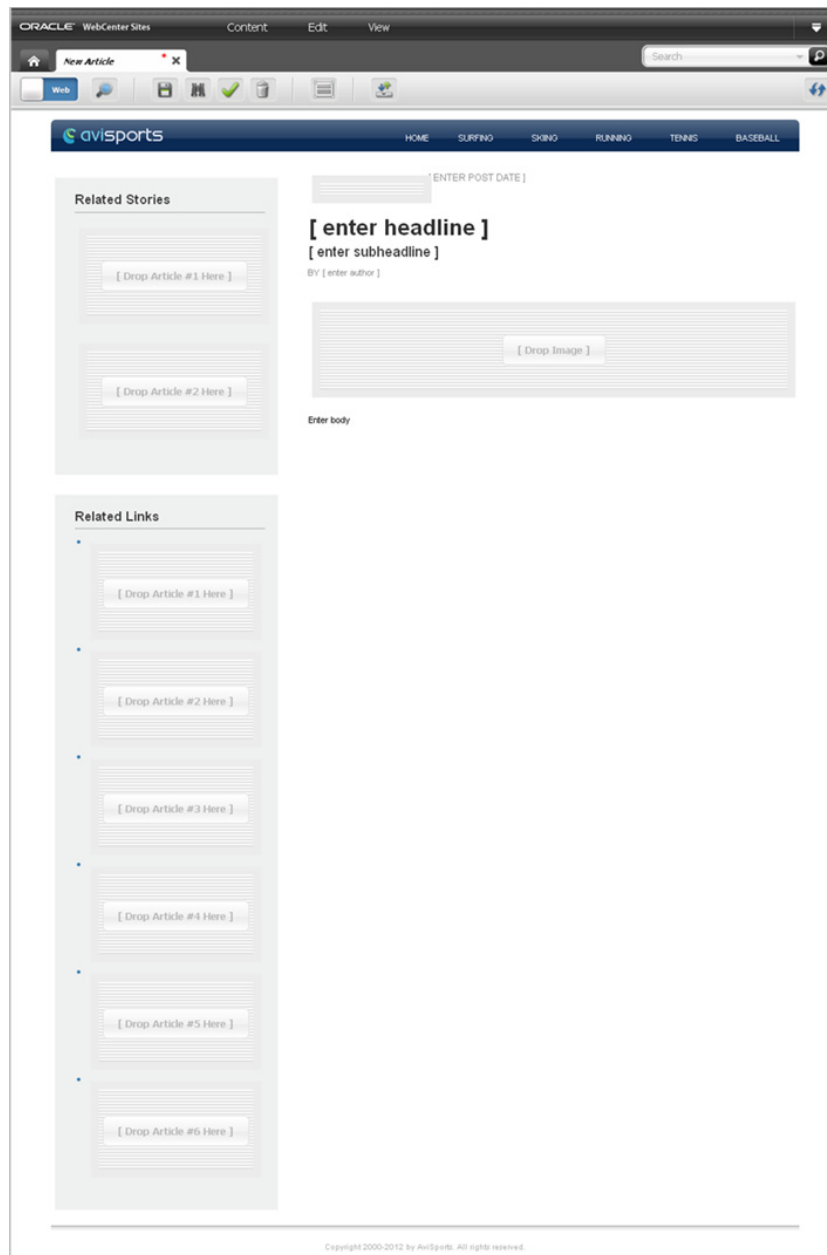
2. Point to the different areas of the asset to determine which areas accept content. Areas that accept content become highlighted when you point to them.

3. Click in the highlighted areas to determine the type of content each area supports. Then, populate the asset's Create view. For information about the different fields, see step 7 in Section 4.2.3, "Creating a New Asset in Web Mode."

4. Depending on how your developers have coded the layout (template) assigned to the asset, certain fields may only be available in Form Mode. In this case, switch to Form Mode and fill in the fields. For instruction about switching between Form Mode and Web Mode, see Section 2.3.3, "Switch Between Form Mode and Web Mode."

5. Save the asset and close the tab. In the menu bar, select **Content**, then select **Save & Close**.

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.

2.3.2 Find and Open an Asset

Now that you have created an asset, you can find it by performing a search in the Contributor interface. For example, say the asset you created in the previous section contains the word "ski":

1. In the **Search** field, enter **ski**.

Figure 2–8   Search Field

a. If you want to narrow your search results down to a specific asset type, click the **down-arrow** icon in the **Search** field. In the "Search Type" list, select the desired asset type.

If you do not narrow your search down by asset type, WebCenter Sites will search for any asset that contains the word "ski."

b. If you want to further narrow your search down (such as searching for a specific attribute) you can conduct an advanced search:

   a. In the **Search** field, click the **down-arrow** icon.

   b. In the "Search Type" list, click **Advanced Search**.

   c. In the "Advanced Search" form, enter the desired search criteria into the available fields.

   For more information about searching for assets, see Chapter 6, "Finding and Organizing Assets."

2. If you are running a regular search or an asset type search, click the **magnifying glass** button in the **Search** field. If you are running an advanced search, click **Run Advanced Search** in the "Advanced Search" form.

A "Search" tab opens in the workspace displaying a list of assets matching your search criteria.

Figure 2–9 'Search' Tab

The search results list shows a brief summary of information about each item in the list, such as name, asset type, and modification date.

3. In the list of search results, do the following:

   a. Click a column heading to sort the search results by the selected criterion. To reverse the sort order, click the same column heading again.

   b. Click the **Next** arrows at the bottom right of the screen to go to the next page of results; click the **Previous** arrows to go to the previous page.

   c. **Bookmark** select assets to easily retrieve them at a future time. Bookmarking an asset adds it to the **Bookmarks** node in the **My Work** tree (in the navigation pane) and in the "Bookmarks" widget on your dashboard.

      For instructions on bookmarking assets, see Section 6.6.1.1, "Bookmarking Assets." For information about accessing assets from the trees in the navigation pane, see Section 2.3.7, "Additional Ways of Accessing Assets."

4. Open an asset's Inspect view from the search results list:

   a. In the list of search results, click the name of the desired asset (in this example, we open the **25 Nevada Resorts Serving Snow** "Article" asset).

      You can also right-click the name of an asset to render a menu of content management functions you can perform (as shown in Figure 2–10).

Figure 2–10   Context Menu Displayed for Asset's Listed in the 'Search' Tab

A tab opens in the workspace, showing the asset's Inspect view in either Form Mode or Web Mode. In Figure 2–11 the asset is displayed in Form Mode.

Figure 2–11   Asset Inspect View Displayed in Form Mode

b. Inspect your asset, and any information relating to it.

- If you are in Form Mode, select different sections of the form. The form sections you see are determined by how your WebCenter Sites developers have configured the asset's type.

- If you are in Web Mode, the tab displays the asset as it would be displayed on the website. Therefore, you will not see a form section selector. Depending on how your developers coded the layout (template) assigned to the asset, certain fields (that you see in Form Mode) may not be shown in Web Mode. To view and modify these fields you will have to switch to Form Mode.

2.3.3 Switch Between Form Mode and Web Mode

When working with an asset, you can switch between Form Mode and Web Mode. For example, if an asset opens in Form Mode and you want to work with the asset in Web Mode, you can use the **Mode** switch in the asset's toolbar to switch to Web Mode and vice versa.

1. If the asset is not already open, find and open the desired asset. For instructions, see Section 2.3.2, "Find and Open an Asset."

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

2. Switch between Form Mode and Web Mode. Do the following:

   - If the asset opens in Form Mode, switch to Web Mode by clicking the **Mode** switch in the asset's toolbar (as shown in Figure 2–12).

Figure 2–12   Mode Switch on an Asset's Toolbar (in Form Mode)
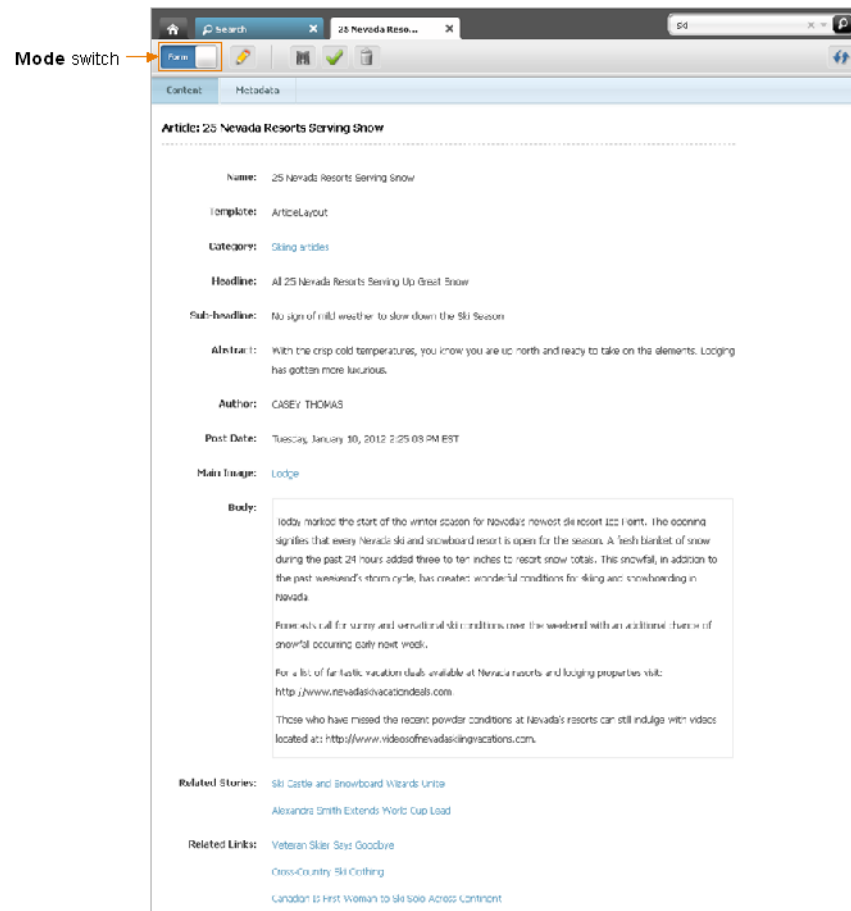
The tab re-displays the asset in Web Mode.

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

Figure 2–13   Mode Switch on an Asset's Toolbar (in Web Mode)
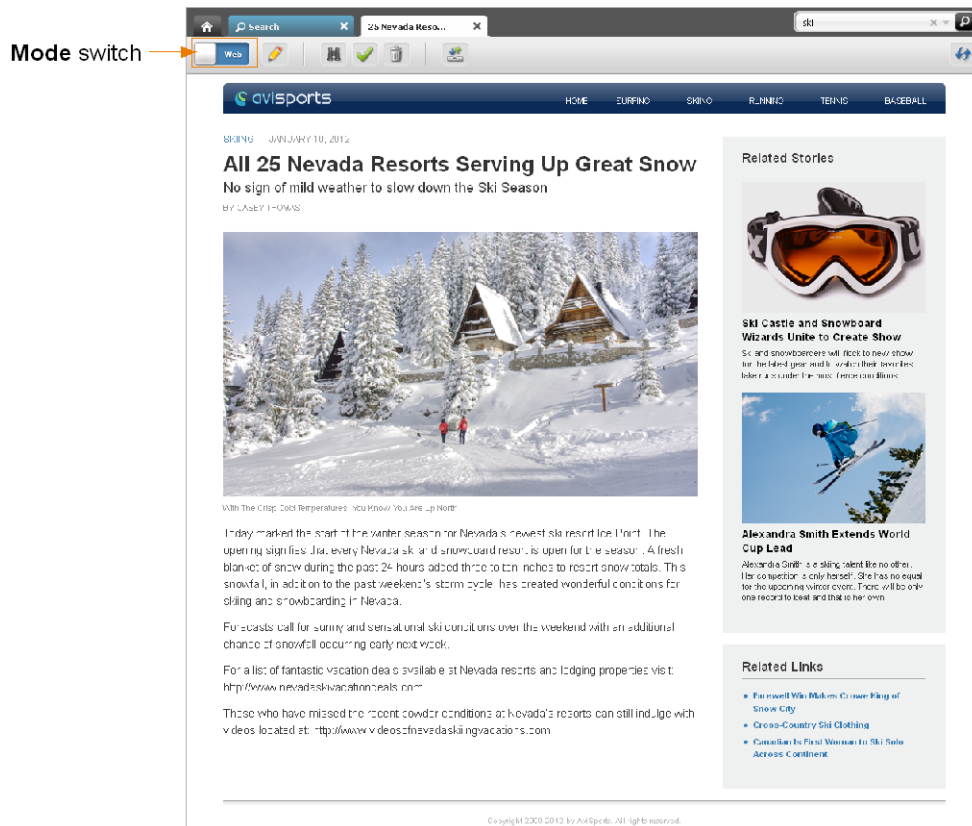
The tab re-displays the asset in Form Mode.

2.3.4 Edit an Asset in Form Mode

When an asset opens in Form Mode, you will see its content entry form displayed in a tab. You can make changes to the asset by modifying the information displayed in the fields of the form.

1. If the asset is not already open, find and open the desired asset in its Inspect view. For instructions, see Section 2.3.2, "Find and Open an Asset".

2. If the asset opened in Web Mode, switch to Form Mode. For instructions, see Section 2.3.3, "Switch Between Form Mode and Web Mode".

3. Edit the asset in Form Mode. For example, if you found some errors in the content and want to correct them, you would do the following:

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

    The tab displays the asset in its editable form.

Figure 2–14   Edit View of an Asset in Form Mode

Both the asset type and the name of the asset are displayed directly below the asset's form section selector.

b. Make changes to the content of the **Name** and **Headline** fields.

Note that fields whose names have an asterisk next to them are required, which means you cannot leave them blank. If you leave a required field blank, WebCenter Sites will not let you save the asset.

> **Note:** Depending on how your site is set up, one or more of the asset's fields may be WYSIWYG-enabled. A WYSIWYG-enabled field allows you to apply MS Word-style formatting to your content right in the asset's Edit view. For more information, see Section 3.5.1, "Working with the CKEditor."

1. Click within the **Body** field to load CKEditor.

Figure 2–15 CKEditor Displayed in an Asset's Form
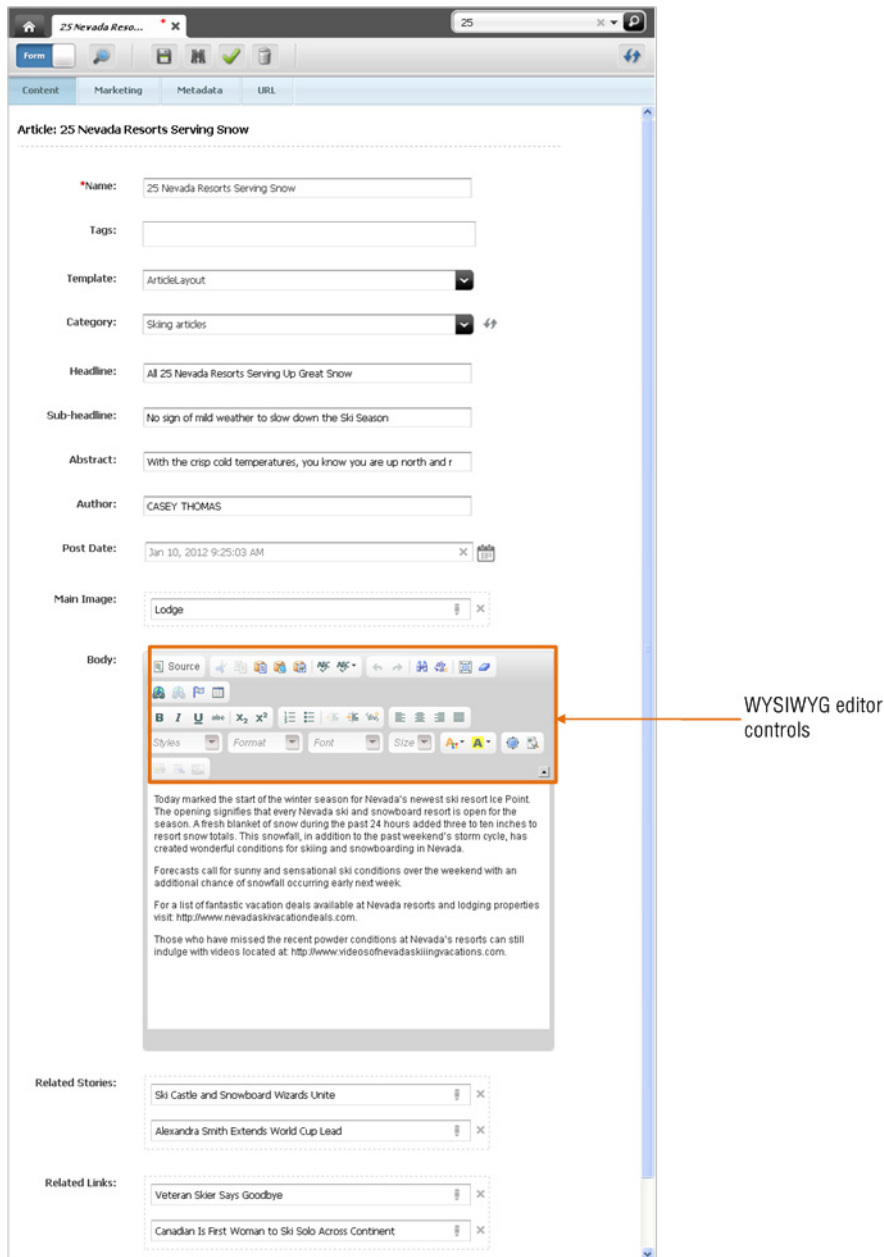
When CKEditor appears, make changes to the displayed text. If you are familiar with Microsoft Word, explore the features available in CKEditor – its functionality mimics that of Word.

2. Once you have finished making your changes, save the asset. In the asset's toolbar, click the **Save** icon

When you click the **Save** icon, WebCenter Sites saves the changes you have made to the asset so far, but keeps the Edit view of the asset open. (You can also select the **Content** menu and then select **Save** for the same result.)

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

The tab re-displays the asset's Inspect view in Form Mode, showing the changes you have made to the asset.

2.3.5 Edit an Asset in Web Mode

Web Mode offers in-context editing, which means you can create and edit an asset in the context of the website. Web Mode displays an asset as it would be displayed on the website if it were published. To edit the content of an asset in Web Mode, do the following:

1. If the asset is not already open, find and open the desired asset. For instructions, see Section 2.3.2, "Find and Open an Asset".

2. If the asset is displayed in Form Mode, switch to Web Mode. For instructions, see Section 2.3.3, "Switch Between Form Mode and Web Mode."

   The tab displays the asset's Inspect view in Web Mode:

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

   The tab displays the asset's Edit view in Web Mode.

Figure 2–16   Edit View of an Asset Displayed in Web Mode
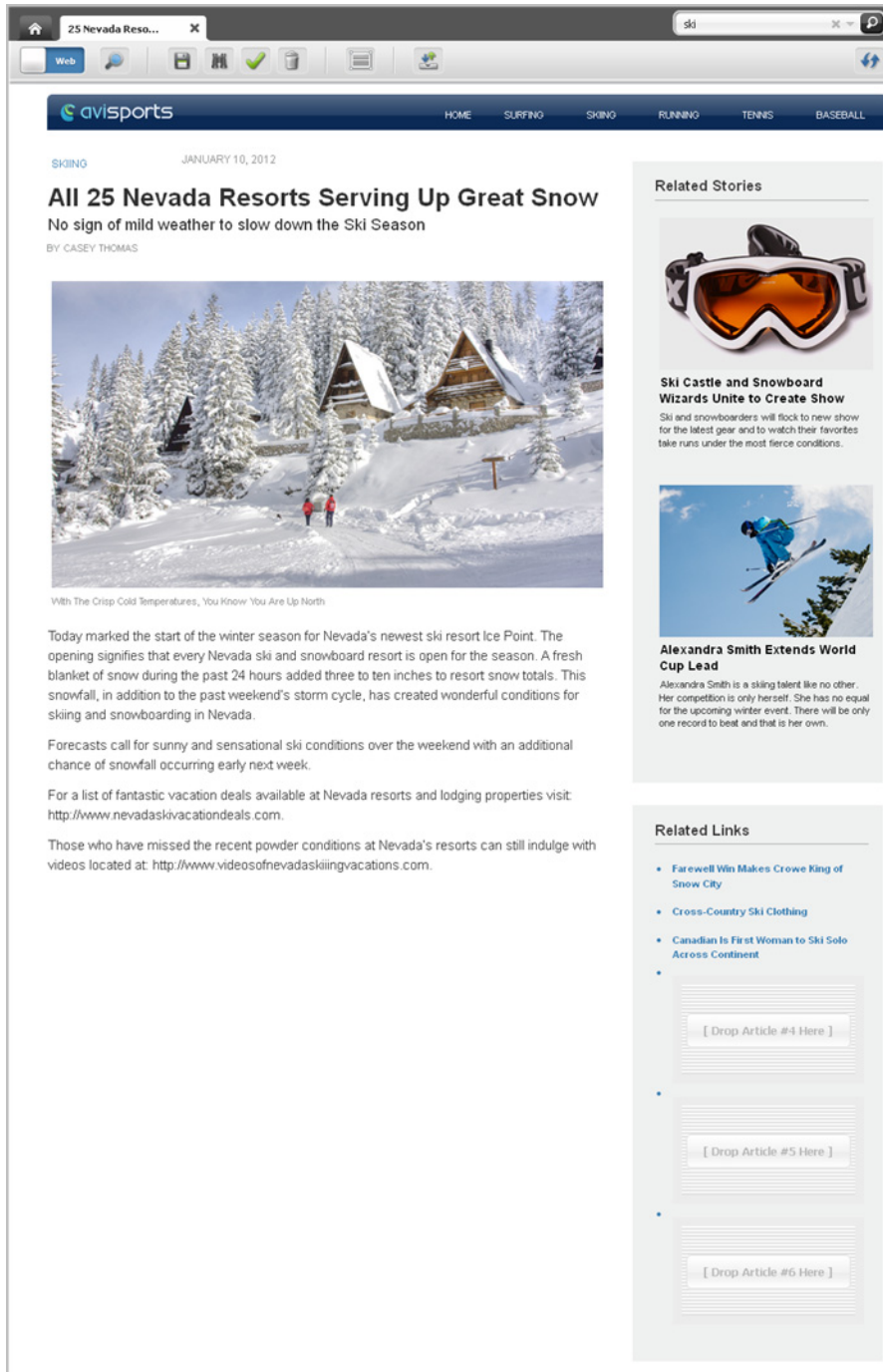
4. Point to the different areas of the asset to determine which areas are editable. Editable areas will be highlighted when you point to them.

5. Click in the highlighted areas to determine the type of content each area supports.

   – When you click in a slot, a toolbar is displayed with the actions you can perform on the asset contained within the slot, as shown in Figure 2–17.

Figure 2–17   Slot Toolbar

Slot toolbar
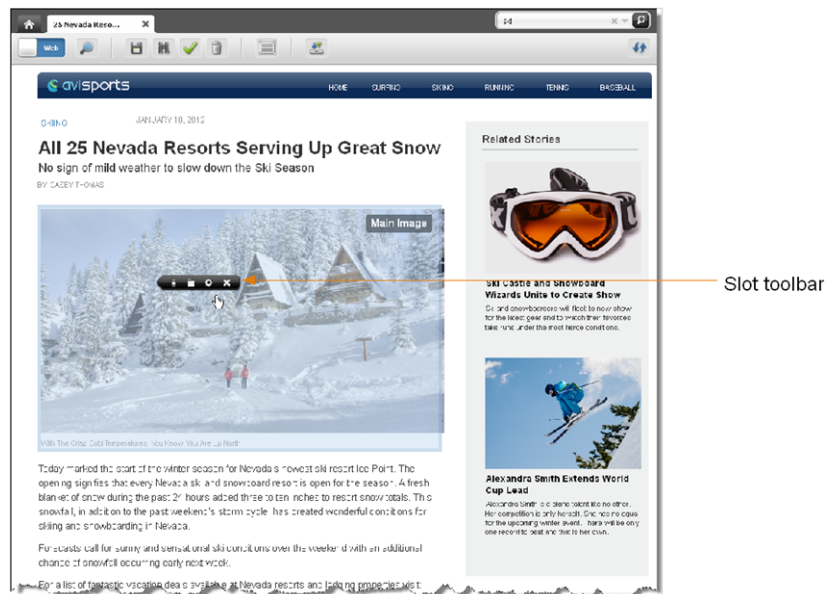
You can replace the content of the slot with another asset by dragging and dropping an asset from the **Content Tree**, **My Work** tree, or a search results list into the desired slot. You can also edit the content of the asset currently contained within the slot or change how the asset will be displayed on the website by changing the layout of the slot containing the asset.

– When you click in a text area, you will either see a simple text field or a WYSIWYG-enabled text field, as shown in Figure 2–18:

Figure 2–18   CKEditor Displayed in Web Mode
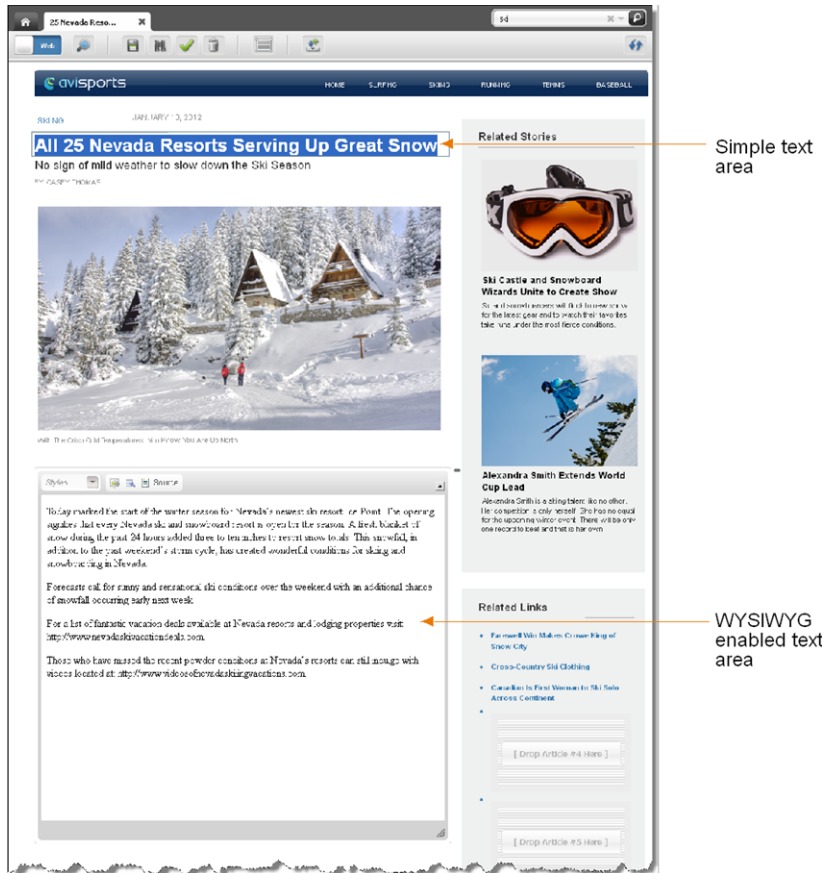
For more information about working with slots and text areas, see step 7 on page 4-9.

6. If you are finished with your changes, click the **Save** icon to save your changes.

2.3.6 Preview an Asset

Previewing assets enables you to see how the asset will look when published to the website. Unlike working with an asset in Web Mode, when you preview an asset, you cannot make any changes to the asset's content. You do, however, have the choice to view the asset with a different layout (template) or wrapper.

1. If the asset is not already open, find and open the desired asset. For instructions, see Section 2.3.2, "Find and Open an Asset".

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

3. If the asset does not have a template assigned to it, the "Select Preview Template" dialog box opens. Select the template you wish to use to preview the asset and then click **Apply**.

    The tab displays the preview of the asset (which is how the asset will appear on the website once it is published).

Figure 2–19   Preview of an Asset

a. In the preview of the asset, review the content you have edited. Note any changes to the asset you still want to make.

b. If you would like to make additional changes to the asset, do the following:

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

        The tab re-displays the asset's Inspect view (in either Form Mode or Web Mode).

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

    c. Make the desired changes and then save the asset.

2.3.7 Additional Ways of Accessing Assets

In addition to performing a search, you can also access assets using the **Site Tree**, **Content Tree**, and **My Work** tree, which are located in the navigation pane.

1. In the navigation pane, click one of the following bars:

Figure 2–20   Navigation Pane
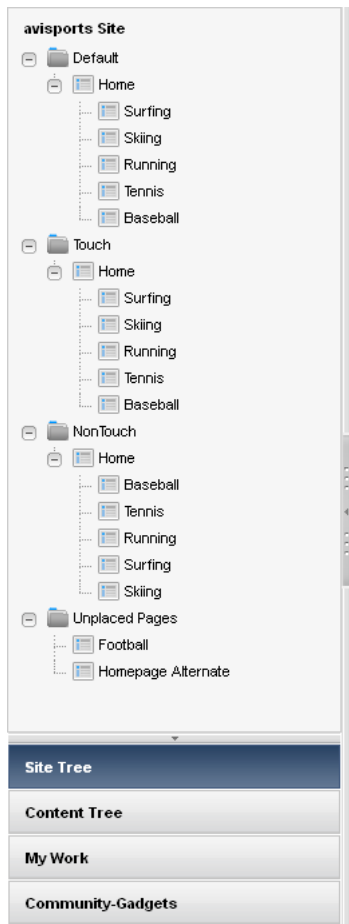
- **Site Tree** – Allows you to browse pages of your website. These pages can either be placed in a hierarchy under a site plan or "unplaced" (meaning the pages are not part of any site plan). A site plan represents the navigation (organization) of a website. Within a single CM site, there can be multiple site plans, and each site plan is displayed in the CM site's **Site Tree**.

  For example, there are three websites using the content from the avisports sample site: "Default," "Touch," and "NonTouch." Therefore, there are three site plans in the avisports **Site Tree**. When a visitor accesses the "Default" website for the avisports sample site, the pages will be displayed in the order the "Default" site plan shows in the **Site Tree**. Similarly, when a visitor accesses the "Touch" website for the avisports sample site, the pages will be displayed in the order the "Touch" site plan shows in the **Site Tree**.

- **Content Tree** – Allows you to visually browse the flex asset hierarchies present in your site.

- **My Work** – Contains the **Bookmarks** and **History** nodes.

- **Community-Gadgets** – If Oracle WebCenter Sites: Community-Gadgets is integrated with the WebCenter Sites Contributor interface, the **Community-Gadgets** tree will be accessible from the navigation pane. This tree contains all the deployable widgets and gadgets for the current site. For more information about the **Community-Gadgets** tree, see Chapter 12, "Working with Widgets and Gadgets in the Contributor Interface."

For detailed information about the trees, see the section Section 21.2, "Navigation Pane." For information about using the nodes in the **My Work** tree, see Section 6.6, "Organizing Assets."

The navigation pane displays the appropriate tree.

2. Browse the assets in the tree. Right-click an asset to open a context menu containing content management options you can perform on that asset. Do the following:

   a. **Drill down the hierarchy.** Click the plus sign next to a node to expand the node and display its associated assets. If you are working with the **Content Tree**, double-click the desired parent asset to open a "Browse" tab containing a list of its children.

   b. **Right-click the desired asset.** WebCenter Sites opens a context menu with content management functions you can perform on the asset. Figure 2–21 shows the context menu for the "Surfing" page asset in the **Site Tree**:

Figure 2–21   Context Menu for a Page Asset in the Site Tree
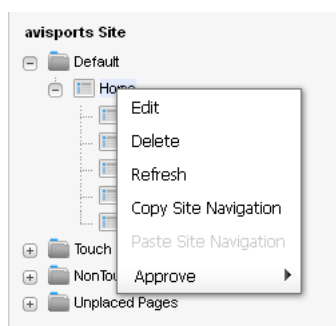
Assets in the **Content Tree** or **My Work** tree may have different content management options in their context menus, depending on the type of asset you select in the tree and your assigned permissions in the site.

2.3.8 Switch to a Different Site

When working in WebCenter Sites, you can switch between the sites you have permissions to work in, without having to log out and back in to WebCenter Sites.

To switch to another site

1. If the applications bar is not already open, open it by clicking the **down-arrow** icon, located at the extreme right of the menu bar.

Figure 2–22   Menu Bar

2. In the Site drop-down list, select the site you wish to switch to.

Figure 2–23   Site Drop-Down List

> **Note:** The Site drop-down list contains only sites for which you have the appropriate permissions.

WebCenter Sites logs you in to the site you selected.

2.3.9 Log out of WebCenter Sites

Log out of WebCenter Sites to end your session. Do the following:

1. If the applications bar is not already open, open it by clicking the **down-arrow** icon, located at the extreme right of the menu bar.

   The applications bar is displayed above the menu bar.

2. In the applications bar, click **Logout**.

2.3.10 Congratulations!

You are now familiar with asset management tasks that you may be performing every time you work in the Contributor interface. Log back in and continue to work in the Contributor interface. The rest of this guide gives you more information about the exercises you completed in this section. A summary of the Contributor interface and its features is available in Chapter 21, "Navigational Reference."

3

Creating, Sharing, and Editing Assets in Form Mode

This chapter describes the basic procedures for creating and editing assets in Form Mode, illustrated with examples from the avisports sample site.

This chapter contains the following sections:

3.1 Creating Assets in Form Mode

Creating assets is permission based. If you have the right permissions, you can create brand new assets "from scratch." If the asset that you want to create is similar to an existing asset, you can copy the existing asset and make changes to the copy, which saves you a few steps. If an asset currently exists on one site and you need to create the same asset for a different site, you can share the asset so that you do not have to create it more than once. All of these methods are described later in this chapter.

If the administrator configured an asset type such that all assets of that type open in Form Mode, when you create an asset of that type, a content entry form containing predefined fields into which you can enter information for the asset being created is displayed.

> **Note:** The Contributor interface provides two modes for creating new assets – Form Mode and Web Mode. This section only provides information about creating assets in Form Mode. For information about creating assets in Web Mode, see Section 4.2, "Creating Assets in Web Mode."

3.1.1 How Many Ways Can You Create an Asset?

- Create assets from scratch
- Copy existing assets and then work with the copied asset

The assets you can create are determined by how the administrator has personalized the "New" menu (from the **Content** menu, select **New**) for your role. The purpose of

personalizing the contents of the "New" menu is to make your job easier. For example, you will see only the asset types for which you can create assets.

3.1.2 Creating a New Asset in Form Mode

If the administrator configured an asset type to be created in Form Mode and listed in your "New" menu (from the **Content** menu, select **New**), you can create assets of that type by entering information into the fields of a content entry form.

To create assets in Form Mode

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Select the type of asset you want to create. In the menu bar, select **Content**, then select **New**, and then *select the type of asset you wish to create*. (In this example, we use the "Article" asset type).

Note: In the avisports sample site, assets of type "Article" are configured to open in Web Mode. Therefore, when you select to create an "Article" asset, the "Create Article" dialog box is displayed.

To follow this procedure (and create an "Article" asset in Form Mode):

1. In the "Create Article" dialog box, fill in the following fields:

   In the "Select Layout" field, select the layout you wish to assign to the asset.

   In the "Name" field, enter a name for the asset. For information about naming the asset, see step 4a.

2. Click **Continue**.

   The asset's Create view is displayed in Web Mode.

3. Switch to Form Mode. In the asset's toolbar, click the **Mode** switch.

   The asset's Create view is displayed in Form Mode.

4. Continue to step 4b.

---

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:

Figure 3–1   '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. For more information, see Chapter 16, "Workflow."

The tab displays the asset's Create view as a content entry form ("Article" asset in this example).

Figure 3–2   New 'Article' Asset Displayed in Form Mode

4. In the asset's Create view, do the following:

    a. In the "Name" field, enter a name for the asset. Note the following conventions when naming the asset:

        – The name must be between 1 and 64 alphanumeric characters.

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

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

    b. 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 via a WYSIWYG editor, such as CKEditor (as shown in Figure 3–3). These text fields allow you to enter and format your content using controls similar to those of Microsoft Word.

Figure 3–3 CKEditor Field
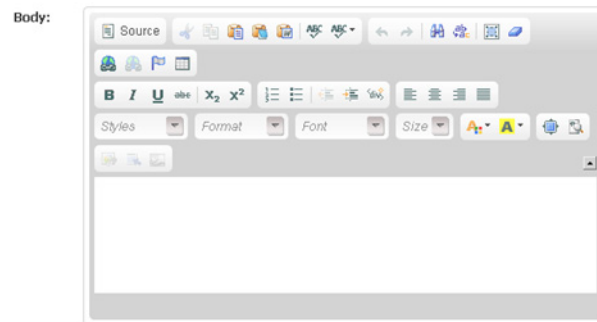
To work in a CKEditor-enabled field, you must initiate CKEditor for that field by clicking in the field. When you click in the field, the CKEditor toolbar opens. For more information, see Section 3.5.1, "Working with the CKEditor."

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

Figure 3–4 'PostDate' Field

Clicking the **Pick a date** icon invokes the Date Picker attribute editor. For more information, see Section 3.5.1, "Working with the CKEditor."

- **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 will see a **Browse** button under a Drop Zone, as shown in Figure 3–5:

Figure 3–5 Image Picker Field

Clicking the **Browse** button invokes the Image Picker, to the right of the tab displaying the asset, showing either names or thumbnails of the image assets from which you can select. For more information, see Section 3.5.2, "Working with the Image Picker."

– **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 (as shown in Figure 3–6).

Figure 3–6   Clarkii Online Image Editor Field
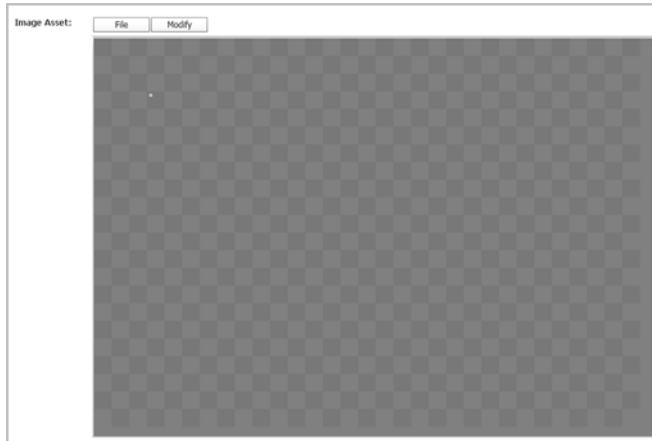
For detailed instructions, see Section 3.5.3, "Working with the Clarkii Online Image Editor."

– **Type Ahead fields.** You may see one or more fields that display the text "Type Ahead" within a drop-down menu, as shown in Figure 3–7:

Figure 3–7   Type Ahead Field
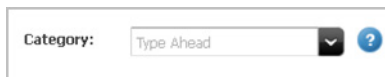
To populate this field with an asset, you can either start typing the name of the asset you wish to place into the field or use the drop-down menu to select the desired asset. Your developers determine the type of asset(s) this field supports.

– **Upload fields.** You may see one or more fields that enable you to upload an image file from your local machine, as shown in Figure 3–8:

Figure 3–8   Upload Field

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

– **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 a tree or search results list, to associate with the asset you are creating. To populate an association field, do the following:

In the **Content Tree**, **My Work** tree, or a search results list, click the name of an asset and hold down the button on the mouse while you drag the asset to the association field.

Figure 3–9 Asset Dragged Over an Association Field
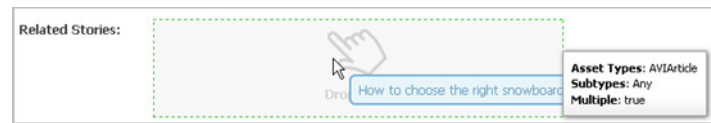
When you hover an asset of an accepted type over the field, a green border is displayed around the field.

Release the button on the mouse to drop the asset into the field.

The populated association field will look similar to the following:

Figure 3–10 Populated Association Field
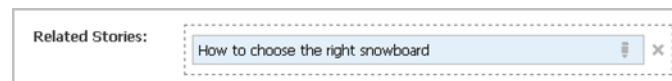
WebCenter Sites links the asset you dropped into the association field to the asset you are working with. The name of the associated asset is displayed in the association field. More information on associating assets can be found in Chapter 8, "Associating Assets."

c. (Optional) In the **Tags** field, enter a single word or short phrase to attach to the asset. You can either enter a new tag into this field or apply a pre-existing tag.

Note the following conventions when adding tags to an asset:

* A tag must be between 1 and 32 alphanumeric characters. The only other characters allowed in the **Tags** field are: underscore (_) and hyphen (-).

* To end a tag, use the semicolon (;) or press **Enter** on your keyboard. For example, if you want to enter multiple tags into the same **Tags** field, each tag must be separated by a semicolon (;).

Tags can be added to basic assets, flex assets, and page assets. When an asset is tagged, you can conduct an advanced search to find the tagged asset and all other assets that have been tagged with the same content. For example, a marketer who is creating a new recommendation can select the content of the recommendation based on a query of the desired tag.

Note: For more information about:

■ tagging assets, see Section 6.6.2, "Working with Tags."

■ using tags to search for assets, see Section 6.3, "Performing an Advanced Search."

■ recommendation assets, see Chapter 19, "Creating and Configuring Recommendations with Engage."

---

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

e. 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). For more information, see Chapter 11, "Working with Multilingual Assets."

    f. If you wish to create a vanity URL for the asset, select the **URL** section of the form. In the "URL" field, specify the desired vanity URL for the asset. For instructions, see Section 3.4.1, "Creating Vanity URLs for Assets."

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 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 asset's Inspect view in Form Mode. You cannot modify the asset's content when the asset is displayed in the Inspect view.

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 as described in Section 16.4, "Using Workflow Functions."

8. Preview the asset:

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

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Section 7.2, "How Do I Preview Assets?"

c. If you wish to make additional changes to the asset, do the following:

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

    The tab displays the Inspect view of the asset.

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

    The tab displays the Edit view of the asset. For information about editing assets in Form Mode, see Section 3.3, "Editing Assets in Form Mode."

9. 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.

3.1.3 Creating Assets by Copying Existing Assets

You can create new assets by copying existing assets. You can then work on the copies, making changes to the content where necessary. You can copy assets even if they are checked out by another user. Assets can be copied using either Form Mode or Web Mode.

3.1.3.1 Create an Asset by Copying an Existing Asset

This section provides instructions for creating a new asset by copying an existing asset.

To create a new asset by copying an existing asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you wish to copy. Do one of the following:

   – Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

      b. In the list of search results, navigate to and click the name of the desired asset.

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

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

3. Copy the desired asset. In the menu bar, expand the **Edit** menu and then select **Copy**.

   Note: If you do not see a **Copy** option, stop here. You do not have the appropriate permissions to copy the asset. If you have questions about your permissions, contact your administrator.

   A tab opens displaying the copied asset's Edit view in either Form Mode or Web Mode. The copied asset's name is displayed in the tab as "Copy of *Asset Name_ randomly generated number*."

4. If the copy of the asset opens in Web Mode, do one of the following:

   – If you wish to work with the copied asset in Web Mode, see Section 4.4, "Editing Assets in Web Mode."

   – If you wish to work with the copied asset in Form Mode, switch to Form Mode.

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

      b. When the tab displays the asset in Form Mode, continue to the next step.

5. In the Edit view of the copied asset, replace the content in the fields with content for the new asset you are creating. Do the following:

   a. In the **Name** field, replace the asset's system generated name with a name that uniquely identifies the copied asset. Note the following conventions when naming the asset:

- – The name must be between 1 and 64 alphanumeric characters.

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

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

    b. (Optional) Set or change the new asset's locale designation:

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

        b. In the "Metadata" section, navigate to the "Locale" drop-down list and select the desired locale designation for the asset.

    If you do not make a selection, one of the following happens:

- – If the source asset has a locale designation, the new asset will retain the locale designation of the source asset.

- – If the source asset has no locale designation, the new asset will not have a locale designation until you manually assign one.

    For more information, see Chapter 11, "Working with Multilingual Assets."

    c. Populate the remaining fields with the desired content for the new asset. For information about the different fields you may see when working with an asset in Form Mode, see step b.

6. 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 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 asset's Inspect view in Form Mode. You cannot edit the asset's content when the asset is displayed in the Inspect view.

8. (Optional) 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 as described in the section Section 16.4.1, "Assigning an Asset to a Workflow."

9. Preview the asset:

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

    b. If the asset does not have a template assigned to it, the "Select preview template" dialog box opens. Select the desired layout and click **Apply**.

    The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

3.1.3.2 Copying Multiple Assets at the Same Time

This section provides instructions for creating multiple assets by copying more than one existing asset at the same time.

To copy multiple assets at the same time

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the assets you wish to copy:

    ■ If you wish to search for the desired assets, in the **Search** field, enter search criteria identifying the assets you wish to copy and then click the **magnifying glass** icon.

    A "Search" tab opens displaying the results of your search.

    ■ If you wish to access a list of assets via the **Content Tree**, do the following:

        a. In the navigation pane, click the **Content Tree** bar.

        b. In the **Content Tree**, double-click the parent node containing the assets you wish to copy.

    A "Browse" tab opens displaying a list of assets associated with the parent you double-clicked.

3. In the list of assets, **Ctrl+click** or **Shift+click** the assets you wish to copy.

4. Right-click the highlighted assets and select **Copy** from the context menu.

    The following dialog box opens:

Figure 3–11   Copy Successful Message
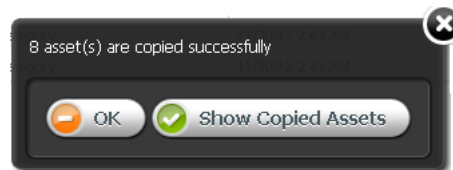
5. In the dialog box, do one of the following:

    ■ To close the dialog box and work with the copied assets at another time, click **OK**.

    ■ To view a list of the copied assets, click **Show Copied Assets**.

    A "Browse" tab opens listing the names of the assets you copied.

    > **Note:**   The naming convention for copied assets is: "Copy of *Asset Name_randomly generated number*."

6. Open the copied assets and replace the content in the fields with content for the new assets you are creating. For instructions, see steps 5 – 9 in Section 3.1.3.1, "Create an Asset by Copying an Existing Asset." Repeat these steps until all copied assets have been renamed and their content has been replaced with content for the new assets.

3.2 Sharing Assets with Other Sites

If you are working with an asset that you want to use in more than one site, you can share it so that you do not have to create it more than once and maintain it across multiple sites.

> **Note:** To share an asset with another site, make sure that the asset's type is enabled on the site with which you wish to share it.

3.2.1 Which Assets Can You Share?

Before you share an asset, keep in mind the following:

- You must have the permissions to share an asset.

- You can share an asset only to sites that you have access to. If you have access to only one site, the **Share** option in the **Content** menu is not available to you.

- You cannot share "Page" assets.

- Share an asset only if the content it contains does not have to be unique to the target site. For example, you can share an asset containing your company's logo, because the same image can probably be used on all of the company's sites.

  If the nature of the content requires a separate, unique version for each site, do not share the asset – instead, create a new asset for each site that requires a unique version of the content.

- Because of the nature of asset sharing, if a shared asset is deleted, it is automatically removed from all of the sites it was shared to.

- If the asset is in a workflow, you and others can change its workflow status only when you are working in the asset's native site.

- It is good practice to share the asset only when you are ready to publish it; that is, wait to share the asset until it has been approved.

- If you want to share a localized asset to another site, the asset's locale must be enabled on the target site.

- If you share an asset that has dependencies, (for example, the shared asset is associated with an "Article" asset), you will have to share all of the asset's dependent assets to the target site in order for the primary shared asset to be successfully approved for publishing on the site to which you shared it.

If you wish to share an asset with another site, but you do not have the appropriate permissions, contact your WebCenter Sites administrator.

3.2.2 How Do You Share Assets with Other Sites?

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to share to another site. Do one of the following:

   - Search for and open the desired asset:

     a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

     b. In the list of search results, navigate to and click the name of the asset you wish to share.

> **Note:**   If you wish to share the asset without first inspecting it, in the
> search results list, right-click the desired asset and select **Share** from
> the context menu. Continue to step 4.

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

   a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is
      collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

   b. In the list of bookmarked assets, double-click the name of the desired
      asset.

   For more information on finding assets, see Chapter 6, "Finding and Organizing
   Assets."

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

3. In the menu bar, select **Content**, then select **Share**.

   The "Share Selected Content" dialog box opens.

Figure 3–12   'Share Selected Content' Dialog Box
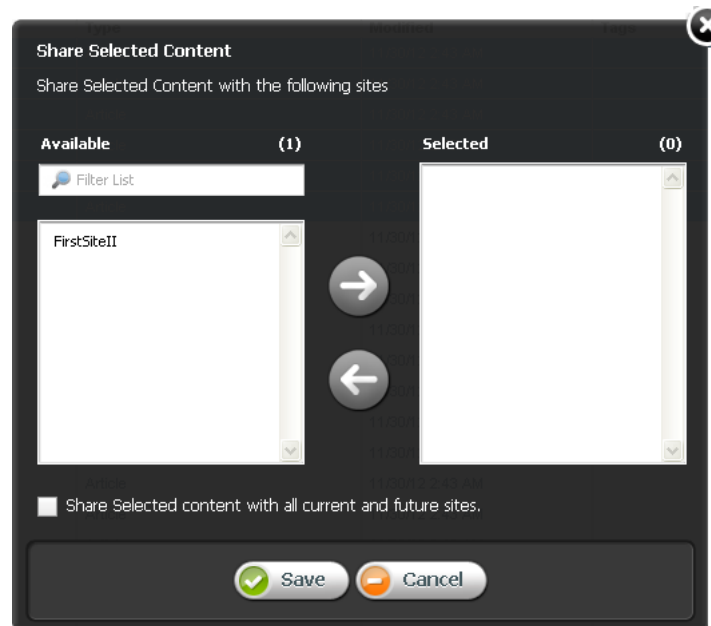
4. In the "Share Selected Content" dialog box, do the following:

   a. In the "Available" list box, select the site(s) to which you wish to share the asset
      and move the site(s) to the "Selected" list box.

   b. If you wish to share this asset with all current and future sites, select the **Share
      Selected content with all current and future sites** checkbox.

   c. Click **Save**.

   The asset is now accessible on the site(s) to which you shared it.

3.2.3 How Do You Share Multiple Assets with Other Sites?

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the assets you wish to share:

   ■ If you wish to search for the desired assets, in the **Search** field, enter search criteria identifying the assets you wish to share and then click the **magnifying glass** icon.

   A "Search" tab opens displaying the results of your search.

   ■ If you wish to access a list of assets via the **Content Tree**, do the following:

   a. In the navigation pane, click the **Content Tree** bar.

   b. In the **Content Tree**, double-click the parent node containing the assets you wish to share.

   A "Browse" tab opens displaying a list of assets associated with the parent you double-clicked.

3. In the list of assets, **Ctrl+click** or **Shift+click** the assets you wish to share.

4. Right-click the highlighted assets and select **Share** from the context menu.

   The "Share Selected Content" dialog box opens:

   Figure 3–13 'Share Selected Content' Dialog Box
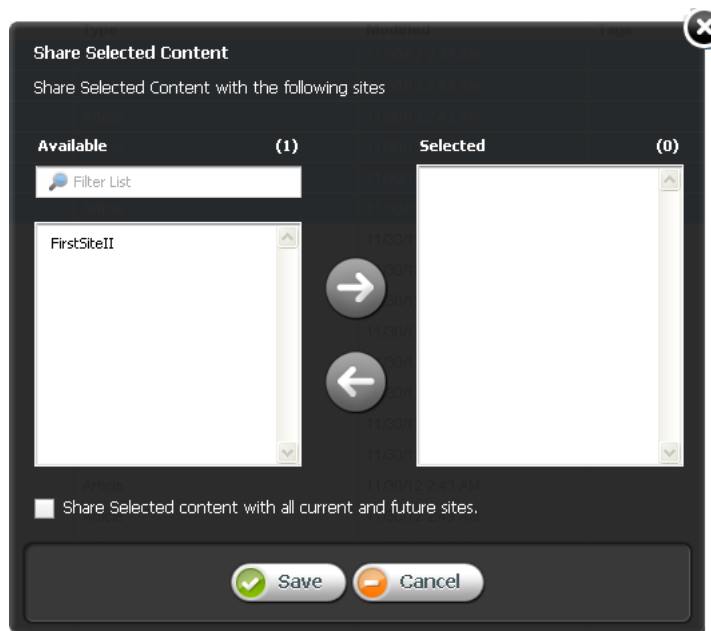
5. In the "Share Selected Content" dialog box, do the following:

   a. In the "Available" list box, select the site(s) to which you wish to share the assets and move the site(s) to the "Selected" list box.

   b. If you wish to share these assets with all current and future sites, select the **Share Selected content with all current and future sites** checkbox.

   c. Click **Save**.

   The assets are now accessible on the site(s) to which you shared them.

3.3 Editing Assets in Form Mode

Editing assets is permission based. Your site administrator determines which users can work with which assets. If you have the right permissions, you can edit assets in the WebCenter Sites Contributor interface. For more information about the permissions needed to edit assets, see your administrator.

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

> **Note:** If you need to edit a shared asset, you will have to edit the asset in its native site (the site on which the asset was originally created).

To edit an asset in Form Mode

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   – Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

      b. In the list of search results, navigate to and click the name of the desired asset.

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

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

   > **Note:** If you wish to edit the asset without first inspecting it, in the list of assets, right-click the desired asset and select **Edit** from the context menu. Continue to step 4. If the asset's Edit view is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

   For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

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

   a. If the asset is displayed in Web Mode, switch to Form Mode. In the asset's toolbar, click the **Mode** switch.

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

   The tab displays the Edit view of the asset in Form Mode.

Figure 3–14   Edit View of an Asset in Form Mode

4. Make the desired changes to the asset's content. See step 4 for details on filling in the fields you may see when working with an asset in Form Mode.

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 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 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 Form Mode. You cannot edit the asset's content when the asset is displayed in the Inspect view.

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 as described in Section 16.4.1, "Assigning an Asset to a Workflow."

8. Preview the asset:

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

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

3.4 Working with Vanity URLs

Vanity URLs are short, readable, easy to control URLs that usually contain either the name of, or other descriptive content about the web page to which it points. WebCenter Sites supports two types of Vanity URLs – Asset URLs and Blob (File) URLs.

You, as a content contributors can create vanity Asset URLs for any type of asset. An Asset URL can be either auto-generated (based on a pattern defined by the administrator in the WebCenter Sites Admin interface) or created in the WebCenter Sites Contributor interface. A Blob (File) URL is created by your administrator in the WebCenter Site Admin interface for an asset's associated file (for example, a Blob URL is created for an Image asset's associated Image file). In the Contributor interface, you can view a Blob (File) URL from an asset's content entry form.

When a vanity URL is defined for an asset (or its associated file), and that asset is published to the website, the vanity URL points to the web page that renders the content of the asset. This section contains instructions for creating and managing Asset URLs. For information about creating and managing Blob (File URLs), see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

This section contains the following information:

■   Section 3.4.1, "Creating Vanity URLs for Assets"

■   Section 3.4.2, "Viewing and Managing Vanity URLs"

3.4.1 Creating Vanity URLs for Assets

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

To create a vanity URL for an asset

1. Log in to WebCenter Sites, select the site you want to work with, and select the icon for the WebCenter Sites **Contributor** interface.

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

–   Search for and open the asset for which you wish to create a vanity URL.

a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

    b. In the list of search results, navigate to and click the name of the desired asset.

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

    a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

    b. In the list of bookmarked assets, double-click the name of the desired asset.

For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

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

   a. If the asset is displayed in Web Mode, switch to Form Mode. In the asset's toolbar, click the **Mode** switch.

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

   The tab displays the Edit view of the asset in Form Mode.

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

The URL section of the form is displayed:

Figure 3–15   'URL' Section of a Content Entry Form

5. Create a new vanity URL for the asset:

   a. Fill in the following fields:

    * **URL** – Enter the desired path for the vanity URL you are creating for the asset. For example, `skiing/article`.

> **Note:** The path for the vanity URL must be unique. WebCenter Sites does not allow different assets to share the same vanity URL path.

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

* **Device Group** – If your content management site is configured to support multiple device groups, select the device group for which this vanity URL will be used to render the asset on the website.

  For more information about device groups, see Chapter 13, "Creating Mobile Websites," and the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

* **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 the desired values for the arguments.

* **Wrapper** – This field is displayed only if your site has a wrapper. Select the wrapper for your site.

b. Click **Add**.

The vanity URL is displayed in a table, below the **Add** button.

Figure 3–16   'Vanity URL' Section 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. Publish the asset. For instructions, see the publishing chapter in the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

Once the asset is published to the website, the vanity URL that you defined for that asset renders it on the website.

3.4.2 Viewing and Managing Vanity URLs

This section provides instructions for viewing and managing vanity URLs.

> **Note:** If your administrator has configured an auto-generated Asset URL or created a Blob (File) URL for an asset's associated file, you only have permissions to view that vanity URL.

To view a vanity URL

1. Log in to WebCenter Sites, select the site you want to work with, and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose vanity URL(s) you wish to view:

- Search for and open the desired asset:

   a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

   b. In the list of search results, navigate to and click the name of the desired asset.

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

   a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

   b. In the list of bookmarked assets, double-click the name of the desired asset.

For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

3. In the asset's Inspect view, click the **URL** section of the form section selector.

The "URL" section of the asset's form opens.

- If the asset is not assigned any vanity URLs, the URL section of the form displays the message "No Asset URLs Found" (as shown in Figure 3–17).

Figure 3–17   URL Section of an Asset's Form – No Asset URLs Found
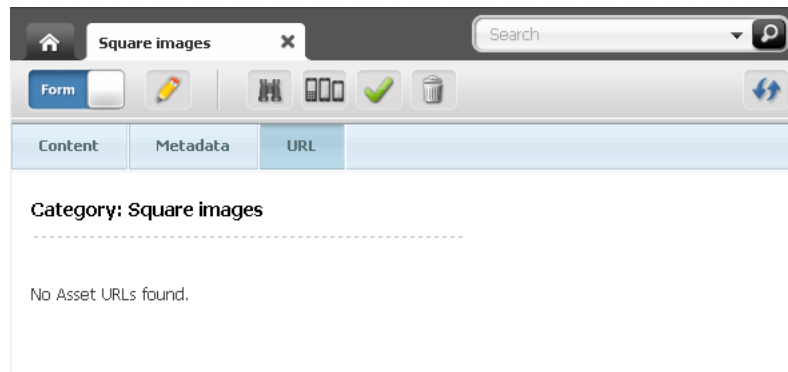
- – If a vanity URL has been created for the asset (auto-generated or custom), the URL section of the asset's form will look similar to Figure 3–18.

Figure 3–18   Vanity Asset URLs Displayed in the URL Section of an Asset's Form
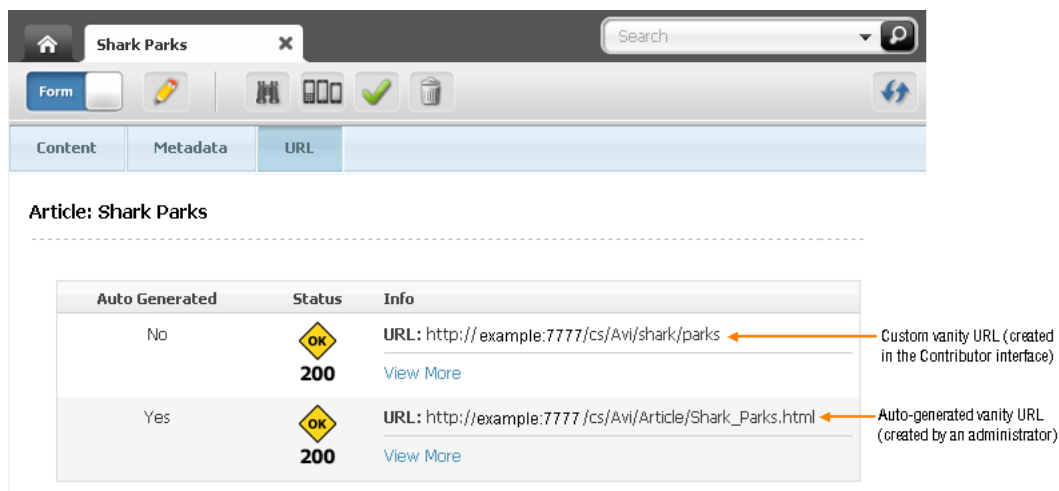
- – If a Blob (File) URL has been created for the asset's associated file, the URL section of the asset's form will look similar to Figure 3–19:

Figure 3–19   Blob (File) URL Displayed in the URL Section of an Asset's Form
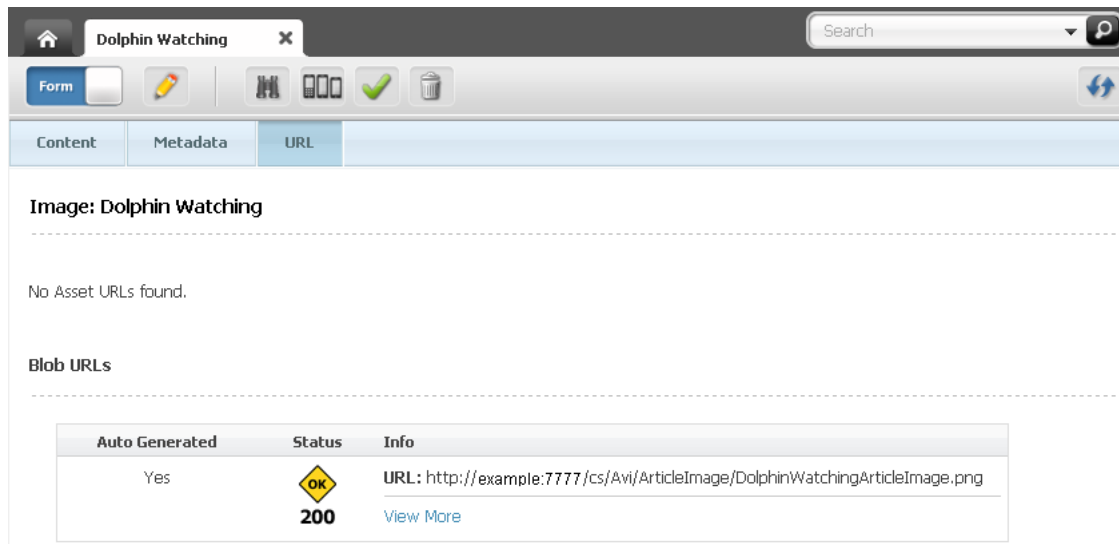
4. View the details of the URL (template, wrapper, device group, and so on) by clicking the **View More** link, located under the desired URL.

Figure 3–20   Vanity URL: View More link

Click the **View Less** link to collapse the details of the URL.

To manage an asset's vanity URL

1. Log in to WebCenter Sites, select the site you want to work with, and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose vanity URL you wish to edit or delete:

    –   Search for and open the desired asset:

        a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

        b. In the list of search results, navigate to and click the name of the desired asset.

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

        a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

        b. In the list of bookmarked assets, double-click the name of the desired asset.

For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

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

   a. If the asset is displayed in Web Mode, switch to Form Mode. In the asset's toolbar, click the **Mode** switch.

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

      The tab displays the Edit view of the asset in Form Mode.

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

   The URL section of the form is displayed.

5. Navigate to the desired URL and either change its status or delete it:

   – To edit the vanity URL defined for an asset, click the **Change Status** link (located in the "Action" column of the table) next to the URL you wish to edit.

Figure 3–21   Edit a Vanity URL

Fill in the following fields:

   a. In the **HTTP Status** drop-down menu, select one of the following HTTP statuses:

HTTP Status	Description
200	Standard response for a successful HTTP request. The visitor is directed to the requested web page to which the vanity URL points.
301	The web page has been moved permanently. This and all future requests will be directed to the URL defined in the **Redirect To** field.
302	Temporary redirect. The visitor is redirected to a temporary web page (for example, a web page containing content that will only be available for a month) defined in the **Redirect To** field.

b. In the **Redirect To** field, enter a URL that visitors will be redirected to when they attempt to access the asset from the vanity URL. If there is another vanity URL available for this asset, you can select to redirect the visitor to that URL.

c. Click **Apply**.

If you changed the HTTP Status of the URL, the change is reflected in the "Status" column of the table.

Figure 3–22   Redirected Vanity URL

– To delete a vanity URL defined for an asset, click the **Delete** link (located in the "Action" column of the table) next to the URL you wish to delete.

> **Note:** If you changed the status of a URL to 302 and redirected it to the URL you wish to delete, you cannot delete the URL until its association to the redirected URL is removed – that is, change the status of the redirected URL back to 200.

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**, the select **Save**.

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

– If you edited the vanity URL, the browser's address bar shows the edited vanity URL that is pointing to the preview of the asset.

– If you deleted the vanity URL, the browser's address bar shows the URL assigned to the asset by WebCenter Sites.

8. Publish the asset. For instructions, see the publishing chapter in the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

Once you publish the asset, the changes you made to the asset's URL are reflected on the website.

3.5 Working with Attribute Editors

This section contains information about the attribute editor enabled fields you may see when creating or editing an asset. This section contains the following:

- Section 3.5.1, "Working with the CKEditor"
- Section 3.5.2, "Working with the Image Picker"
- Section 3.5.3, "Working with the Clarkii Online Image Editor"
- Section 3.5.4, "Working with the Date Picker"

3.5.1 Working with the CKEditor

CKEditor is a popular third-party WYSIWYG editor that is used as the default editor for WYSIWYG-enabled text fields. CKEditor allows you to apply a wide range of MS Word-style formatting to your content.

Figure 3–23   CKEditor
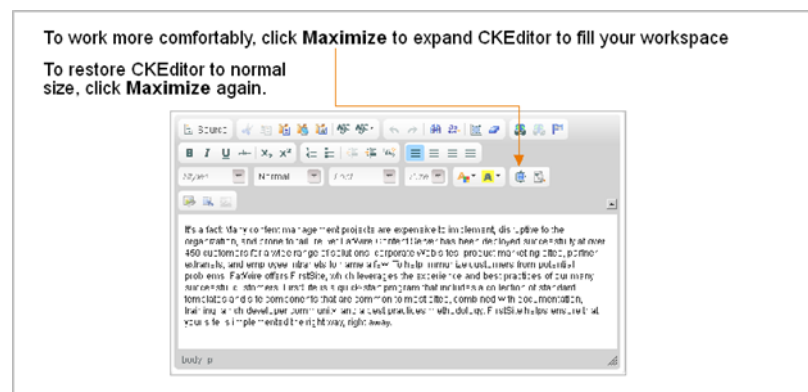
CKEditor also provides advanced features, such as access to your content's underlying HTML code, and the ability to accept pre-formatted content from MS Word documents.

Most features made available to you in the toolbar are native to CKEditor. To learn more about CKEditor and its capabilities, consult the editor's documentation, available at `http://docs.cksource.com`.

Several features on the CKEditor toolbar are specific to WebCenter Sites. The features are shown and explained below:

Figure 3–24 WebCenter Sites Specific Features in CKEditor
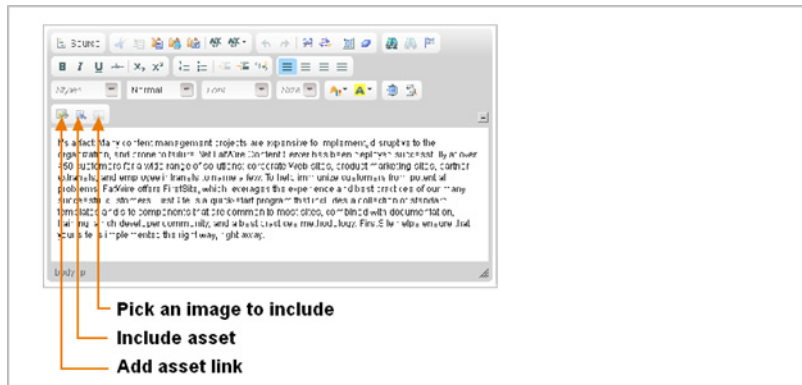
- **Add asset link** – Enables you to create a hypertext link from one asset to another asset. For more information, see Section 9.2, "Linking Two Assets Directly."

- **Include asset** – Enables you to render an asset's previewable content in another asset. For more information, see Section 9.3.1, "To Link Two Assets by Inclusion."

> **Note:** If the included asset is an image, then you can link the image to another asset. For more information, see Section 9.4, "Linking Two Assets via an Image Asset."

- **Pick an image to include** – Enables you to include an image from the "Image Picker," into the referring asset's CKEditor enabled field(s).

  Once the image is included in the field, you have the option to link the image to another asset. For more information, see Section 9.4.3, "Linking via an Image from the Image Picker."

3.5.2 Working with the Image Picker

When working with assets that can be associated with one or more image assets, you may see fields that support the Image Picker attribute editor. The Image Picker enables you to visually choose an image asset to associate with the asset you are creating or editing.

> **Note:** When configuring the asset type of the parent asset, your developers decide the following:
> - The fields for which Image Picker is enabled
> - The type of image assets displayed by Image Picker

To associate an image asset with another asset using the Image Picker

1. In the Create or Edit view of an asset displayed in Form Mode, navigate to the field associated with the Image Picker and click **Browse**.

Figure 3–25   Image Picker Field
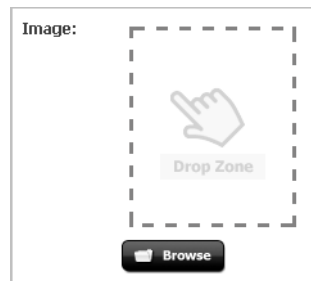
Image Picker opens in the search results list (to the right of the asset's form).

Figure 3–26   Search Results List Docked to the Right of an Asset
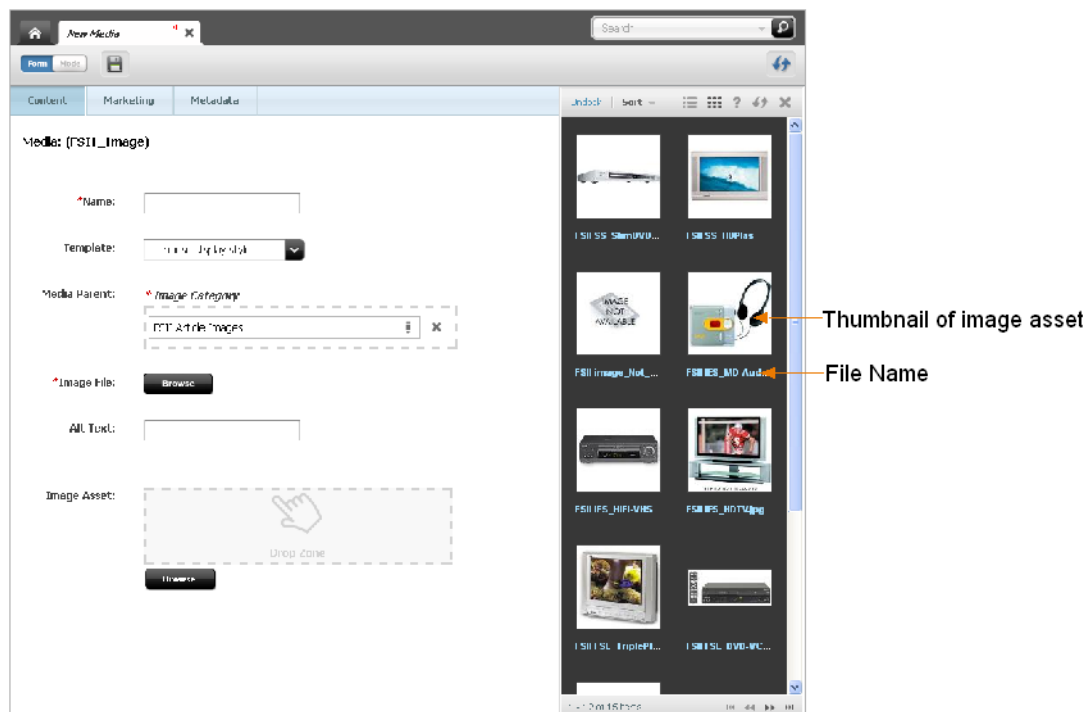
For each image asset, Image Picker shows either a thumbnail of the image as well as its file name or only the asset's file name (depending on the configurations made by your developers).

2. Navigate to the desired image asset and drag and drop the image into the field.

Figure 3–27   Populated Image Picker Field

The image asset you selected is associated with the asset you are working with. If the field was already populated with an image asset, the newly selected asset replaces the previous one. A thumbnail of the corresponding image appears in the field.

3. Click the **Save** icon to save your changes to the asset.

3.5.3 Working with the Clarkii Online Image Editor

The Clarkii Online Image Editor (Clarkii OIE) allows you to edit an image directly in an asset's New or Edit view in Form Mode. For example, you can use Clarkii OIE to crop and rotate an image. You can also use Clarkii OIE to enhance an image by adding graphics and/or text to it.

> **Note:** When working with Clarkii OIE, keep in mind the following:
>
> - Clarkii OIE is supported only in Form Mode.
>
> - Your site developers enable Clarkii OIE on a per-field basis when configuring asset types. For more information, see "Configuring the Clarkii Online Image Editor" in the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

Figure 3–28 shows an example view of the Clarkii OIE field rendered in an asset's Edit view in Form Mode.

Figure 3–28   Clarkii Online Image Editor Rendered in an Asset's Field
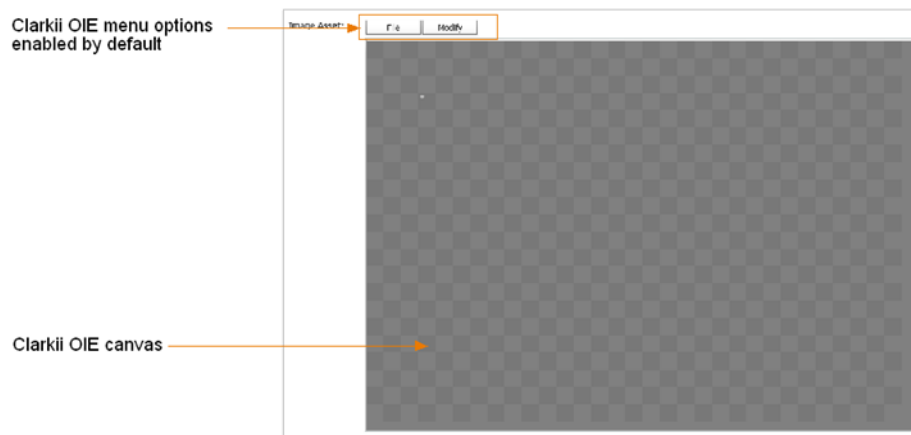
Clarkii OIE requires you to have Flash installed. If you do not have Flash installed, instead of Clarkii OIE you will see a link to download Flash. Click the link to download Flash. Once Flash is installed, Clarkii OIE loads in the appropriate field (as shown in the figure above).

When you work with an asset field using Clarkii OIE, you can do some or all of the following depending on how your developers configured Clarkii OIE:

- Select an image to place on the Clarkii OIE canvas, or select an image that will replace the image currently on the canvas. Your developers determine which images will be available to you.

- Use the toolbar and menu options available in the Clarkii OIE window to make other edits to the image on the canvas as necessary.

Your developers have the ability to customize the functions available to you in the Clarkii OIE toolbar and menu. These functions are strictly Clarkii OIE related and as such are not documented in this guide. For instructions about using the toolbar and menu options provided by Clarkii OIE, visit the following URL:

`http://www.online-image-editor-clarkii.com/`

To edit images with the Clarkii Online Image Editor

Note: Keep in mind the following:

- Before using this feature, make sure that you know which asset forms contain an attribute field associated with Clarkii OIE.

- The instructions in step 2 are guidelines that provide you with examples of what you can do when using Clarkii OIE. The functions you can perform in this step are determined by how your developers configured the Clarkii OIE properties.

If you have any questions, contact your developers.

---

1. Access Clarkii OIE in the desired asset's Create or Edit view.

   Clarkii OIE is displayed in the field and looks similar to the following:

Figure 3–29   Clarkii OIE-Enabled Field
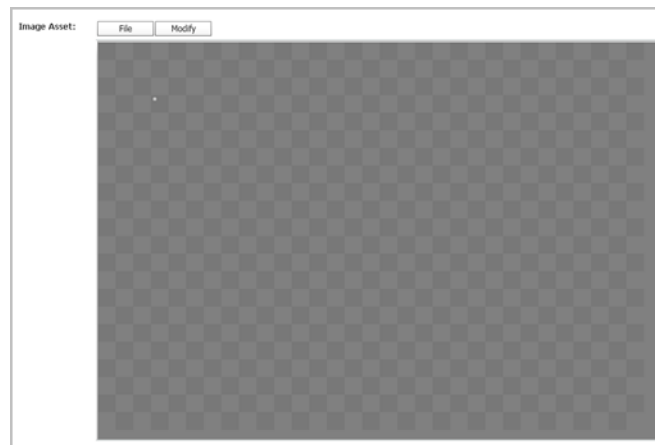
2. The following instructions are only for the menu options available by default in the Clarkii OIE feature out-of-the-box when WebCenter Sites is installed. For example, inserting images and making other modifications (such as resizing an image on the canvas) as necessary:

   – If you wish to insert an image on the Clarkii OIE canvas, replacing any images currently existing on the canvas, do the following:

      a. In the Clarkii OIE menu, select **File**, then select **Open**.

         The "Select file to open" dialog box opens.

      b. Select the image file you wish to insert on the Clarkii OIE canvas and click **Open**.

         The image is placed on the canvas, and replaces any images that are currently existing on the canvas.

    c. (Optional) If you wish to replace the image you chose with another one, select the desired image by repeating steps a and b.

– If you want to modify the image displayed on the Clarkii OIE canvas (such as resizing the image and so on), click the **Modify** option in the Clarkii OIE menu. The following options are available in the **Modify** menu:

    – Rotate

    – Crop

    – Resample

For instructions on using these and other functions, visit the following URL:

`http://www.online-image-editor-clarkii.com/`

3. In the asset's toolbar, click the **Save** icon to save the changes you made in the asset's Clarkii OIE enabled field.

3.5.4 Working with the Date Picker

When working with assets whose forms include a date field (such as a post date, release date, start/end date, and so on), you may visually select a date using the Date Picker attribute editor, in addition to the standard text box.

The Date Picker is a calendar-like interface similar to date selectors found in many personal information management applications (for example, Microsoft Outlook).

To enter a date using the Date Picker

1. In the asset's Create or Edit view, scroll to the Date Picker enabled field and click the **Pick a date** icon.

Figure 3–30   Date Picker Field

WebCenter Sites opens the Date Picker pop-up window:

Figure 3–31   Date Picker Pop-Up Window

2. In the Date Picker pop-up window, select the desired month, year, day, and time. Make sure you select the day last. When you click the desired day, the Date Picker

pop-up window automatically closes and the date you selected is reflected in the corresponding field.

3. In the asset's toolbar, click the **Save** icon to save your changes to the asset.

4

Creating, Sharing, and Editing Assets in Web Mode

This chapter describes the basic procedures for creating and editing assets in Web Mode, illustrated with examples from the avisports sample site.

This chapter contains the following:

- Section 4.1, "Overview"
- Section 4.2, "Creating Assets in Web Mode"
- Section 4.3, "Sharing Assets With Other Sites"
- Section 4.4, "Editing Assets in Web Mode"

4.1 Overview

Working with assets is permissions based. If you have the right permissions, you can create and edit assets using the WebCenter Sites Contributor interface. If an asset type is configured such that all assets of that type open in Web Mode, when you create or edit an asset of that type, the asset's web page view will be displayed to you (as shown in Figure 4–1).

Note: The Contributor interface provides two modes for creating new assets – Form Mode and Web Mode. This section only provides information about creating assets in Web Mode. For information about creating assets in Form Mode, see Section 3.1, "Creating Assets in Form Mode."

Depending on the configurations your developers made to your WebCenter Sites system, Web Mode might be disabled. In this section, we assume that Web Mode is enabled. For more information about whether Web Mode is enabled for your installation, see your developers.

Figure 4–1   "Surfing' Page Asset's Inspect View (in Web Mode)
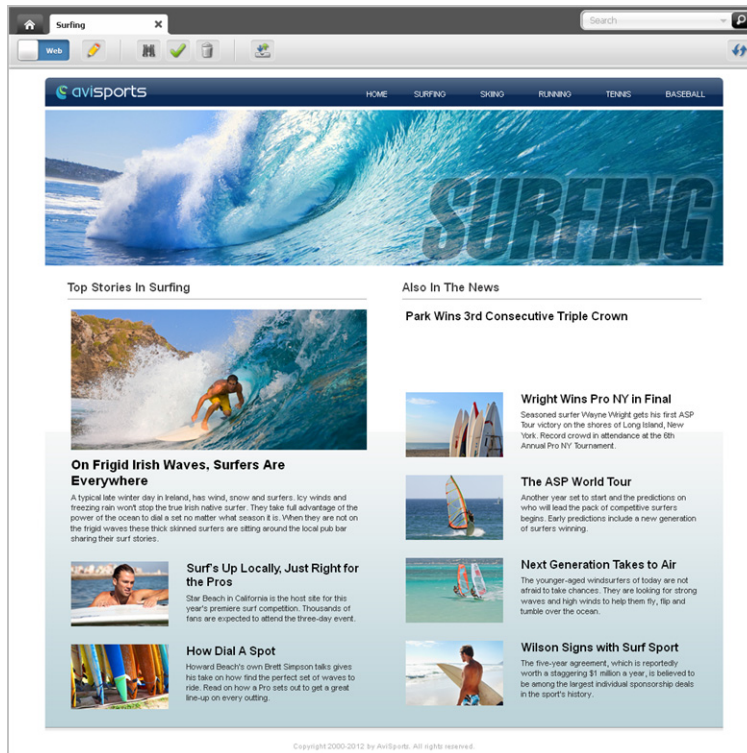
Web Mode offers in-context editing, which means you can work with assets directly in their published form (web page view). Instead of fields in a content entry form, it is the web page layout (template) assigned to the asset that determines the editable areas of an asset rendered in Web Mode. Editable areas can include simple text areas, WYSIWYG editor enabled text areas, and slots. Below shows an example Edit view of the Surfing page asset rendered in Web Mode displaying empty and occupied slots.

Figure 4–2   'Surfing' Page Asset's Edit View (in Web Mode)
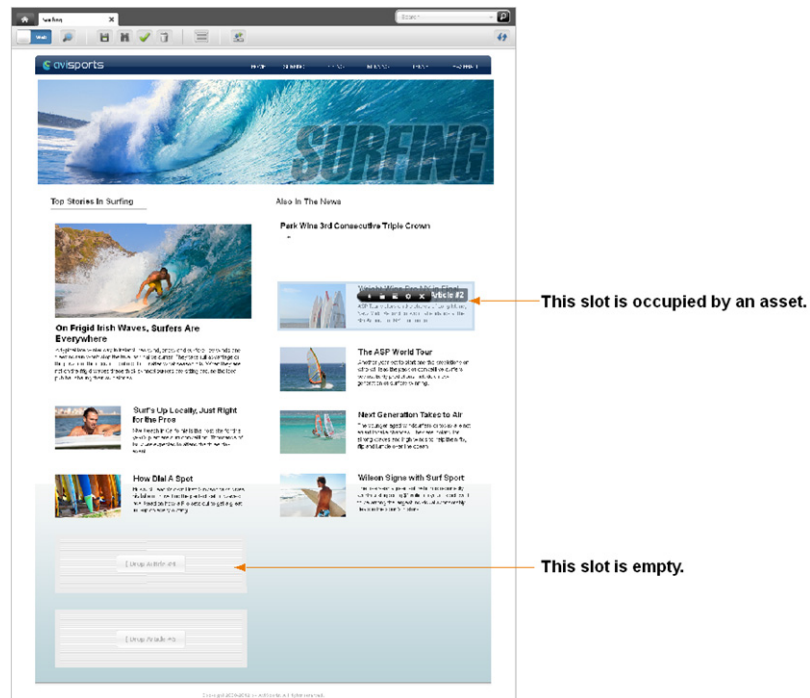
4.1.1 What is a Slot?

If the web page layout (template) assigned to the asset is configured to support slots, the asset's Create and Edit views will display empty and/or occupied slots (as shown in Figure 4–2 and Figure 4–3). Each slot accepts one piece of content – an asset (unless the slot is multi-valued, in which case the slot will accept more than one asset). If the slot supports drag and drop functionality, you can drag an asset from a tree or search results list and drop the asset into the desired slot. If the slot does not support drag and drop functionality, it will usually contain a predefined asset (such as a recommendation asset) which your developers or administrators have configured in the web page layout (template) assigned to the asset.

Figure 4–3   Empty and Occupied Slots ('Surfing' Page Asset)
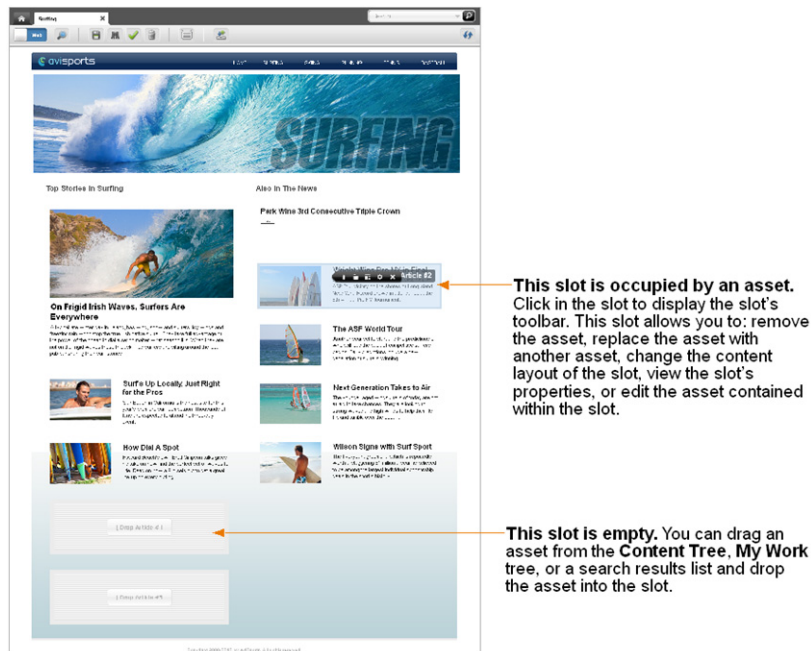
By adding an asset to a slot, you are creating an association between the asset with which you are working and the asset you placed in the slot. The type of asset each slot supports is determined by the configurations your developers made to the web page layout (template) assigned to the asset.

When you click in a slot, a toolbar with content management options you can perform on the slot is displayed (as shown in Figure 4–2). Using the toolbar you can edit the content of the asset contained within the slot, change the content layout of the slot (which changes the appearance of the asset in the slot), view the slot's properties, and/or remove the asset from the slot. If you are working with a multi-valued slot (which accepts multiple assets), you will see a **Manage** option that allows you to reposition the order in which the assets contained within that slot are displayed on the web page. The options available in a slot's toolbar are determined by the configurations your developers made to the web page layout (template) assigned to the asset with which you are working.

4.1.2 What is the Difference Between Web Page Layout and Content Layout?

Web page layout is the layout (template) assigned to the asset with which you are working. When working with an asset in Web Mode, the web page layout assigned to the asset determines the arrangement of the slots in the asset's web page view (as shown in Figure 4–2 and Figure 4–3). Content layout is the layout (template) assigned to an individual slot. The content layout assigned to a slot determines the appearance of the asset contained within that slot.

A slot enables you to select a different content layout with which to render the content contained within it. When you change the content layout of a slot, the asset contained within the slot is rendered using the layout you selected. Figure 4–4 provides a diagram showing the difference between web page layout and content layout.

Figure 4–4   Web Page Layout vs. Content Layout
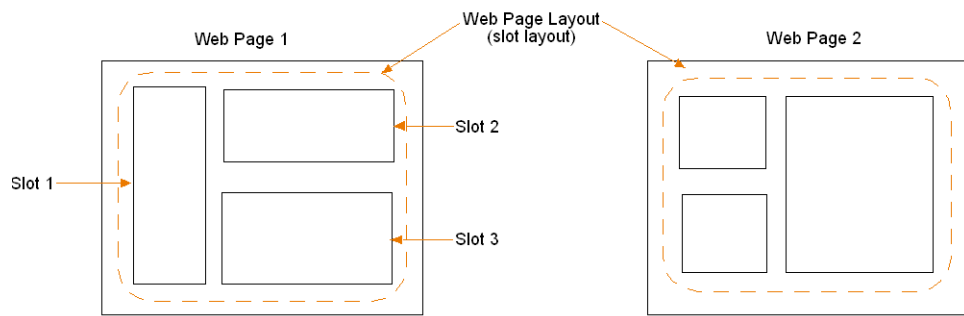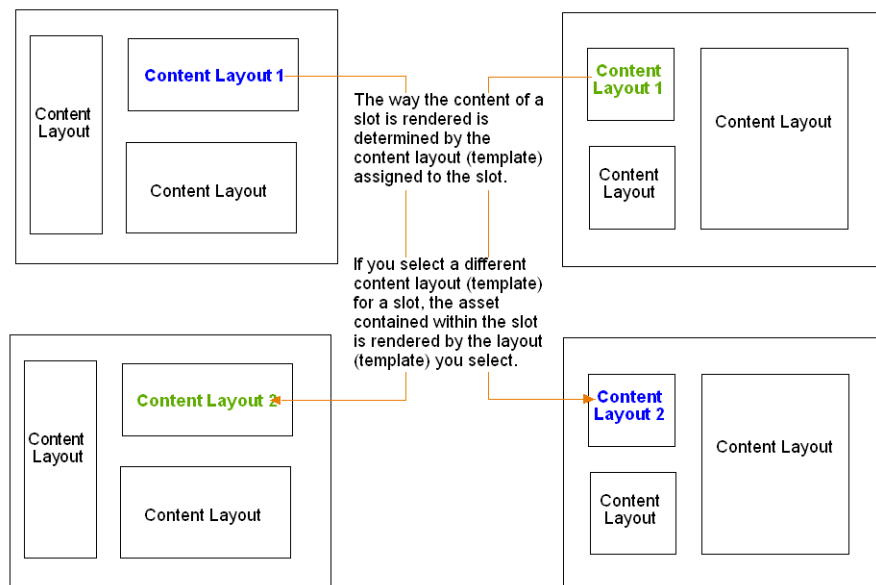
4.2 Creating Assets in Web Mode

The types of assets you can create are determined by the asset types that are available in the Contributor interface and your assigned permissions. If you have the right permissions, you can create brand new assets "from scratch," using the WebCenter Sites Contributor interface. If the new asset that you want to create is similar to an existing one, you can copy the existing asset and make changes to the copy, which saves you a few steps. If an asset currently exists on one site and you need to create the same asset for a different site, you can share the asset so that you do not have to create it more than once.

4.2.1 How Many Ways Can You Create Assets?

For information about the different ways you can create assets in the Contributor interface, see Section 3.1.1, "How Many Ways Can You Create an Asset?"

4.2.2 If You Use Web Mode, Will You Need to Switch to Form Mode?

When you are working with an asset in Web Mode, the editable areas you see are determined by the configurations your developers made to the web page layout (template) assigned to the asset. The fields you see in an asset's content entry form

(when working with the asset in Form Mode) are not necessarily the same fields that will be available to you when working with the asset in Web Mode. Therefore, certain fields such as date and Locale fields may not be available in Web Mode. In addition, certain attribute editors are only supported in Form Mode (for example, Clarkii Online Image Editor). In such cases, you will have to switch to Form Mode to fill in those fields. For instructions about switching to Form Mode, see step 8 on page 4-12 in Section 4.2.3, "Creating a New Asset in Web Mode."

4.2.3 Creating a New Asset in Web Mode

If the administrator configured an asset type to be created in Web Mode and listed in your "New" menu (from the **Content** menu, select **New**), you can create assets of that type by entering information into the web page view of the asset.

To create a new asset in Web Mode

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Select the type of asset you wish to create. In the menu bar, select **Content**, then select **New**, and then *select the type of asset you wish to create*. (To follow this example, select the **Article** asset type.)

   The "Create *Asset*" dialog box is displayed.

Figure 4–5 'Create Asset' Dialog Box

3. In the "Create *Asset*" dialog box, do the following:

   a. In the "Select Layout" field, select the layout you want to assign to the asset.

      The layout you select determines how the asset's Create view is displayed in Web Mode.

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

      – The name must be between 1 and 64 alphanumeric characters.

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

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

   c. Click **Continue**.

4. If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, you will see the "Choose Assignees" dialog box:

Figure 4–6   'Choose Assignees' Dialog Box
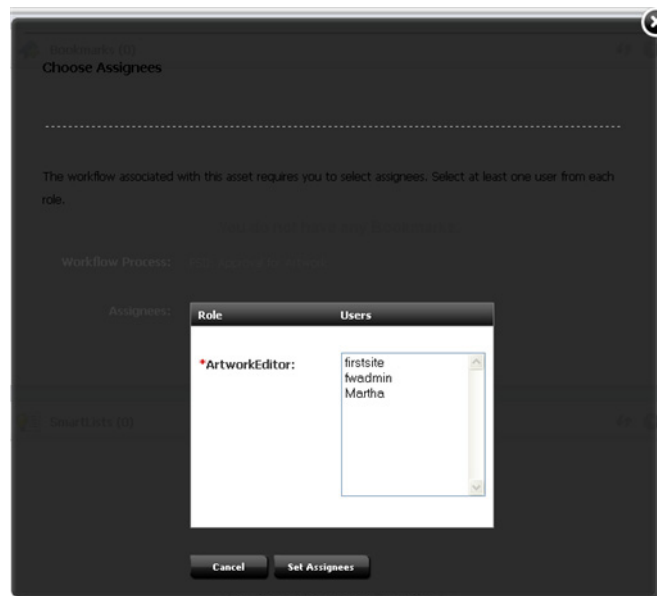
Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process. For more information, see Chapter 16, "Workflow."

A new tab opens displaying the asset's Create view in Web Mode. ("Article" asset in this example.)

Figure 4–7   New Asset Displayed in Web Mode
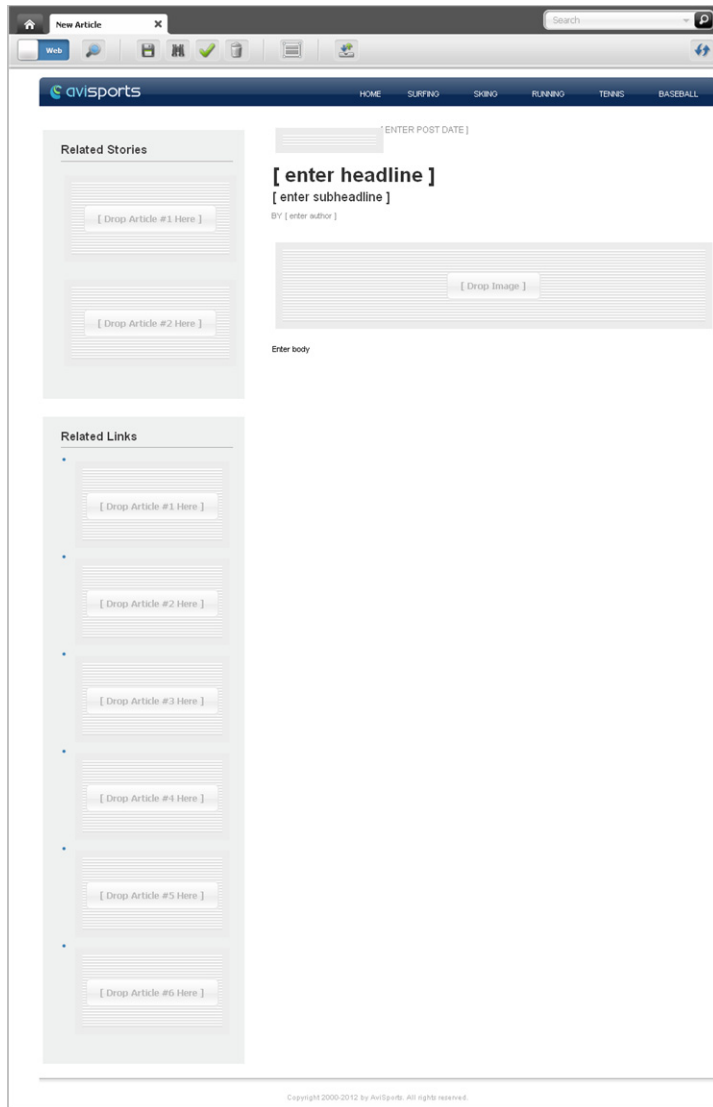
The layout you assigned to the asset determines the editable areas you will see in the asset's Create view.

5. 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 will be highlighted when you point to them (as shown in Figure 4–8):

Figure 4–8   Areas that Accept Content in Web Mode
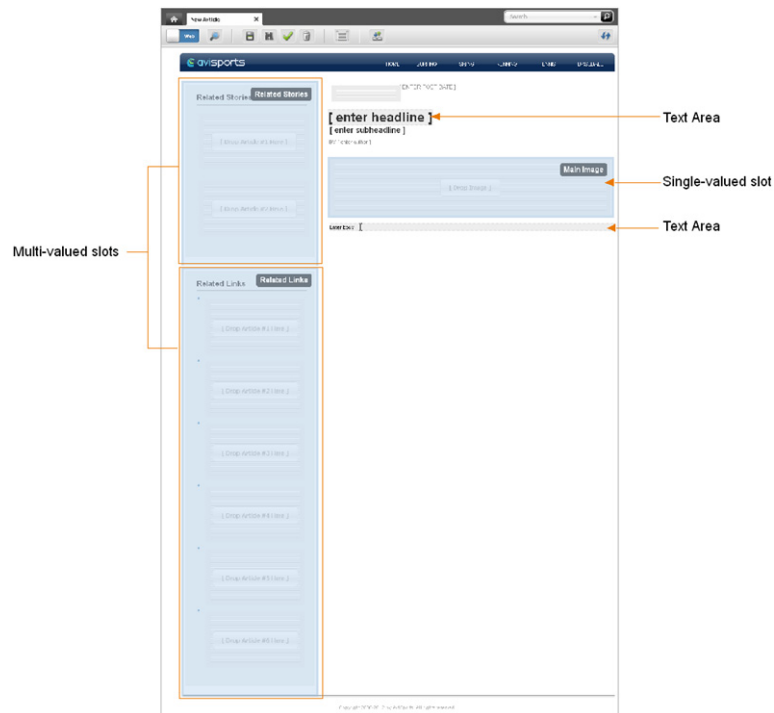
6. Click in the highlighted areas to determine the type of content each area supports. The types of editable areas you will see and how those areas are displayed in the asset's web page view are determined by how your developers have coded the asset's web page layout (template). Figure 4–9 is an example of the areas you may see when working with an asset in Web Mode:

Figure 4–9   Slots and Text Fields Displayed in Web Mode
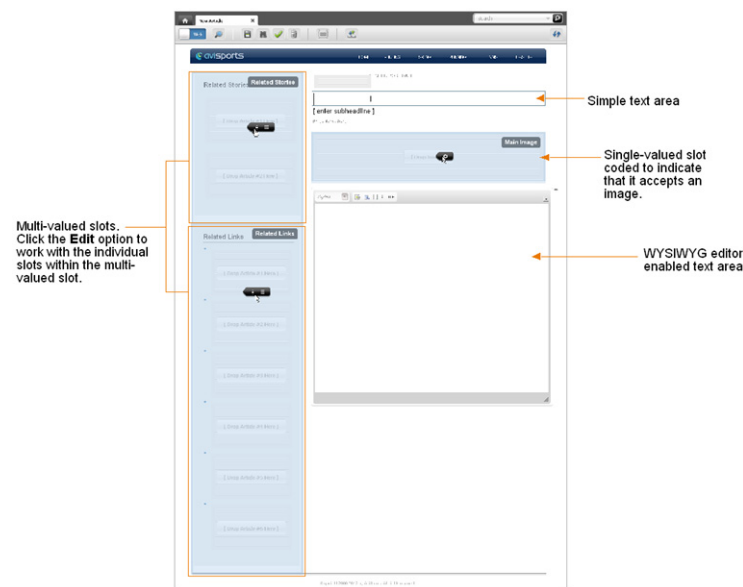
7. Populate the asset's Create view. Click in an editable area to determine the type of content the area accepts. The differences between the editable areas you may see when populating the asset are as follows:

- **Text Areas.** You may see one or more areas that allow you to enter text. These areas may display predefined sample text describing the type of content that should be entered. When you point to a text area, it becomes highlighted in grey and your cursor appears as a text-selecting I-beam. For example:

Figure 4–10   Text Area

Click in the text area to enter the desired text. When you click in the text area, you will see one of the following:

- **Simple Text field**. You can enter text into a simple text field, but you cannot format the appearance of that text.

Figure 4–11   Simple Text Field

- **WYSIWYG text field**. If the text area supports an embedded WYSYWYG editor (such as CKEditor), the WYSYWYG editor is displayed. These text fields allow you to enter and format your content using controls similar to Microsoft Word.

Figure 4–12   WYSIWYG Text Field
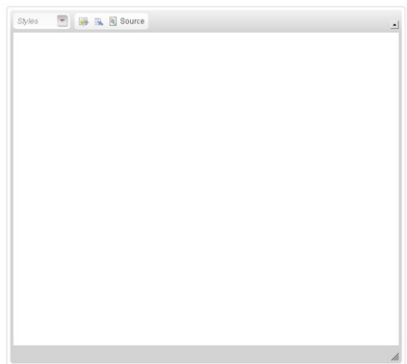
- **Date area.** You may see one or more areas that allow you to select a date. For example:

Figure 4–13   Date Area

Clicking in one of these areas invokes the Date Picker attribute editor. For more information, see Section 3.5.4, "Working with the Date Picker."

– **Slots.** You may see one or more areas that display either predefined content or an empty slot. These areas are highlighted with a blue overlay when you point to them.

Figure 4–14   Populated and Empty Slot

To work with a slot, do the following:

a. Click in the desired slot to display its toolbar. Depending on how the slot is coded in the web page layout (template) assigned to the asset, you may see one or more of the following content management options:

Figure 4–15   Slot Toolbar

From left to right in the toolbar (displayed above), the options are the following:

Edit – Allows you to edit the content of the asset contained within the slot directly in the web page view of the asset you are creating. For more information, see Section 4.4.4.2, "Editing the Content of an Associated Asset."

Open in New Tab – Opens a tab displaying the Inspect view of the asset contained within the slot. For more information, see Section 4.4.1, "Editing the Content of an Asset in Web Mode."

Change content layout – Allows you to select a content layout (template) with which to render the slot's content. For more information, see Section 4.4.3, "Changing Content Layout."

Slot properties – Provides you with a list of asset types the slot supports. For more information, see step c.

Clear slot – Removes the content from the slot. For more information, see Section 4.4.4.3, "Removing Associations."

The following option is only available in a multi-valued slot's toolbar:

Manage – Allows you to manage the position of the assets contained within a multi-valued slot. For more information about multi-valued slots, see Section 4.4.4.4, "Changing the Position of Content Displayed in a Multi-Valued Slot."

b. If the slot is multi-valued, when you click in the slot, its toolbar displays the **Edit** and **Manage** options. Click **Edit** to access the individual slots within the multi-valued slot, as shown below:

Figure 4–16   Multi-Valued Slot
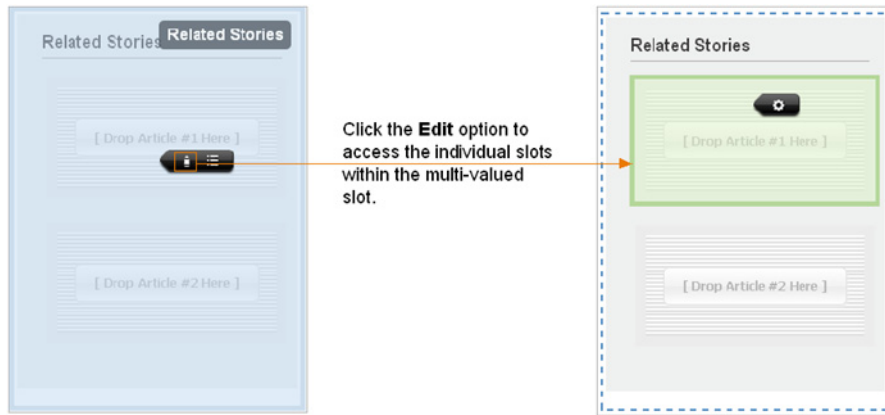
    c. Determine the type of content a slot supports. Click in the slot and then click the Slot properties option in the slot's toolbar.

Figure 4–17   'Slot Properties' Dialog Box

    d. Determine if the slot supports drag and drop functionality by dragging an asset from the **Content Tree**, **My Work** tree, or a search results list to the desired slot.

        If the slot's border turns green, then the slot accepts that type of asset. In this case, drop the asset into the slot. If the slot's border turns red, the slot either does not accept this type of asset or does not support drag and drop functionality.

        For more information about adding content to a slot, see Section 4.4.4.1, "Adding or Replacing an Association."

8. If the web page layout (template) assigned to the asset you are creating is not coded to display certain fields in Web Mode, (for example, date and 'Locale' fields), then those fields will only be available in Form Mode. To populate these fields, you will have to switch to Form Mode:

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

        The tab re-displays the asset in Form Mode.

    b. Fill in the required fields. For instructions, see step b in Section 3.1.2, "Creating a New Asset in Form Mode."

    c. Switch back to Web Mode. In the asset's toolbar, click the **Mode** switch.

        The tab re-displays the asset in Web Mode.

9. 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.

10. 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 Mode. You cannot modify the asset's content when the asset is displayed in the Inspect view.

11. (Optional) 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 as described in Section 16.4.1, "Assigning an Asset to a Workflow."

12. Preview the asset:

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

       The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

    b. If you wish to make additional changes to the asset, do the following:

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

          The tab displays the Inspect view of the asset.

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

          The tab displays the Edit view of the asset. For more information about editing assets in Web Mode, see Section 4.4, "Editing Assets in Web Mode."

13. 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.

4.2.4 Creating a New Asset by Copying an Existing Asset

The procedure for copying assets is the same for both Form Mode and Web Mode. For instructions about creating a new asset by copying an existing asset, see Section 3.1.3, "Creating Assets by Copying Existing Assets."

4.3 Sharing Assets With Other Sites

The procedure for sharing an asset with different sites is the same for both Form Mode and Web Mode. For instructions about sharing an asset with another site, see Section 3.2, "Sharing Assets with Other Sites."

4.4 Editing Assets in Web Mode

This section provides instructions on editing assets in Web Mode and contains the following:

- Section 4.4.1, "Editing the Content of an Asset in Web Mode"
- Section 4.4.2, "Changing Web Page Layout"
- Section 4.4.3, "Changing Content Layout"
- Section 4.4.4, "Editing Associations"

4.4.1 Editing the Content of an Asset in Web Mode

Web Mode 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 will be able to edit in Web Mode. Certain fields (such as date and 'Locale' fields) may only be accessible when working with an asset in Form Mode. Therefore, to edit the content of these fields you will have to switch to Form Mode.

To edit the content of an asset in Web Mode

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   – Search for and open the desired asset:

   a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

   b. In the search results list, click the name of the asset.

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

   a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

   b. In the list of bookmarked assets, double-click the name of the desired asset.

   Note: If you want to edit the asset without first inspecting it, in the list of assets, right-click the desired asset and select **Edit** from the context menu. Continue to step 4b. If the asset's Edit view is displayed in Form Mode, switch to Web Mode by clicking the **Mode** switch in the asset's toolbar.

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

4. Edit the asset:

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

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

Figure 4–18   Edit View of an Asset in Web Mode
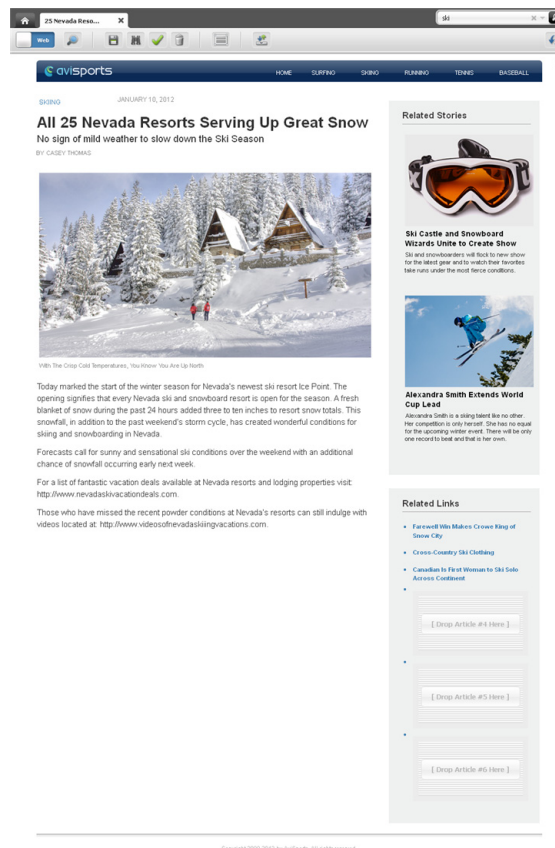
b. Make your changes to the asset. See steps 5 – 8 for details on the editable areas you may see when working with an asset in Web Mode.

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 field(s).

– An entry or selection you have made in one or more field(s) 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 Mode. 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 as described in the section Section 16.4, "Using Workflow Functions."

8. Preview the asset:

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

   The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

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

   The tab re-displays the asset in Web Mode.

4.4.2 Changing Web Page Layout

The web page layout (template) assigned to an asset determines the position of the slots displayed on the web page view of the asset. If you select a different layout (template) for the asset, the slots and other editable areas will be rendered in different positions, 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 Mode.

To change the web page layout of an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

- Search for and open the desired asset:

   a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

   b. In the search results list, click the name of the asset.

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

   a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

   b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **Home** Page asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

   b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

Figure 4–19   Edit View of an Asset in Web Mode
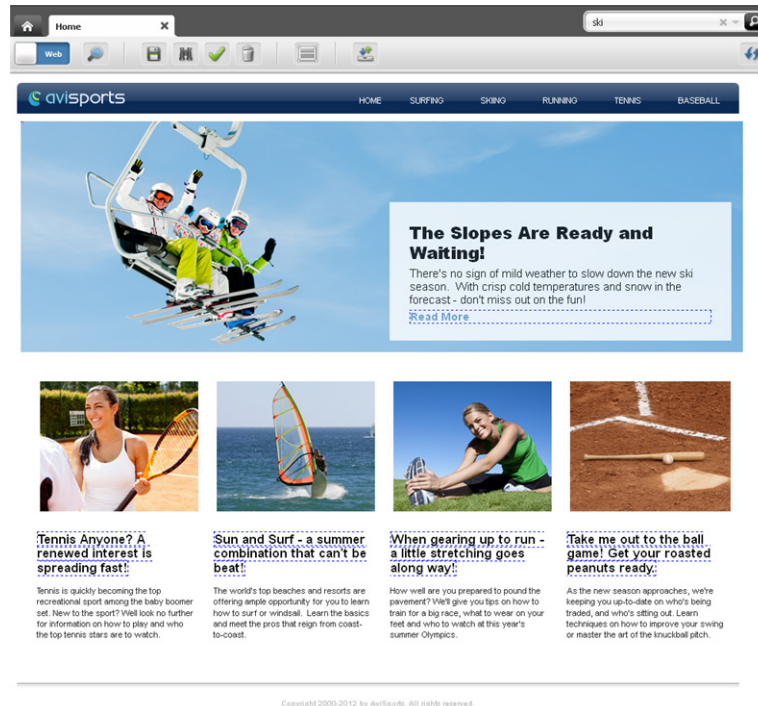
5. Change the web page layout (template) of the asset:

    a. 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.

Figure 4–20   'Change Page Layout' Dialog Box
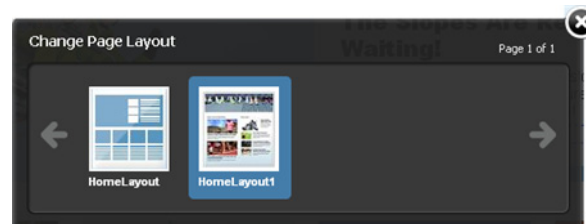
    b. Select the web page layout (template) you wish to assign to the asset, then click **Apply**.

    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 field(s).

- 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 Mode. When you inspect an asset, you cannot modify its content.

8. Preview the asset:

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

   The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

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

   The tab re-displays the asset in Web Mode.

4.4.3 Changing Content Layout

Each slot is assigned a content layout (template). The content layout of a slot determines how the asset contained within the slot is displayed. 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. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   - Search for and open the desired asset:

     a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

     b. In the search results list, click the name of the asset.

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

     a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

     b. In the list of bookmarked assets, double-click the name of the desired asset.

     For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **Tennis** Page asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

   b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

Figure 4–21   Edit View of an Asset in Web Mode
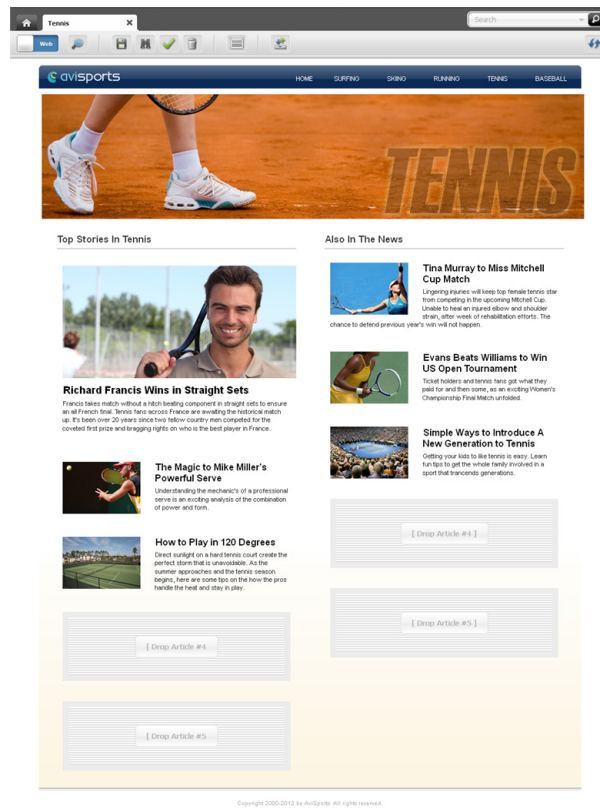
5. Change the content layout (template) of a slot containing an asset:

   a. Click in the slot whose content layout (template) you wish to change. For example:

Figure 4–22   Single-Valued Slot Toolbar

If the slot is multi-valued, when you click it, two or more slots will be highlighted along with the slot whose content layout you wish to change. In

this case, the toolbar will display only the **Edit** and **Manage** options (shown below). Click the **Edit** option.

Figure 4–23   Multi-Valued Slot Toolbar

Now you can click the individual slots within the multi-valued slot. Click the desired slot to display its toolbar.

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

Figure 4–24   Slot Toolbar – Change Content Layout

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.

Figure 4–25   'Change Content Layout' Dialog
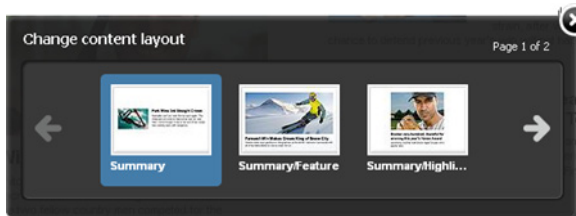
c. Select the desired layout and then click **Apply**.

The content contained within the slot is rendered with the selected layout. For example:

Figure 4–26   Populated Slot

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 field(s).

- An entry or selection you have made in one or more field(s) 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 Mode. When you inspect an asset, you cannot modify its content.

8. Preview the asset:

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

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

The tab re-displays the asset in Web Mode.

4.4.4 Editing Associations

When working with an asset in Web Mode, 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.

This section contains instructions on the following:

- Section 4.4.4.1, "Adding or Replacing an Association"

- Section 4.4.4.2, "Editing the Content of an Associated Asset"

- Section 4.4.4.3, "Removing Associations"

- Section 4.4.4.4, "Changing the Position of Content Displayed in a Multi-Valued Slot"

4.4.4.1 Adding or Replacing an Association

This section shows you how to create or replace an association between two assets by dragging and dropping the asset you wish to associate into the desired slot space of the asset you are working with in Web Mode.

To add or replace an association

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

- Search for and open the desired asset:

a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

b. In the search results list, click the name of the asset.

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

    a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

    b. In the list of bookmarked assets, double-click the name of the desired asset.

    For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

    A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

   b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

5. Determine the slot into which you wish to place the asset. If the slots are already populated, determine which slot's content you wish to replace.

6. Associate an asset to the asset you are working with:

   a. Find the asset you want to place in the slot. Do one of the following:

   - In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

       The search results list is displayed to the right of the asset you are working with.

   - If you previously bookmarked the asset, expand the **Bookmarks** node in the **My Work** tree. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

   b. In the list of assets, click the name of the asset you want to add to the slot, hold down the button on the mouse and drag the asset to the desired slot, as shown in Figure 4–27.

Figure 4–27   Drag an Asset to a Slot
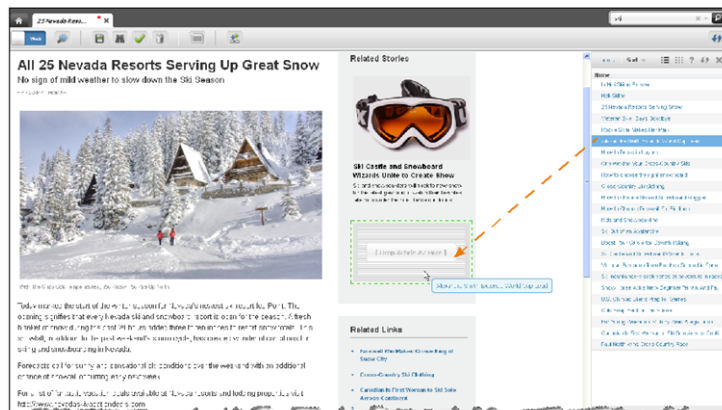
As you drag the asset to the desired slot, the asset's name is displayed as a floating object. The slot into which you can drop the asset can either be empty or occupied. In Figure 4–28, the asset is being dragged over an empty slot.

Figure 4–28   Slot Surrounded by Green Border

When you hover the asset over the slot, if the slot supports that type of asset, a green-dotted border is displayed around it (as shown above). If the slot does not support that type of asset, a red-dotted border is displayed around it.

c.   Drop the asset into the slot.

Figure 4–29   Slot Populated with Content
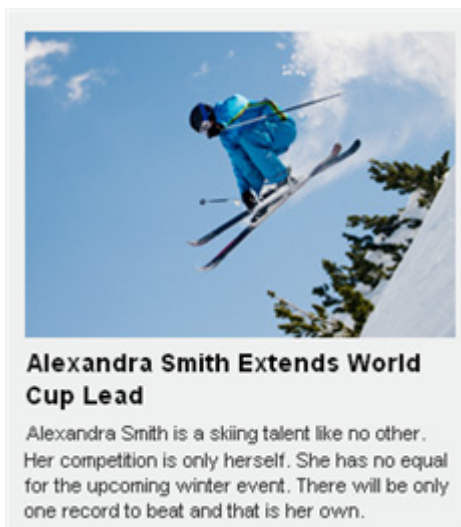
The asset you dropped into the slot is now associated with the asset you are working with. If the slot into which you drop the asset is already populated, the asset that was replaced is removed from the slot and as an association of the asset with which you are working.

7. Save your changes 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 field(s).

   – An entry or selection you have made in one or more field(s) 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.

8. 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 Mode. When you inspect an asset, you cannot modify its content.

9. Preview the asset:

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

      The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

   b. When you are done previewing the asset, click the **Go Back** icon to display the asset in Web Mode.

4.4.4.2 Editing the Content of an Associated Asset

When working with an asset in Web Mode, you can edit the content of its associated asset(s) either directly in the slot which displays the associated asset or in a new tab. If you edit the content of an associated asset in a new tab, when you save that asset, the changes you made are reflected in the slot that displays the asset.

To edit the content of an associated asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   – Search for and open the desired asset:

     a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

     b. In the search results list, click the name of the asset.

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

     a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

      For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

      A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

      b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

Figure 4–30 Edit View of an Asset in Web Mode
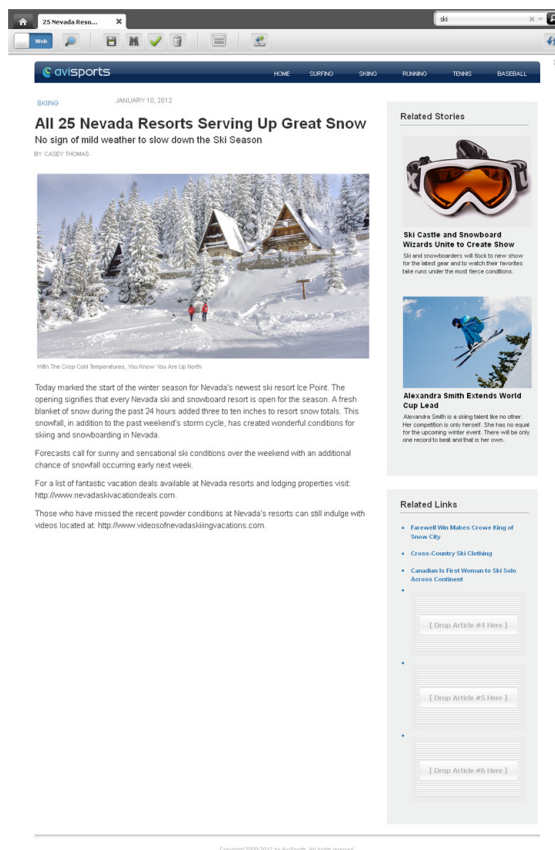
5. Click the slot containing the associated asset you wish to edit.

      The slot toolbar is displayed. If the slot is configured to allow you to edit its content, you will see either the **Edit** option, the **Open in new tab** option, or both.

Figure 4–31   Slot Toolbar

If the slot is multi-valued, when you click it, you will see only the **Edit** and **Manage** options. Click the **Edit** option to access the individual slots within the multi-valued slot. Click an individual slot to display its toolbar (shown in Figure 4–31).

6. Edit the associated asset displayed in the slot. Do one of the following:

   – If you wish to edit the associated asset directly in the slot:

     a. In the slot's toolbar, click the **Edit** option.

     b. Point to the areas of the asset. Any area that becomes highlighted is editable.

     c. Make your changes to the associated asset.

   – If you wish to edit the associated asset in a new tab:

     a. In the slot's toolbar, click the **Open in new tab** option.

        A new tab opens displaying the Inspect view of the associated asset in either Form Mode or Web Mode.

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

     c. Make your changes to the associated asset.

        If the asset is displayed in Web Mode, see steps 5 – 8 in Section 4.2.3, "Creating a New Asset in Web Mode" for details on the fields you may see.

        If the asset is displayed in Form Mode, see step 4 in Section 3.1.2, "Creating a New Asset in Form Mode" for details on the fields you may see.

     d. Save and close the asset. In the menu bar, select **Content**, then select **Save & Close**.

     e. Switch back to the tab displaying the asset you are working with (which you opened in step 2 of this procedure.

     f. Refresh the asset whose slot displays the associated asset you edited. In the asset's toolbar, click the **Refresh** icon.

        The slot containing the associated asset you edited displays the asset with the changes you made.

7. Save your changes 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 field(s).

   – 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.

8. 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 Mode. When you inspect an asset, you cannot modify its content.

9. Preview the asset:

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

   The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

   b. When you are done previewing the asset, click the **Go Back** icon to display the asset in Web Mode.

4.4.4.3 Removing Associations

When you are working with an asset in Web Mode and you remove an asset from a slot, you are also removing the association between the asset you are working with and the asset you removed from the slot.

To remove an associated asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   – Search for and open the desired asset:

     a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

     b. In the search results list, click the name of the asset.

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

     a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

     b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

   b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

Figure 4–32   Edit View of an Asset in Web Mode
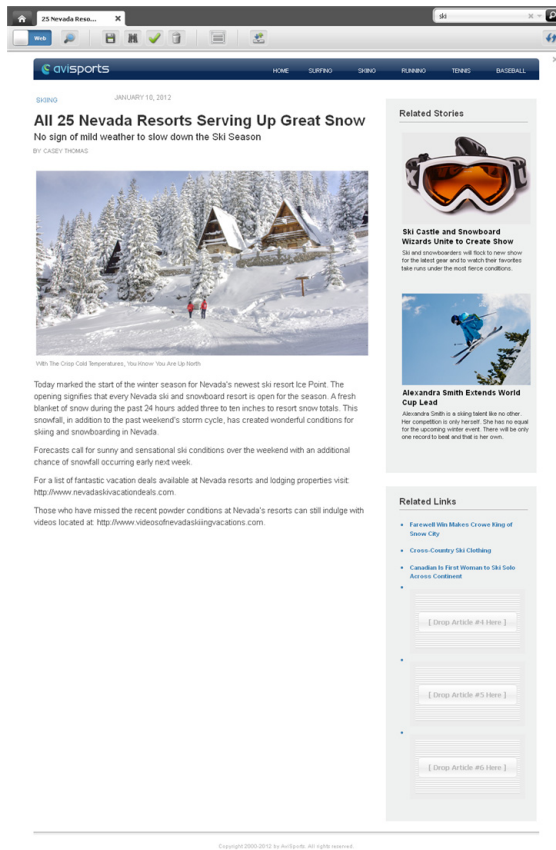
5. Click the slot containing the asset you wish to remove.

The slot's toolbar is displayed.

Figure 4–33   Slot Toolbar

6. Click the **Clear Slot** (**X**) option to remove the asset from the slot.

The asset is removed from the slot. The asset you removed is no longer associated with the asset you are working with.

7. Save your changes 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 field(s).

– 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.

8. 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 Mode. When you inspect an asset, you cannot modify its content.

9. Preview the asset:

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

   The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

   b. When you are done previewing the asset, click the **Go Back** icon to display the asset in Web Mode.

4.4.4.4 Changing the Position of Content Displayed in a Multi-Valued Slot

If the asset you are working with in Web Mode has a multi-valued slot, you can reposition the order in which its associated assets are displayed on the web page by moving an asset from one slot to another.

To change the order in which content is displayed in a multi-valued slot

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset. Do one of the following:

   – Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      b. In the search results list, click the name of the asset.

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

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode. (In this example, we use the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. If the asset is displayed in Form Mode, switch to Web Mode.

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

   b. If the asset is not assigned to a template (web page layout), the "Select Layout" dialog box is displayed. Select the desired layout and then click **Apply**.

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

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

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

Figure 4–34   Edit View of an Asset in Web Mode
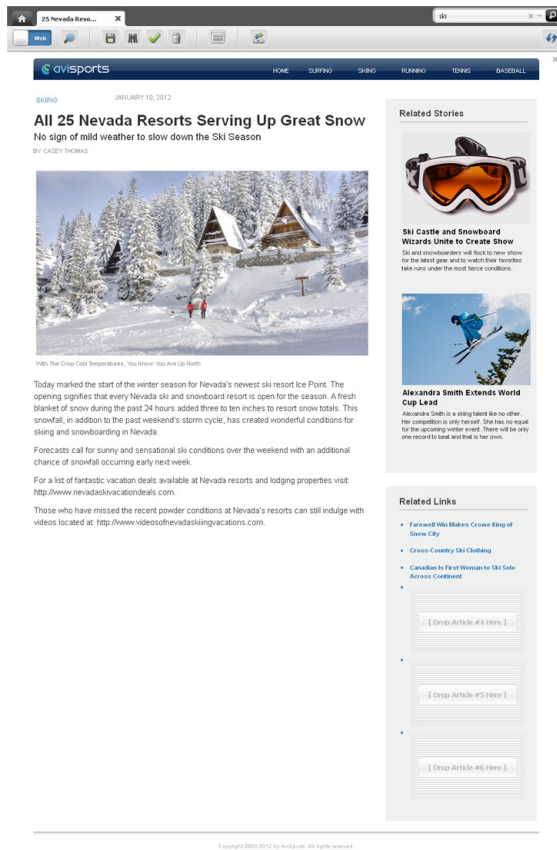
5. Determine which slot is multi-valued. The configurations your developers made to the web page layout (template) assigned to the asset determines how multi-valued slots are displayed in an asset's Edit view. For information about which slots are multi-valued on your site, see your developers.

In our example (working with the **25 Nevada Resorts Serving Snow** "Article" asset), when you point to a multi-valued slot, two or more slots associated with the multi-valued slot are highlighted with a blue overlay, as shown below:

Figure 4–35　Multi-Valued Slot

6. Click in the desired multi-valued slot. A multi-valued slot's toolbar displays the **Edit** and **Manage** options. For example:

Figure 4–36　Multi-Valued Slot's Toolbar

7. In the multi-valued slot's toolbar, click the **Manage** option.

The following dialog box opens:

Figure 4–37　Multi-Valued Slot's 'Manage Slot Content' Dialog
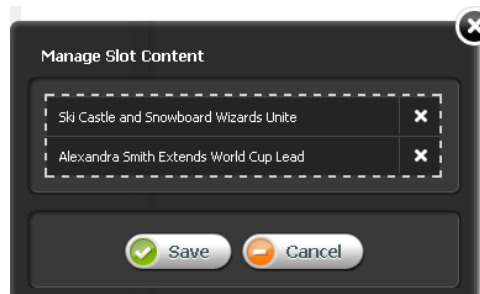
8. In the "Manage Slot Content" dialog box, reposition the assets displayed in the multi-valued slot. Click the name of the desired asset and then drag and drop it into the desired position.

Figure 4–38   Re-Ordering Assets in a Multi-Valued Slot
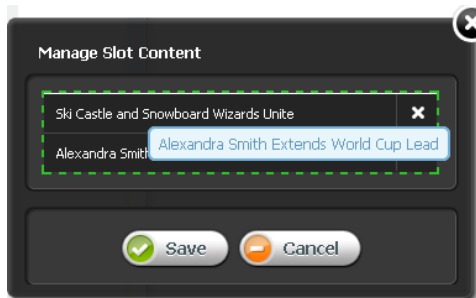
9. Click **Save**.

    The assets are displayed in the desired order in the multi-valued slot.

Figure 4–39   Multi-Valued Slot – Assets Displayed in Desired Position
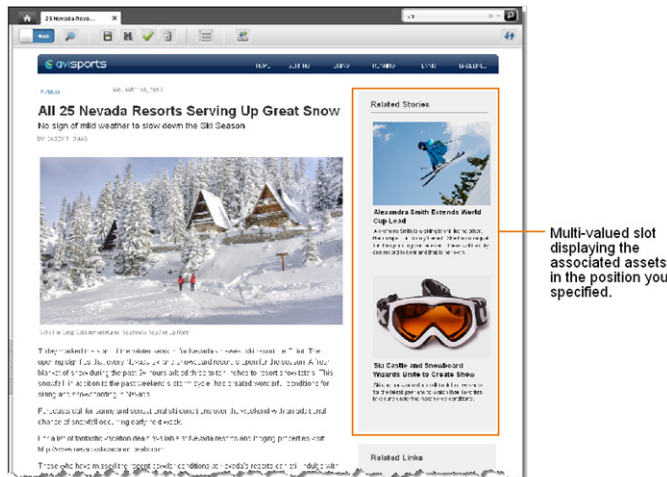
10. Save your changes by doing one of the following:

    – 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 field(s).

    – 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.

11. 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 Mode. When you inspect an asset, you cannot modify its content.

12. Preview the asset:

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see Chapter 7, "Previewing Assets."

b. When you are done previewing the asset, click the **Go Back** icon to display the asset in Web Mode.

5

Deleting Assets

This chapter contains instructions for deleting assets from the WebCenter Sites database.

This chapter contains the following sections:

- Section 5.1, "Overview"
- Section 5.2, "Asset Deletion Rules"
- Section 5.3, "How Do I Delete Assets?"

5.1 Overview

Use the WebCenter Sites delete function to delete assets from the WebCenter Sites database. This function allows the deletion of multiple assets at one time, if desired.

When you use the Delete function, the asset is not entirely removed from the database. The contents of the asset are emptied; however, the ID remains in the database as a record of the asset's existence. This simple record is called a "voided asset."

When a previously published asset is voided in the content management system, the voided asset is automatically approved for publishing to any destination the asset has ever been published to. The voided asset is placed in the publish queue, and published during the next publishing session. The voided asset then overwrites the previously published asset.

Voided assets are not returned in search results.

5.2 Asset Deletion Rules

The following restrictions are enforced when you delete assets:

- You can delete an asset only if you have the permissions to do so.
- If an asset is in a workflow and is assigned to someone other than you, you cannot delete that asset even if you have the permissions to delete assets.
- You cannot delete a placed "Page" asset.
- You cannot delete an asset if it is associated with another asset. If you attempt to do so, WebCenter Sites displays a list of the references preventing deletion. You can then remove the references and continue with the deletion.

5.3 How Do I Delete Assets?

> **Caution:** Be careful when you delete assets. You cannot "undo" a
> deletion.

To delete assets

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the asset(s) to delete. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

   A "Search" tab opens displaying a list of assets matching your search criteria.

   For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

3. Select the asset(s) you wish to delete. Do one of the following:

   – **If you want to inspect an asset before you delete it:**

   a. In the list of search results, click the name of the asset you wish to delete.

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

   b. In the asset's toolbar click the **Delete** icon.

   – **If you want to delete multiple assets:**

   a. In the list of search results, select (**Ctrl** + click) the assets you wish to delete.

   b. In the "Search" tab's toolbar, click the **Delete** icon.

   The "Delete Asset(s)" screen displays a table with deletion details for the asset(s) you wish to delete:

Figure 5–1   'Delete Assets' Screen
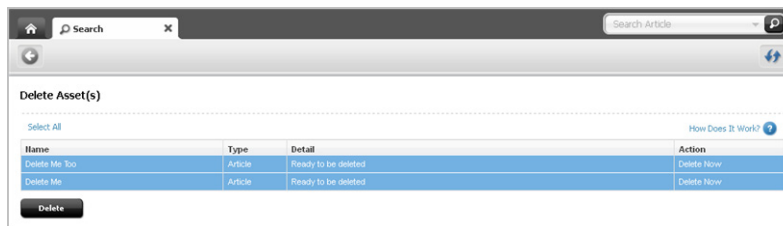
4. Delete the asset(s). In the "Delete Asset(s)" screen, click **Select All** and then click **Delete**.

   One of the following happens:

   – If the assets you are deleting do not reference any other assets, the "Detail" column of the table displays the message "Asset Deleted" in the row associated with each deleted asset.

     The database status of the deleted asset(s) changes to "void."

   – If any of the assets you selected to delete have dependencies preventing the deletion, the "Detail" column of the table displays the message "Asset cannot

be deleted due to *n* reference(s)." In this case, click **View References** in the "Action" column of the asset.

The assets blocking the deletion are displayed, below the table containing the assets you wish to delete, in the "Assets that reference *Name of Asset*" section. If you do not remove the references to an asset, the asset cannot be deleted. Continue to step 5.

Figure 5–2   'Delete Assets' Screen – Message Stating One Asset Cannot be Deleted
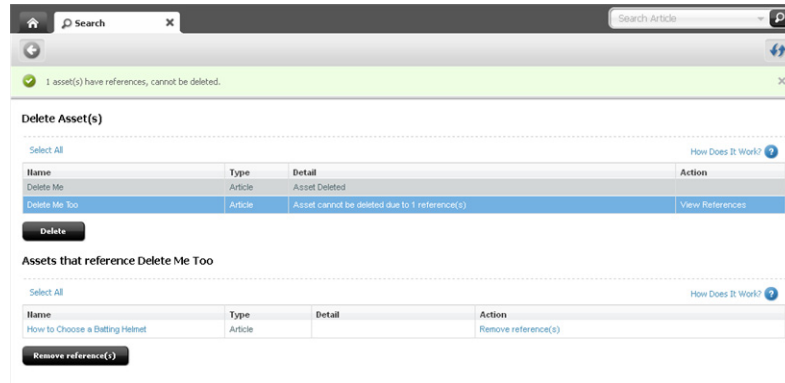
5.   Remove reference(s) in the "Action" column of each referenced asset's row.

   ■   To remove all referenced assets at once, click Select All and then click Remove reference(s).

   ■   If you do not wish to remove any of the references at this time, you have the option of cancelling out of the deletion by clicking the **Go Back** icon.

When you remove the reference(s) to the asset you wish to delete, the "Action" column of that asset displays the link "Delete Now."

Figure 5–3   'Delete Assets' Screen – 'Delete Now' link
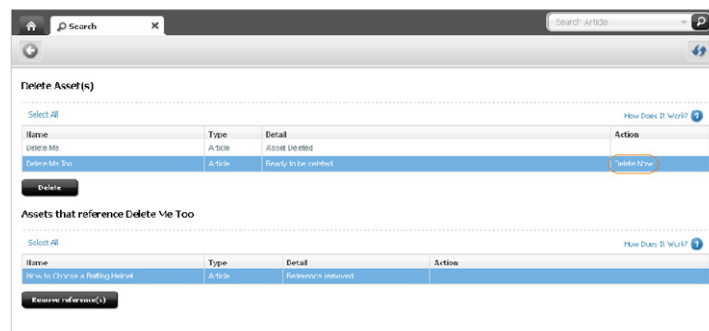
6.   Delete the asset(s). In the "Delete Asset(s)" section, select the asset(s) you wish to delete and then click **Delete**. You can also delete assets individually by clicking the **Delete Now** link in each desired asset's "Action" column.

The database status of the deleted asset(s) changes to "void." The asset(s) will be deleted from the website during the next publishing session. For information about publishing, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

6

Finding and Organizing Assets

WebCenter Sites provides an easy and effective way to find assets you want to work on. Once 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.

This chapter describes the basic procedures for finding and organizing assets, illustrated with examples from the avisports sample site.

This chapter contains the following sections:

-

6.1 Overview of Finding Assets

WebCenter Sites allows you to easily find assets matching the criteria you specify. Note that search results will include only assets that you have permissions to work with. (Permissions are set by your administrator.)

6.1.1 Search Behavior in the WebCenter Sites Contributor Interface

The WebCenter Sites Contributor interface is integrated with the Lucene search engine. Because of this integration, the search behavior in the Contributor interface is as follows:

- Before you can perform searches in the Contributor interface, the administrator must enable search indexing on your system (through the WebCenter Sites Admin interface).

- The Contributor interface allows you to search across all asset types in a given site. You do not have to know the asset type of the asset(s) you want to find in order to begin a search. You do, however, have the option to limit your search to a specific asset type.

- The Contributor interface searches through the names and values of all fields within all assets. For example, you can search for all assets that contain the word **flowers** without having to select specific attribute names to search through.

■ The Contributor interface allows you to customize your searches by formulating your search queries, as described in Section 6.1.2, "Search Guidelines."

6.1.2 Search Guidelines

When performing searches in the Contributor interface, use the guidelines in the following table to formulate your search queries. Customizing your search queries allows you to perform more precise searches.

Note that searching is not case-sensitive. For example, searching for **Jack** will return assets that contain **Jack** and assets that contain **jack**.

To find...	...do the following	Example
Assets that contain a phrase.	Enclose the phrase in quotes.	To find assets that contain the phrase **blue flowers**, enter **"blue flowers"** as your search query.
Assets that contain variations of a term and match the character length of the term.	Use the **?** (question mark) symbol to indicate a single-character wildcard. A search term cannot begin with a wildcard.	To find assets that contain **test** or **text**, enter **te?t** as your search query. To find assets that contain either **book** or **back**, enter **b??k** as your search query.
Assets that contain variations of a term, but may not match the character length of the term.	Use the * symbol to indicate a multi-character wildcard. A search term cannot begin with a wildcard.	To find assets that contain **test**, **tester**, or **testing**, enter **test*** as your search query. To find assets that contain **jeanne** or **jeanine**, enter **jea*e** as your search query.
Assets that contain all of the specified terms.	Join the terms with the **AND** operator.	To find assets that contain both **jack** and **jill**, enter **jack AND jill** as your search query.
Assets that contain a specific term but do not contain another term you specify.	Exclude the unwanted terms using the **NOT** operator.	To find assets that contain **jack** but do not contain **jill**, enter **jack NOT jill** as your search query.
Assets that must contain a specific term and may contain another term you specify.	Precede a term with the **+** (required) operator to indicate it is a required term.	To find assets that must contain **jack** and may contain **jill**, enter **+jack jill** as your search query.
Assets that contain a specific term, excluding assets that also contain another term you specify.	Precede a term with the **-** (prohibited) operator to indicate the exclusion.	To find assets that contain **jack** but exclude those that also contain **jill**, enter **jack -jill** as your search query.
Assets that contain terms similar in spelling to the term you specify.	Append the **~** (tilde) operator to a term to perform a fuzzy search on that term.	To find assets that contain **jack**, including occurrences that are misspelled, enter **jack~** as your search query.

6.1.3 Types of Searches You Can Perform in the Contributor Interface

When searching for assets in the Contributor interface, you can perform either a simple search or an Advanced search:

■ **Simple searches** allow you to search for a keyword or phrase across names and values of all fields within all assets. Simple searches also enable you to narrow down the results of your search to a specific asset type. For instructions on performing a simple search, see Section 6.2, "Performing a Simple Search."

- **Advanced searches** allow you to search for assets by attributes: creation date, start and end date, locale, unique identifier, name, description, tags, author, and type – or any combination of these items. For instructions on performing an advanced search, see Section 6.3, "Performing an Advanced Search."

You can also save the search criteria you used to perform a search (simple or Advanced). You can either save your search criteria as a Saved Search so that you can run the search at another time, or as an asset (of type ContentQuery) which can then be placed on a page and the results of the query are displayed to site visitors who access that page.

6.2 Performing a Simple Search

> **Note:** The asset types for which you can search are determined by your permissions and the asset types available from the Contributor interface.

To search for an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Specify your search criteria as follows:

   a. In the **Search** field, enter the desired search criteria. Refer to Section 6.1.2, "Search Guidelines" to find out how to formulate your search query to narrow the scope of your search.

   b. (Optional) In the **Search** field, click the **down-arrow** to render the "Search Type" drop-down box. Select the asset type to which you want to limit your search. If you do not make a selection, WebCenter Sites will search across all asset types in the current site.

3. Click the **magnifying glass** button.

> **Note:** In the Contributor interface, your search results are based on information drawn from a database index which is updated at regular intervals. After creating or editing an asset, there might be a short delay before those changes are reflected in the search results. If you have questions, consult your WebCenter Sites administrator.

   – If you are not currently working with any assets, WebCenter Sites displays the search results list in a "Search" tab.

Figure 6–1   'Search' Tab
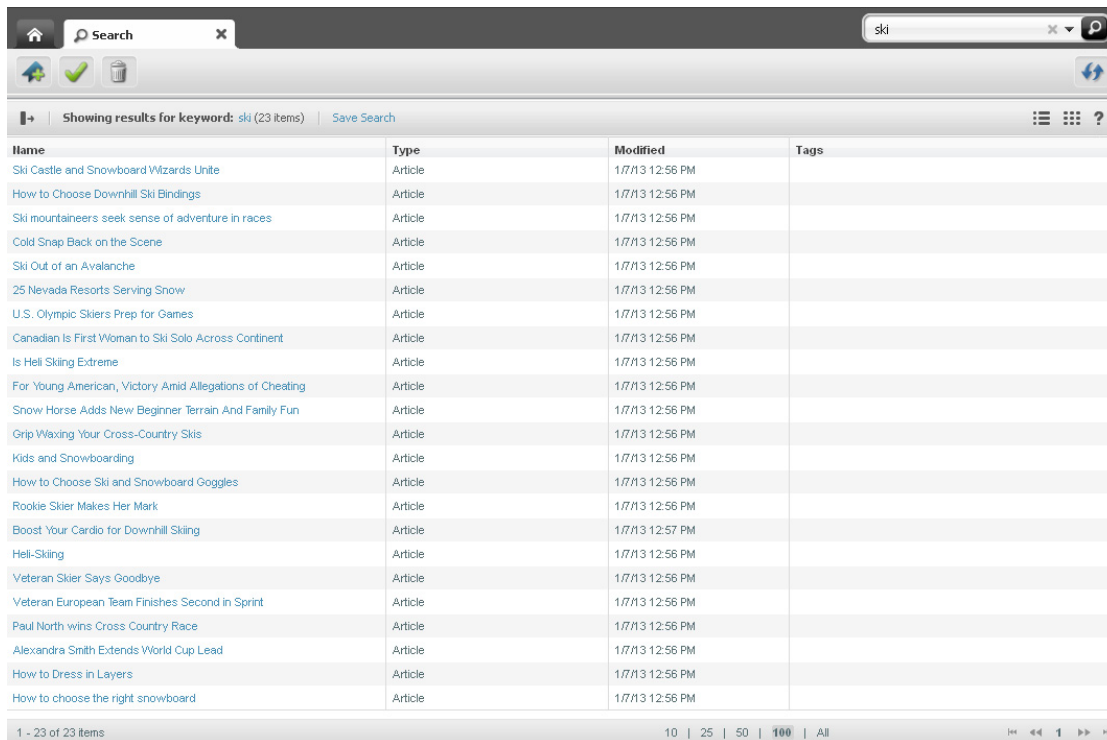
–   If you are working with an asset, the search results list is automatically docked to the right of the workspace.

Figure 6–2   Search Results Docked to the Right of an Asset
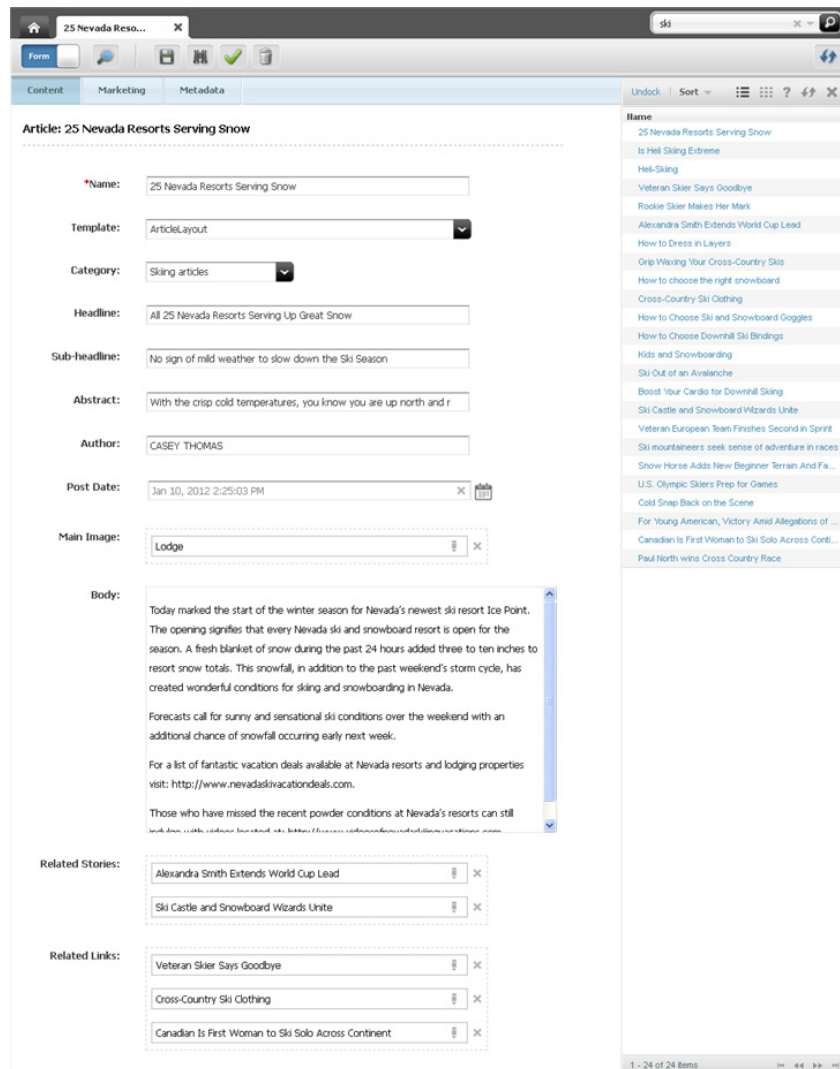
4. In the search results list, select the asset(s) you wish to work with. To more easily find specific assets within the search results list, you can navigate through the list, sort the results of your search, dock or undock the results list, and display each asset listed in the results list as thumbnail images.

   For instructions on working with search results list, see Section 6.4, "Working with the Search Results List."

6.3 Performing an Advanced Search

Advanced searches enable you to search for assets by creation date, start and end date, locale, unique identifier, name, description, author, and type – or any combination of these items.

To perform an advanced search for an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the **Search** field, select the **down-arrow** and then click **Advanced Search**.

The "Search" tab displays the "Advanced Search" screen.

Figure 6–3 'Advanced Search' Screen

3. In the "Advanced Search" screen, specify criteria in as many of the fields that follow as you need to narrow your search:

    a. In the "Find content that contains" section, specify how to match search conditions:

        a. In the text box, enter words or phrases for which to search. The same options described in Section 6.1.2, "Search Guidelines," may be used in this field.

        b. Specify conditions that the results of the search must match:

            To have your search results match *all* the search criteria you specify, select **All of these words** from the drop-down list.

            To have your search results match *any one* of the search criteria you specify, select **Any of these words** from the drop-down list.

    b. In the "And meets the following conditions" section, specify any other criteria that the results of the search must meet:

        – Search for assets whose names contain criteria specified in the **Name** field.

- Search for assets whose descriptions contain criteria specified in the **Description** field.

- Perform a tag-based query on assets that have been tagged with a specific word or phrase.

- Search for assets whose unique identifiers contain criteria specified in the **Id** field.

- If your company tracks multilingual content using Locales, you can limit your search to assets in a selected location by choosing an option from the **Locale** drop-down list. For more information about managing multilingual content and about the Locale field, see Section 11, "Working with Multilingual Assets".

- Search for assets created by a specific user by selecting the name of the desired content provider from the **Author** drop-down list.

- Search for a range of time in which assets were created by selecting a time from the **Modified** field. If you select **Custom Range**, enter the date you want to search from and to in the "From" and "To" fields.

- Search only assets of a particular type by selecting an item from the **Asset Type** drop down list. You may see one or both of the following fields depending on the configurations made to the Lucene search engine by your site administrator:

  If the asset type you chose has multiple subtypes associated with it, narrow your asset type search to a specific subtype, by specifying a subtype in the **Asset Subtype** field.

  If the site administrator configured the **Asset Type Search** and **Attributes for Asset Type Index** search in the WebCenter Sites Admin interface, you will see the "Enter search keyword for asset attributes" section. Limit a search to specific attributes of an asset type by selecting the attribute from the drop-down menu and clicking **Add**.

> **Note:** For information about configuring search features in the WebCenter Sites Admin interface, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

4. Click **Run Advanced Search** to perform a search using the criteria you specified. To reset the fields in the "Advanced Search" screen, click **Reset**.

   - If you are not currently working with any assets, WebCenter Sites displays the search results list in a "Search" tab.

   - If you are working with an asset, the search results list is automatically docked to the right of the workspace.

5. In the search results list, select the asset(s) you wish to work with. To more easily find specific assets within the search results list, you can navigate through the list, sort the results of your search, dock or undock the results list, and display each asset listed in the results list as thumbnail images.

   For instructions on working with search results list, see Section 6.4, "Working with the Search Results List."

6.4 Working with the Search Results List

After you run a search, the results of your search are displayed as a list in either a "Search" tab or docked to the right of your workspace. To more easily find specific assets within the search results list, you can navigate through the list (limiting the number of results that are shown at the same time), sort the results of your search in a number of ways, dock or undock the search results list, and display each asset listed in the search results as thumbnail images.

This section contains the following:

- Section 6.4.1, "Docking or Undocking the Search Results List"
- Section 6.4.2, "Switching Between List View and Thumbnail View"
- Section 6.4.3, "Sorting Your Search Results"
- Section 6.4.4, "Navigating Through Your Search Results"

6.4.1 Docking or Undocking the Search Results List

If are working with an asset while performing a search, your search results will automatically be docked to the right of your workspace. If you are not currently working on an asset when you perform a search, the results of your search will be displayed in a "Search" tab.

- To display the results of your search to the right of your workspace, in the toolbar displayed at the top of the search results, click **Dock**.

- To view the search results list in the "Search" tab, in the toolbar displayed at the top of the search results, click **Undock**.

6.4.2 Switching Between List View and Thumbnail View

Select whether you want to view your search results in List View or Thumbnail View.

Figure 6–4   Docked Search Results List Toolbar

- To display your search results as a list, click the **List View** option at the top of the search results list.

- To display each asset in your search results as a thumbnail image, click the **Thumbnail View** option at the top of the search results list.

6.4.3 Sorting Your Search Results

If your search results are displayed in the "Search" tab (undocked) in List View, sort your search results by clicking one of the columns:

- **Name**
- **Type**
- **Locale**
- **Modified**
- **Tags**

> **Note:** Once your results are sorted, click the same column again to reverse the sort order.

If the search results list is displayed to the right of the workspace (docked) or if the search results are displayed in the Thumbnail View, click the **Sort** option at the top of the search results list and select one of the following options (depending on how you want to sort the results):

- **Name (A – Z)**
- **Name (Z – A)**
- **Asset Type**
- **Locale**
- **Modified (Newest First)**
- **Modified (Oldest First)**

Your search results are listed in the order you specify.

6.4.4 Navigating Through Your Search Results

The search results list displays 100 assets per page of results. To easily navigate through the results of your search, you can:

- Limit the number of search results that are displayed in the list. At the bottom of the search results list, click **All** to display all search results in the list at the same time.

Figure 6–5 Filter for Limiting the Number of Results Listed
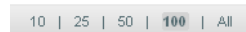
- Go to the next page of search results by clicking the **Next Page** icon at the bottom of the search results list.

Figure 6–6 'Next Page' Icon
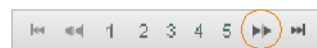
- Go back to the previous page of search results by clicking the **Previous Page** icon at the bottom of the search results list.

Figure 6–7 'Previous Page' Icon
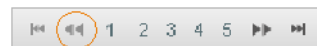
- Skip to the last page of search results by clicking the **Last Page** icon at the bottom of the search results list.

Figure 6–8 'Last Page' Icon
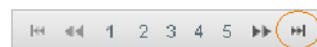
- Skip to the first page of search results by clicking the **First Page** icon at the bottom of the search results list.

Figure 6–9   'First Page' Icon

- Go to a specific page of results by selecting the desired page number, located at the bottom of the search results list.

Figure 6–10   Go to a Specific Page of Results
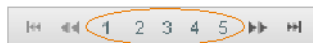
6.5 Saving Your Search Criteria

WebCenter Sites allows you to save your search criteria either as a Saved Search or as a ContentQuery asset. This section provides instructions for saving your search criteria both ways.

This section contains the following:

- Section 6.5.1, "Saving Your Search Criteria as a Saved Search"
- Section 6.5.2, "Saving Search Criteria as an Asset (of Type 'ContentQuery')"

6.5.1 Saving Your Search Criteria as a Saved Search

WebCenter Sites provides the **Saved Search** feature which allows you to save the search criteria you used to perform a search. The search criteria you save is accessible from the "Saved Searches" section of your dashboard (**Home** tab). A Saved Search can either be made public (shared with users assigned certain roles) or kept private (accessible only to the user who saved the search criteria) depending on how the search criteria is saved.

To save your search criteria as a Saved Search

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the **Search** field, enter the criteria you wish to search for. For more information about running a simple search, see Section 6.2, "Performing a Simple Search." If you want to perform an advanced search, see Section 6.3, "Performing an Advanced Search."

3. Click the **magnifying glass** button. If you are performing an advanced search, click **Run Advanced Search**.

   The search results list is displayed either in a tab named "Search" or docked to the right of your workspace.

4. Ensure the search results list is displayed in the "Search" tab. If the search results list is docked, click **Undock**.

5. Click **Save Search**.

   The following dialog is displayed:

Figure 6–11 'Save Search' Dialog Box
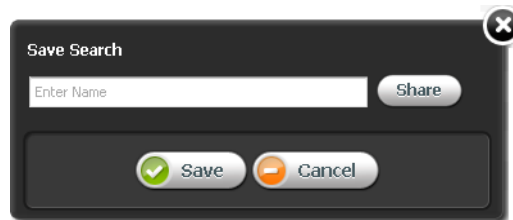
a. In the "Enter Name" field, enter a name to uniquely identify the search criteria you wish to save.

b. If you want to share this Saved Search with other WebCenter Sites users, click **Share**. In the "Available" list box, select the roles with which you wish to share this Saved Search and move them to the "Selected" list box.

Figure 6–12 'Save Search' –Share with Other Sites
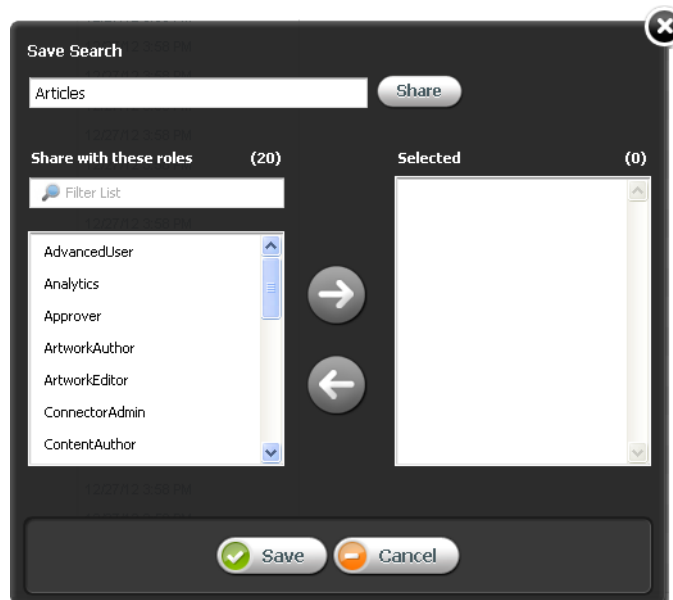
c. Click **Save**.

The saved search is displayed in the "Saved Searches" section of your dashboard (**Home** tab). If you shared the Saved Search, any users with the roles you specified will also see the Saved Search in their dashboards.

Figure 6–13   Dashboard – 'Saved Searches' Widget
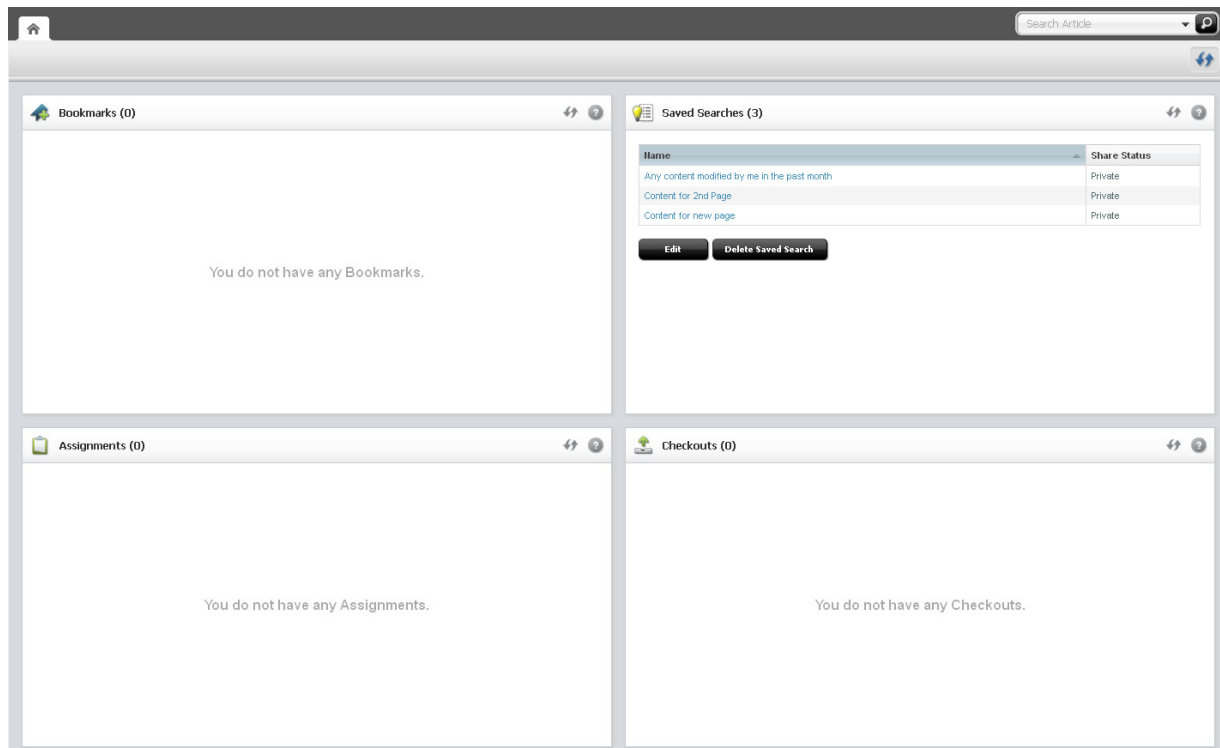
6. If you want to perform a search using the same search criteria you specified when you created the Saved Search:

   a. Access the dashboard by clicking the **Home** tab.

   b. In the "Saved Searches" section of the dashboard, select the Saved Search containing the criteria for which you wish to search.

      The "Search" tab opens displaying up-to-date results matching the saved search criteria.

6.5.2 Saving Search Criteria as an Asset (of Type 'ContentQuery')

WebCenter Sites provides a ContentQuery asset type, which combines the Advanced Search feature with the ability to save search criteria, thus enabling you to save your search criteria as an asset of type ContentQuery. A ContentQuery asset differs from other types of assets. It does not contain any content or a list of other assets. Instead, a ContentQuery asset contains only a query. When a ContentQuery asset is placed on a page and that page is published, the query executes and renders the results to site visitors.

To create a ContentQuery asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Create the ContentQuery asset. In the menu bar, select **Content**, then select **New**, and then select **New ContentQuery**.

> **Note:** If the administrator configured the ContentQuery asset type such that all new ContentQuery assets 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. For more information, see Chapter 16, "Workflow."

A tab opens displaying the asset's content entry form (Form Mode).

Figure 6–14   New ContentQuery Asset Form

3. In the ContentQuery asset's content entry form, do the following:

   a. Fill in the "Content" section:

      – In the **Name** field, enter a name for the ContentQuery asset.

      > **Note:** Naming conventions are the following:
      >
      > ■ The name must be between 1 and 64 alphanumeric characters.
      >
      > ■ The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), and greater-than sign (>).
      >
      > ■ The name can contain spaces, but cannot start with a space.

      – In the **Description** field, enter a brief description for the asset.

      – In the **List Size** field, enter the number of search results to be displayed by the ContentQuery asset. If you want the maximum number of results to be displayed to site visitors, leave this field blank.

      – In the **Sort Field** drop-down field, select the order in which the results of the query will be rendered. By default, you can sort the results by: **Name**, **Asset Type**, **Locale**, or the date the assets included in the results were last **Modified**.

– In the **Sort Order** drop-down field, select the order in which the query results will be displayed. The options are: **Ascending** and **Descending**.

b. Create a query. In the form section selector, click **Query**.

The "Query" section of the form opens displaying the "Advanced Search" form. Fill in the "Query" section with the search criteria you wish to save as an asset. For information about filling in the fields, see step 3 in Section 6.3, "Performing an Advanced Search."

4. Test the results of the query. In the "Query" section, click **Run Advanced Search**.

Note: You can test the results of the query from either the Edit view or Inspect view of the ContentQuery asset.

The results of the query are displayed (docked) to the right of the ContentQuery asset.

Figure 6–15 Query Results Displayed to the Right of the Asset
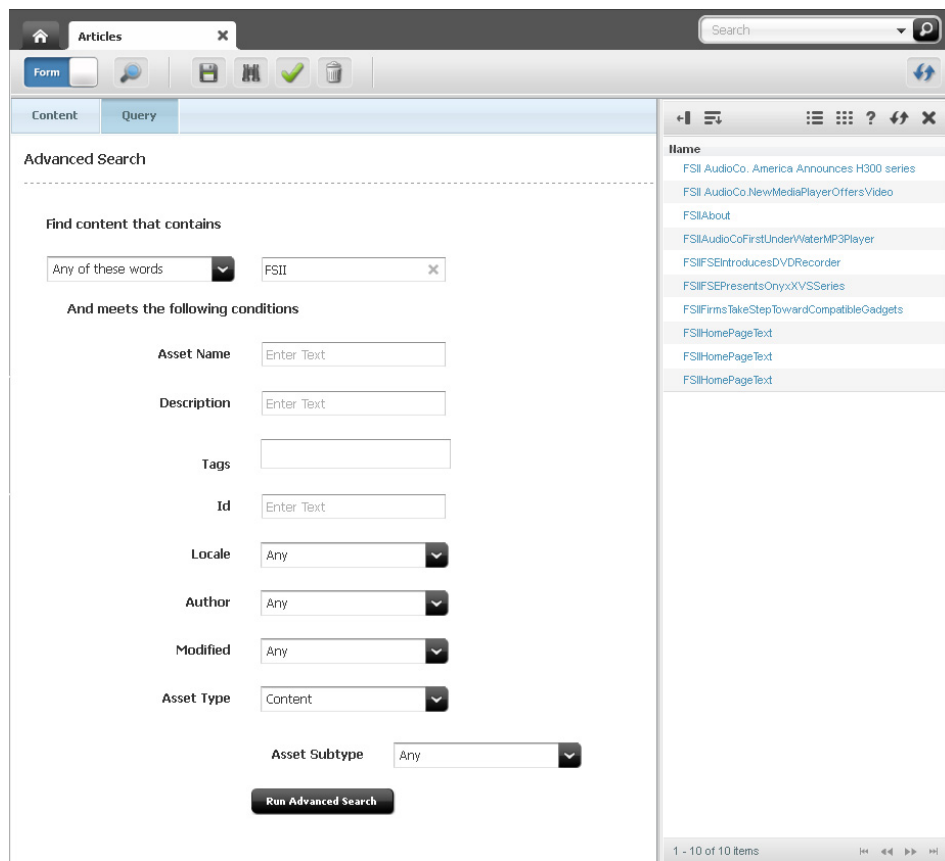
5. Save the asset by doing one of the following:

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

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

6. (Optional) Inspect the ContentQuery asset. In the asset's toolbar, click the **Inspect** icon.

7. To preview the results of the query:

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

   The "Select Layout" dialog box opens.

   b. In the "Select Layout" dialog box, select the desired layout and then click
   Apply. (By default, the `FSIIDetail` and `FSIISummary` templates of the FirstSite
   II sample site are both coded to render query results.)

   The tab displays a preview of the query results.

8. Place the ContentQuery asset on a page and then publish the page to the website.

   For instructions on placing an asset (ContentQuery asset in this example) into
   another asset's association field or slot, see Chapter 8, "Associating Assets." For
   instructions on publishing assets, see Chapter 14, "Approval for Publishing."

   When a site visitor accesses the web page, the ContentQuery asset executes its
   query and renders the results to site visitors.

6.6 Organizing Assets

WebCenter Sites allows you to organize assets and keep track of your workload to
help you easily find the assets you wish to work with.

This section contains the following information:

- Section 6.6.1, "Working with the 'My Work' Tree"
- Section 6.6.2, "Working with Tags"

6.6.1 Working with the 'My Work' Tree

WebCenter Sites allows you to keep track of your workload with the **My Work** tree
(located in the navigation pane). The **My Work** tree contains the **Bookmarks** and
History nodes, as follows:

Figure 6–16   'My Work' Tree
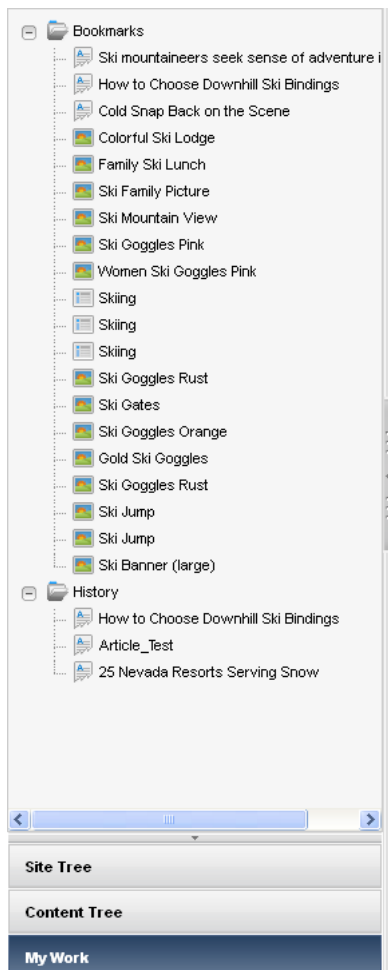
- ■ **Bookmarks** – returns a list of assets that you have bookmarked. Bookmarked assets are also listed in the "Bookmarks" section of the dashboard (located in the **Home** tab). For instructions about bookmarking assets, see Section 6.6.1.1, "Bookmarking Assets."

- ■ **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.

You cannot create, modify, or delete the nodes in the **My Work** tree. However, you can control which assets are added to the **Bookmarks** node. By adding assets to the **Bookmarks** node, you create a personalized list of assets that you can easily retrieve in the future. You can add and delete assets from the **Bookmarks** node at any time. On the other hand, the **History** node keeps track of the assets you work with in the current session. This allows you to refer back to these assets at any time during your session. When you expand a node (**Bookmarks** or **History**), the assets contained within that node are listed underneath. An asset can be included in both tree nodes at the same time.

> **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.

This section contains the following information:

- Section 6.6.1.1, "Bookmarking Assets"

- Section 6.6.1.2, "Accessing Bookmarked Assets"

- Section 6.6.1.3, "Unbookmarking Assets"

- Section 6.6.1.4, "Accessing Assets from the 'History' Node"

6.6.1.1 Bookmarking Assets

Bookmarking allows you to add select assets to the **Bookmarks** node in the **My Work** tree, which makes those assets easy to retrieve at a later time. Bookmarked assets are also listed in the "Bookmarks" section of your dashboard (located in the **Home** tab). You can bookmark an asset you are currently working with and bookmark multiple assets from a search results list.

To bookmark assets

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Perform a search, as described in Section 6.2, "Performing a Simple Search." If you wish to conduct an advanced search, see Section 6.3, "Performing an Advanced Search."

3. If the search results list is docked to the right of the workspace, click **Undock** to display the search results list in the "Search" tab.

4. Bookmark the desired asset(s). Do one of the following:

    – **To inspect the asset's content before you bookmark it:**

      a. In the search results list, navigate to and click the name of the desired asset.

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

      b. In the menu bar, select **Content**, then select **Bookmark**.

    – **To bookmark multiple assets directly in a search results list:**

      a. In the search results list, select (**Ctrl**+ click) the assets you want to bookmark.

      b. In the "Search" tab's toolbar, click the **Bookmark** icon.

        A message is displayed stating the number of bookmarks that were created. WebCenter Sites adds the selected asset(s) to the **Bookmarks** node (in the **My Work** tree) and the "Bookmarks" section of the dashboard (located in the **Home** tab).

5. Verify that the assets you selected have been added to the list of bookmarked assets. For instructions, see Section 6.6.1.2, "Accessing Bookmarked Assets."

6.6.1.2 Accessing Bookmarked Assets

Bookmarked assets can be accessed in the following ways:

- From the "Bookmarks" section of the dashboard (in the **Home** tab).

- From the **My Work** tree under the **Bookmarks** node.

To access bookmarked assets from the dashboard

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the **Home** tab, navigate to the "Bookmarks" section of the dashboard.

Figure 6–17   Dashboard – 'Bookmarks' Widget
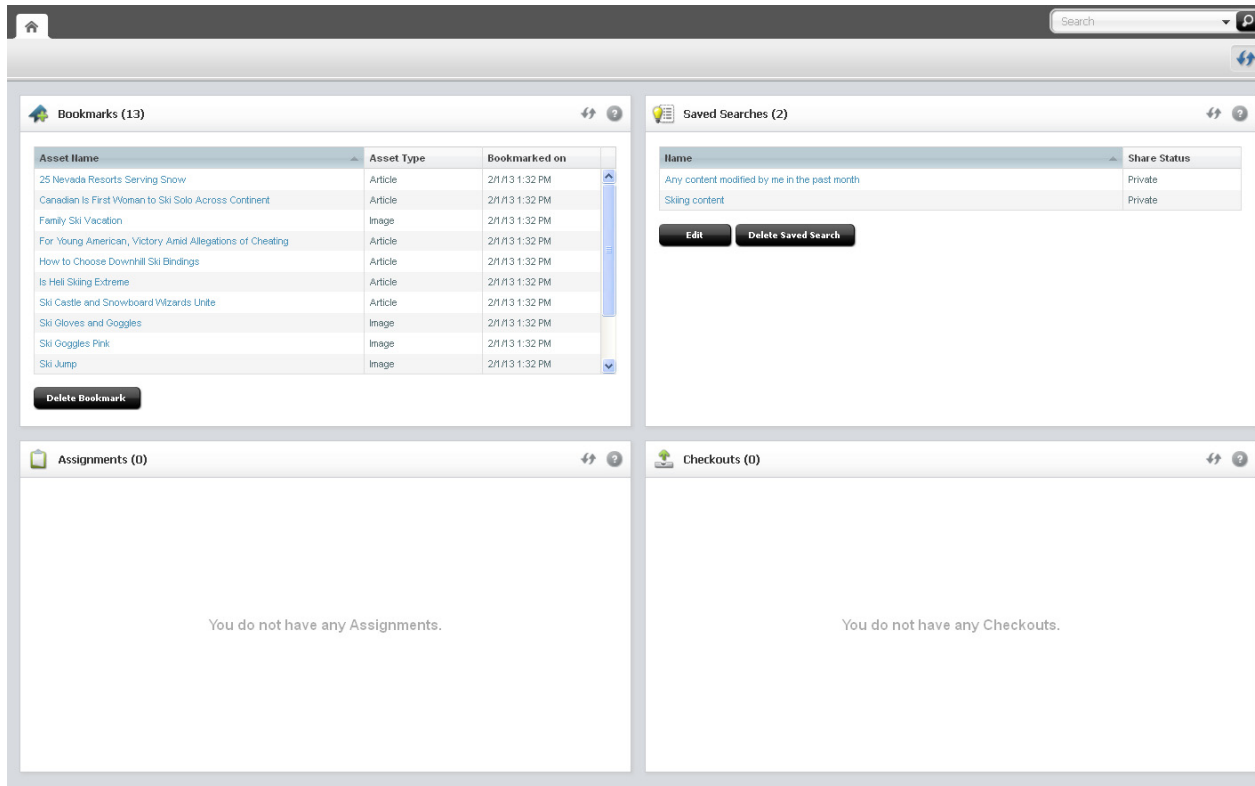
3. In the "Bookmarks" section of the dashboard, navigate to and click the name of the desired asset.

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode.

To access bookmarked assets from the 'My Work' tree

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **My Work** bar.

3. In the **My Work** tree, expand the **Bookmarks** node by clicking the plus-sign next to it.

   A list of bookmarked assets is displayed underneath the **Bookmarks** node.

4. Navigate to and double-click the desired asset.

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode.

6.6.1.3 Unbookmarking Assets

If you no longer want an asset to be bookmarked, you can remove the asset from the bookmarked assets list. When you unbookmark an asset, the asset is removed from the **Bookmarks** node in the **My Work** tree and from the "Bookmarks" section of your dashboard.

To unbookmark assets from the 'My Work' tree

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, if the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.

3. In the **My Work** tree, expand the **Bookmarks** node by clicking the plus-sign.

   A list of bookmarked assets is displayed underneath the **Bookmarks** node.

4. In the list of bookmarked assets, double-click the asset you wish to unbookmark.

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

5. In the menu bar, select **Content**, then select **Unbookmark**.

   A message is displayed under the asset's toolbar stating that the bookmark was successfully removed. WebCenter Sites removes the asset from the **Bookmarks** node in the **My Work** tree and from the "Bookmarks" section of the dashboard (in the **Home** tab).

To unbookmark assets from the dashboard

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Access the dashboard by clicking the **Home** tab.

3. Navigate to the "Bookmarks" section of the dashboard.

Figure 6–18 Dashboard – 'Bookmarks' Widget
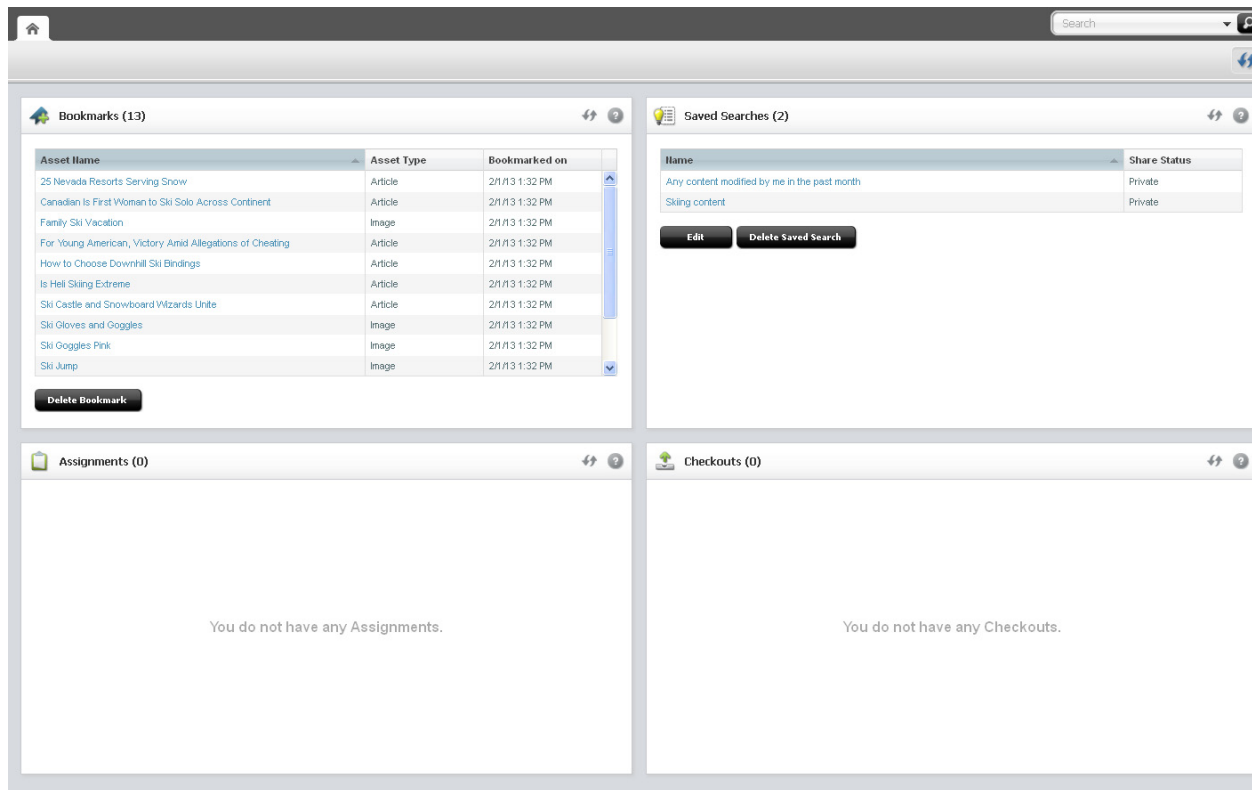
4. In the list of bookmarked assets, select the row containing the asset you wish to remove from the list of bookmarked assets.

5. Click **Delete Bookmark**.

    A pop-up window opens displaying the following message:

Figure 6–19   Delete Bookmark Dialog Box
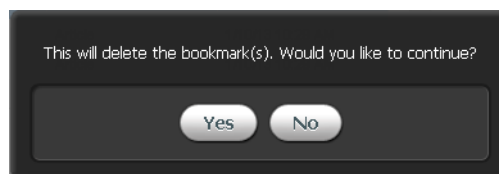
6. Click **Yes**.

    WebCenter Sites removes the asset from the "Bookmarks" section of the dashboard and from the **Bookmarks** node in the **My Work** tree.

6.6.1.4 Accessing Assets from the 'History' Node

The **History** node, in the **My Work** tree, keeps track of all the assets you have worked with in the current session, which allows you to quickly refer back to those assets during the session.

> **Note:** Assets cannot be manually removed from the **History** node. Instead, the list of assets contained within the **History** node is cleared every time you log out of WebCenter Sites.

To access assets from the History node

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **My Work** bar.

3. In the **My Work** tree, expand the **History** node by clicking the plus-sign.

4. In the **History** node, navigate to and double-click the desired asset.

Figure 6–20   History Node on the 'My Work' Tree
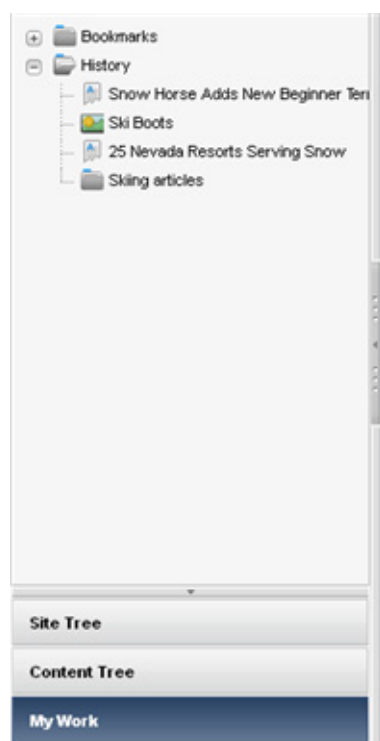
A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode.

6.6.2 Working with Tags

WebCenter Sites allows you to organize assets by adding tags to them. A **Tag** is a single word or short phrase that you apply to assets that share one or more common factors (for example, a theme or topic). When an asset is tagged, you can conduct an advanced search to find all the assets that have been tagged with the same content.

Tags can be added to basic assets, flex assets, and page assets. You can add a tag to an asset either from the asset's content entry form or from a search results list. This section shows you how to tag assets from a search results list. For instructions on adding tags to an asset directly in the asset's content entry form, see step 4c in Section 3.1.2, "Creating a New Asset in Form Mode."

To tag assets from a search results list

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Perform a search, as described in Section 6.2, "Performing a Simple Search." If you wish to conduct an advanced search, see Section 6.3, "Performing an Advanced Search."

3. Ensure that the search results are displayed in the "Search" tab. If the search results list is docked to the right of your workspace, click **Undock**.

4. In the search results list, select (**Ctrl**+click) the asset(s) you wish to tag.

5. Right-click one of the assets you selected.

   A context-menu opens:

Figure 6–21   Asset's Context Menu in Search Results List
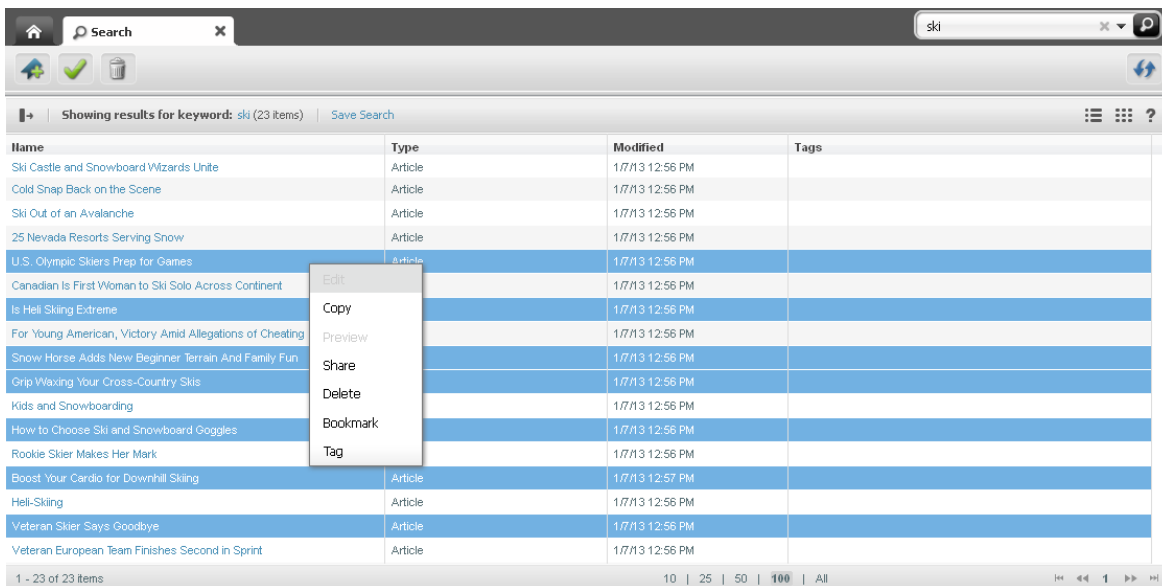
6. In the context-menu, click **Tag**.

   The following dialog box opens:

Figure 6–22   Add Tag Dialog Box
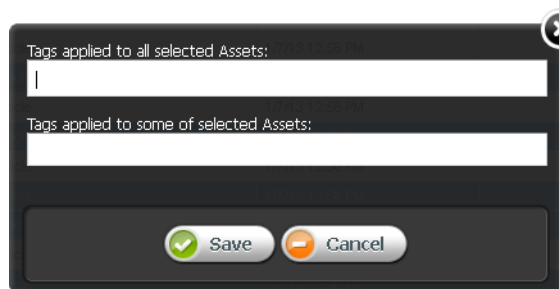
7. In the **Tags applied to all selected Assets** field, enter a single word or short phrase to attach to the selected assets.

   Note the following conventions when adding tags to assets:

■ A tag must be between 1 and 32 alphanumeric characters. The only other characters allowed are: underscore (_) and hyphen (-).

■ To end a tag, use the semicolon (;) or press enter on your keyboard. For example, if you want to enter multiple tags into this field, each tag must be separated by a semicolon (;).

> **Note:** If some of the selected assets have already been tagged, those tags will be displayed in the **Tags applied to some selected Assets** field.

8. (Optional) If you wish to remove a tag that some of the assets you selected are tagged with, in the **Tags applied to some selected Assets** field, navigate to the tag you wish to remove and click the **X** button.

9. Click **Save**.

10. In the search results list toolbar, click the **Refresh** icon.

   The tags you added to the selected assets are displayed in the **Tags** column of the search results list.

Figure 6–23 Tags Displayed in the 'Tag' Column of the Search Results List

7

Previewing Assets

This chapter describes how to use the *Preview* function to preview assets as they will be displayed on the website once they are published. Since websites change from moment to moment and day to day, WebCenter Sites offers the *Future Preview* feature. *Future Preview* enables you to view site assets as they will be displayed on the website at any particular moment in the future. This chapter is illustrated with examples from the FirstSite II sample site.

This chapter contains the following sections:

- Section 7.1, "Overview"
- Section 7.2, "How Do I Preview Assets?"
- Section 7.3, "Previewing Future Sites"

7.1 Overview

The Contributor interface allows you to preview how an asset will be displayed on the website once it is published (as shown in Figure 7–1). When you preview an asset, you cannot modify its content. However, you can choose to preview how the asset would look if it were rendered by a different template or wrapper.

Figure 7–1   Preview of the FirstSite II Sample Site's FSIIAbout Asset
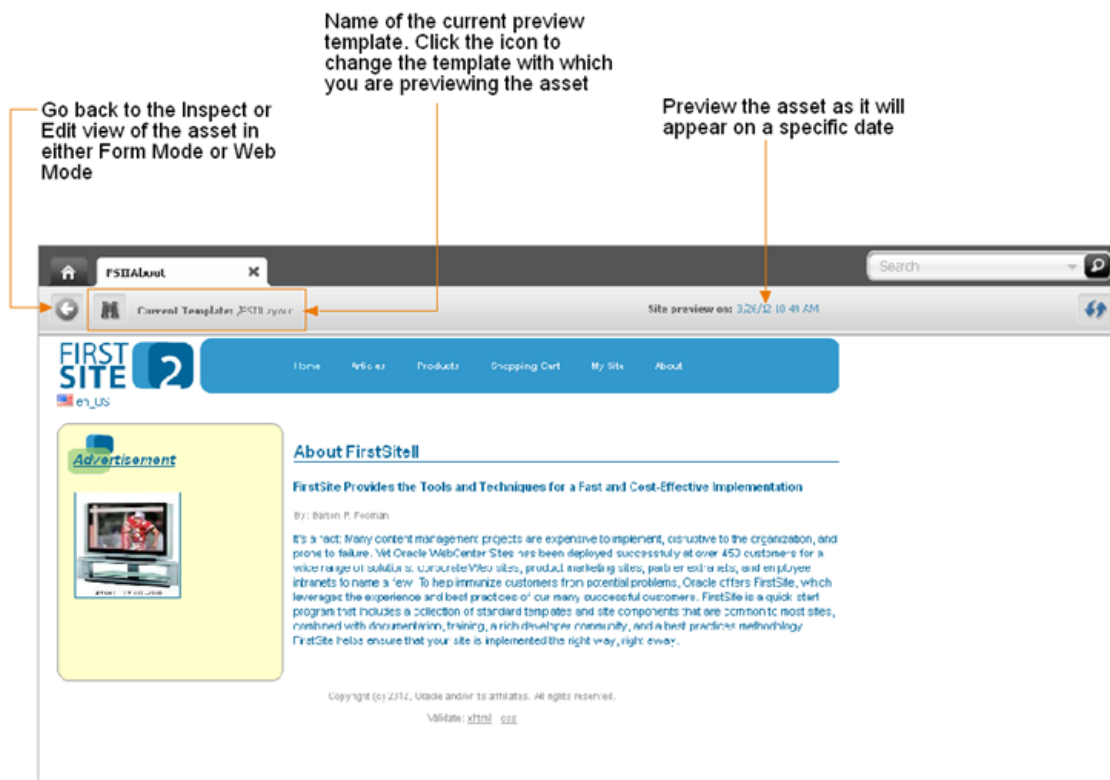
While previewing an asset, you can choose to preview how the asset will look on the website at a future date. This feature is called *Future Preview* and is discussed later in this chapter. Future preview combines the use of start and end dates (also discussed later in this chapter) with the preview feature to show how an asset will be displayed on the website at a given time and date in the future.

7.2 How Do I Preview Assets?

Previewing an asset renders the asset as it would be displayed on the website if it were published. To preview an asset, the following conditions must be satisfied:

- You must have the appropriate permissions.

- The asset must have a template assigned to it.

You can preview an asset in several ways. For example:

- Use the **Search** field in the Contributor interface to find the desired asset. You can either open the asset and then preview it or preview the asset directly from the search results list.

- Drill down the **Site Tree** or **My Work** tree in the navigation pane. You can either right-click the desired asset and preview it directly from the tree or open the desired asset in its Inspect or Edit view and then preview it.

- Drill down the **Content Tree** and double-click the parent asset associated with the asset you wish to preview. In the "Browse" tab that lists the assets associated with the selected parent asset, navigate to and preview the desired asset.

- Preview an asset you are currently working with.

> **Note:** This chapter shows you how to preview an asset by using the **Search** field in the WebCenter Sites Contributor interface.

**To preview an asset**

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to preview. Do the following:

   a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

   For more information about searching for assets, see Section 6.1, "Overview of Finding Assets."

   b. In the list of search results, navigate to and click the desired asset's name.

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

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

   The tab displays the preview of the asset.

Figure 7–2   Preview of an Asset
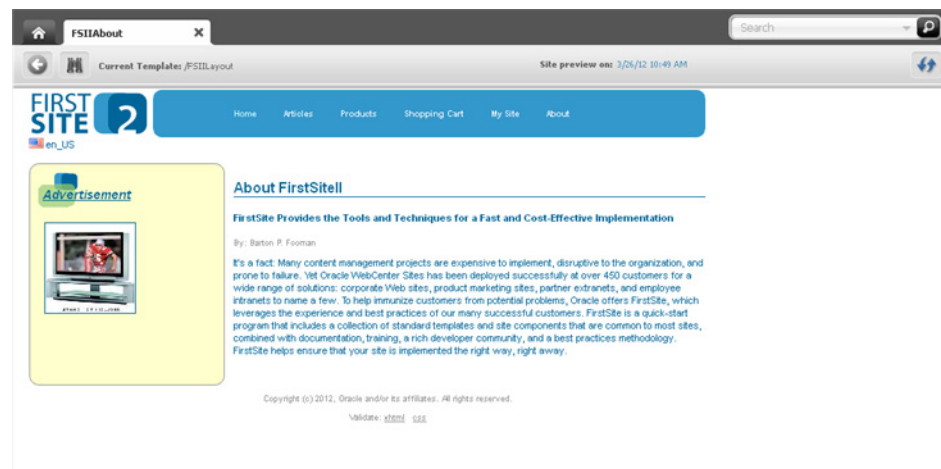
4. Preview how the asset would look on the website if it were rendered by a different template.

   a. Do one of the following:

   – In the asset's toolbar, click the **Preview with Page Layout** icon.

   – In the menu bar, select **View**, then select **Preview with Page Layout**.

   The "Select preview template" dialog box is displayed.

Figure 7–3   'Select Preview Template' Dialog Box
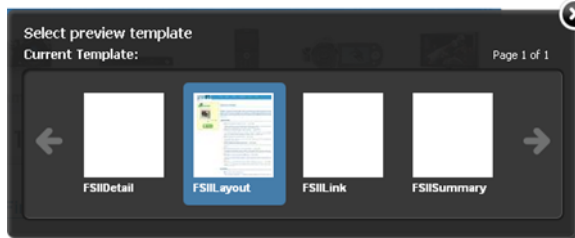
b. Select the template with which you wish to preview the asset. (In this example, we selected the `/FSIIDetail` template, which renders the content of the asset without a surrounding layout).

c. Click **Apply**.

The asset is displayed in the tab as it would be displayed on the website if it were rendered by the template you selected. For example:

Figure 7–4   Asset Previewed with a Different Template
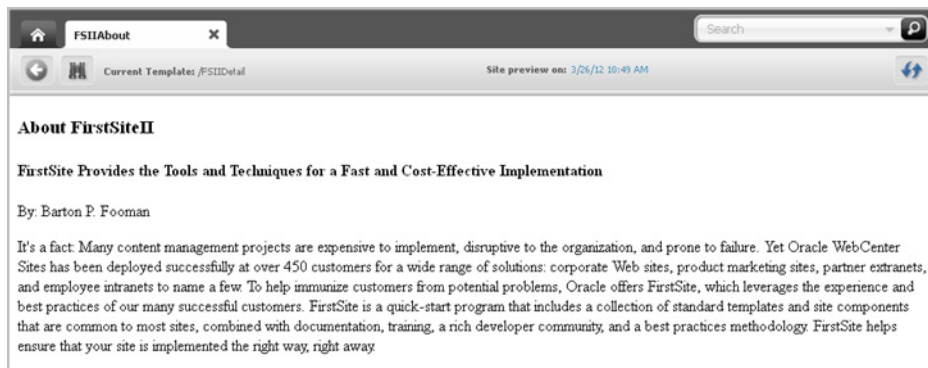
5. Preview the asset with segments:

a. In the menu bar, select the **Preview with Segments** icon.

A drop-down menu is displayed listing the available segments.

Figure 7–5   'Preview with Segments' Icon
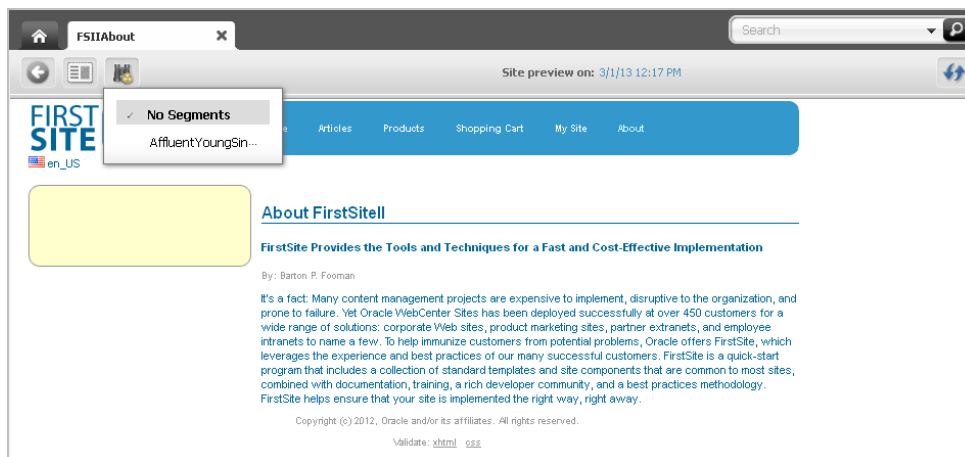
    b. In the drop-down menu, select the segment with which you wish to preview the asset.

       The preview of the asset with the selected segment is displayed in the tab. For information about segments, see Chapter 18, "Grouping Visitors into Segments with Engage."

6. Preview the asset with a different site wrapper. In the menu bar, select **View**, then select **Preview with Wrapper**, and then *select the wrapper with which you wish to preview the asset*.

    The preview of the asset is displayed in the tab with the wrapper you selected.

Figure 7–6   Preview Asset with a Different Wrapper
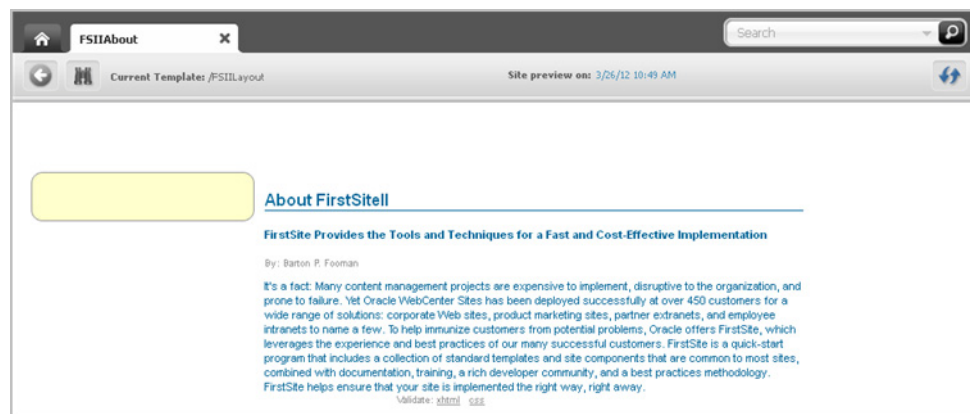
7. Preview the asset in a new window. In the menu bar, select **View**, then select **Preview in New Window**.

    A new browser window opens displaying the preview of the asset.

Figure 7–7   Preview Asset in a New Window
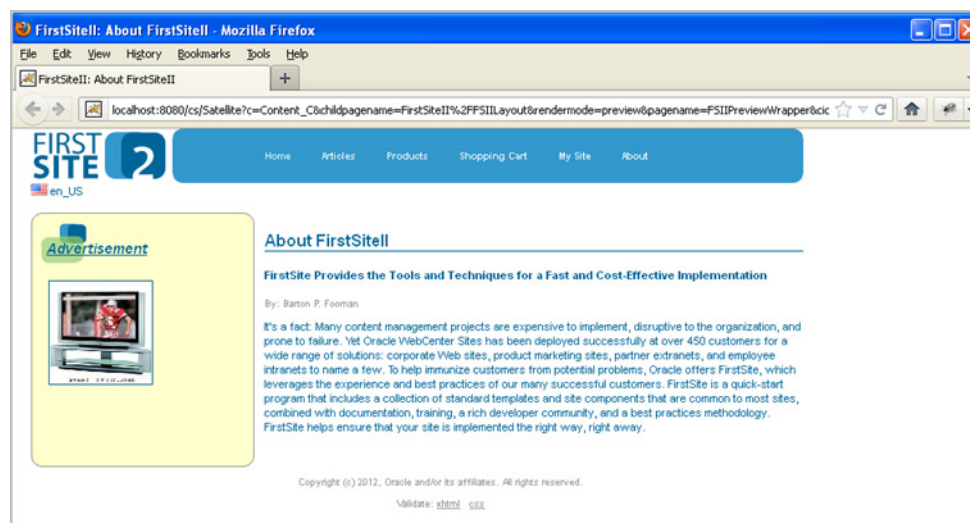
7.3 Previewing Future Sites

While you are planning upcoming changes to a website, you can assign start and end dates to an asset. Once start and end dates are assigned, you can preview site assets as

they will be displayed on a site at different times in the future. The feature you use to generate future versions of the website is known as "Future Preview."

Start and end dates are a key part of Future Preview, which is an enhanced function of Site Preview. You can preview how an asset will appear without setting start and end dates (the regular Site Preview), but by assigning a start and end date range to an asset, you gain the ability to visualize upcoming changes to the website. Once you assign a start and/or end date to an asset, you can see how the asset will change over time by selecting dates from the date picker on an asset's toolbar when its preview is displayed.

This section contains the following:

- Section 7.3.1, "About Start and End Dates"
- Section 7.3.2, "About Future Preview"
- Section 7.3.3, "Impact of Start and End Dates on Future Preview"
- Section 7.3.4, "Assigning Start and End Dates"
- Section 7.3.5, "Previewing a Site as It Will Appear at a Future Time"
- Section 7.3.6, "Approval for Publishing"

7.3.1 About Start and End Dates

Start and end dates are optional field values you can assign to assets. This date range indicates when assets will appear on a website, should they be published. Fill in these dates when you are working with an asset in Form Mode (located on the **Metadata** tab).

Start and end dates affect the function of Future Preview, as discussed in this chapter.

Start and end dates also appear in the "Advanced Search" options, giving you the ability to search for assets based on the date range in which they will appear on the website.

7.3.2 About Future Preview

Future Preview is a tool for visualizing your website as you strategize upcoming content changes. With Future Preview, you can preview an asset's web page as it will appear at any selected moment in the future. By generating possible versions of a web page, you can more easily decide what to publish and when.

With Future Preview, you can select any particular date in the future and see what all the changes you and other content contributors are making will look like on the website at that time. WebCenter Sites uses the assigned start and end dates to determine whether to display the preview of the asset. The asset's preview is displayed only when the selected date falls within the asset's start/end date range.

> **Note:** To preview an asset as it will appear at future dates:
>
> - Start and end dates must be assigned in the **Metadata** section of an asset's content entry form (in Form Mode).
> - The template for the page in which the asset appears must contain the `asset:filterassetsbydate` tag. See your site administrator for further information.

7.3.3 Impact of Start and End Dates on Future Preview

You will need to consider the following factors when assigning start and end dates:

- The start and end date range are the times you expect the asset to be displayed on the website.

  Once you set a start and end date range, you can use Future Preview to compare how the page on which the asset appears will look on dates before, during, and after the date range.

  When you first preview an asset, you see its web page as it would appear on the asset's start date. If no start date is assigned, the current date is used for preview.

  Choose a future date from the date picker in the asset's toolbar to view how the page will appear at the selected time. When you select a date that falls during the asset's start and end date range, the preview shows how the asset's web page will look during the period the asset is visible on the website. Conversely, if you choose a date that falls outside that date range, you see the asset's web page as it will appear before the item is published or after the item is no longer visible on the page.

  > **Note:** The publication date of the asset does not affect when and how long the asset displays on the website; this is controlled by the start and end dates.

- Neither the start nor end date is a required field:

  - An asset without both start and end dates is always displayed in the Site Preview, regardless of the date with which you choose to preview it.

  - An asset with an explicitly set start and end date is displayed conditionally; that is:

    - If the asset has both a start and an end date, it is displayed only when the specific date range is selected.

    - If the asset has only a start date, the asset is displayed on all dates including and after the start date. (It never expires.)

    - If the asset has only an end date, the asset is displayed on all dates up to and including the end date.

7.3.4 Assigning Start and End Dates

Start and end dates are optional fields you can assign to assets. This date range indicates when assets will be displayed on the website and how those assets will be displayed at any given time.

To assign a date range to an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the asset to which you are assigning a start and/or end date. Do one of the following:

   - In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

–   If you are modifying an asset that has previously been assigned a start and/or end date, you can search by the previously assigned dates using the "Advanced Search" function. For more information about Advanced Search, see Section 6.3, "Performing an Advanced Search."

–   If you previously bookmarked the asset, expand the **Bookmarks** node in the **My Work** tree in the navigation pane. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

3. Edit the asset in Form Mode.

    a. In the list of assets, navigate to the desired asset, right-click it, and select **Edit** from the context menu.

        The tab displays the asset's Edit view in either Form Mode or Web Mode.

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

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

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

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

Figure 7–8   'Metadata' Section of an Asset's Form
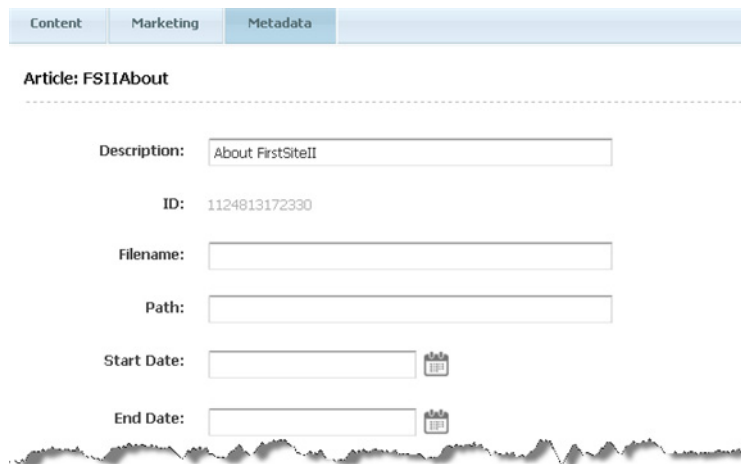
> **Note:**   Your administrator may have selected default start and end dates for this asset type. You can change the settings if you wish.

For more information about using the date picker, see Section 3.5.4, "Working with the Date Picker."

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

7. To preview the asset as it will appear at a future time, see Section 7.3.5, "Previewing a Site as It Will Appear at a Future Time."

7.3.5 Previewing a Site as It Will Appear at a Future Time

When assets have been assigned start and/or end dates, you can preview assets and the pages on which those assets are displayed as they will appear at future times of your choice.

Note: To preview an asset as it will appear at future dates:

■ Start and end dates must be assigned in the **Metadata** section of an asset's content entry form.

■ The template for the page in which the asset appears must contain the `asset:filterassetsbydate` tag. See your site administrator for further information.

To preview a site as it will appear at a future time

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find an asset to which you have assigned a start and/or end date. Do one of the following:

   – In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

   – To search for assets by their start and/or end dates, use the "Advanced Search" function. For more information about Advanced Search, see Section 6.3, "Performing an Advanced Search."

   – If you have previously bookmarked the asset, expand the **Bookmarks** node in the **My Work** tree in the navigation pane. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

   For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

3. In the list of assets, click the name of the desired asset.

   A tab opens displaying the Inspect view of the asset in either Form Mode or Web Mode.

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

   The tab displays the preview of the asset as it appears (or would appear) on the website on the current date.

5. Preview the asset as it will appear on a future date:

   a. In the asset's toolbar, click the date link in the "Site preview on" section to render the date picker.

Figure 7–9   Date Picker Rendered in an Asset's Preview
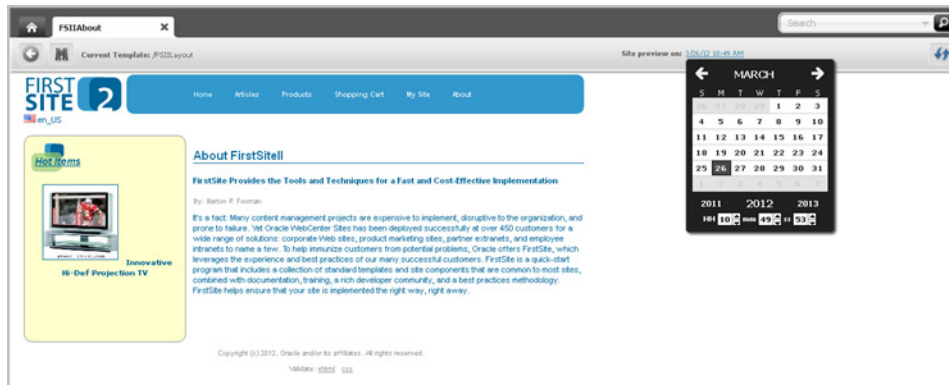
b. In the date picker, select the desired date and time. For instructions on using the date picker, see Section 3.5.4, "Working with the Date Picker".

The preview displays the asset's web page as it will appear on the selected date.

For example, if you preview the "FSIIAbout" asset's web page on a date in October, the screen in Figure 7–10 is displayed:

Figure 7–10   Future Preview of an Asset as it will be Displayed in October
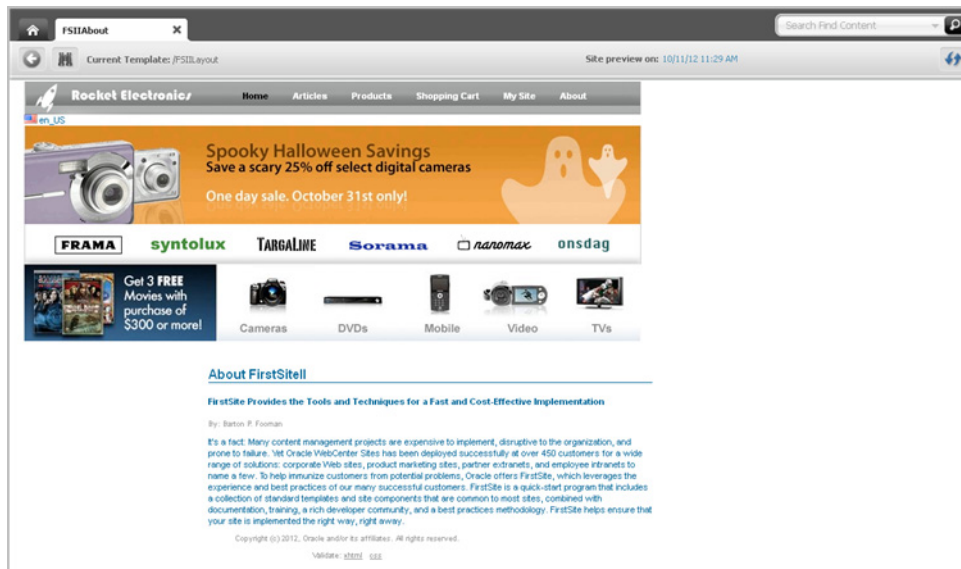
If you preview the same asset on a date in December, the screen in Figure 7–11 is displayed:

Figure 7–11   Future Preview of an Asset as it will be Displayed in December
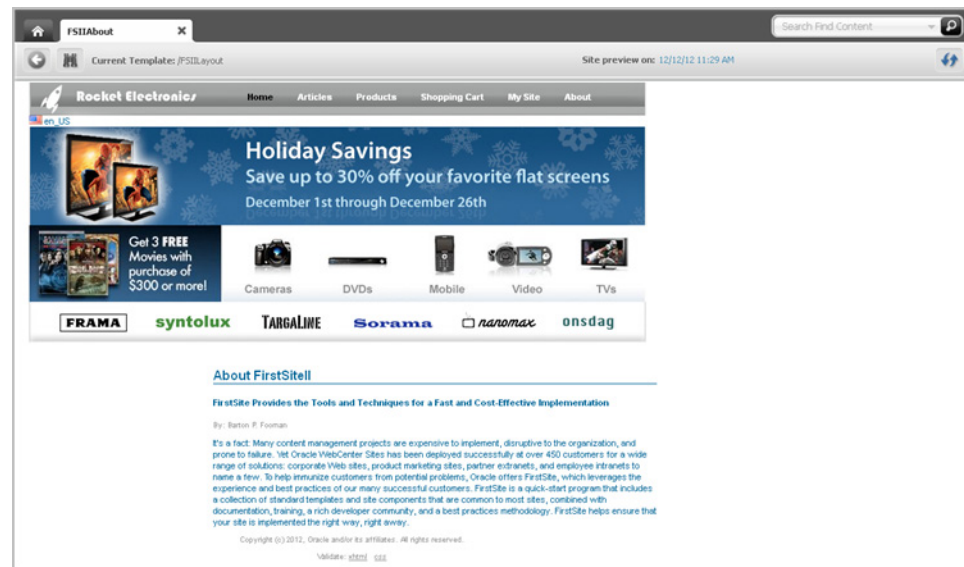
7.3.6 Approval for Publishing

Before an asset is published to a website, you must approve the asset and all of its dependents for publishing. This process ensures that all the assets published at the same time are up to date prior to publishing.

The start date that you set does not necessarily have to be the date on which the item gets published. However, the asset will not display on the website until its start date. This is true for all the dependent assets that you are approving as well.

If you publish an asset after its end date, the asset will be published to its destination; however, the asset will not appear on the website (the asset has expired).

For more information on approving assets, see Chapter 14, "Approval for Publishing."

8

Associating Assets

WebCenter Sites allows users to associate assets with one another. This chapter uses the avisports sample site to show you how to associate assets when you are working in the Contributor interface.

This chapter contains the following sections:

- Section 8.1, "Working with Asset Associations"
- Section 8.2, "Parent-Child Relationships"
- Section 8.3, "Working with Grouped Assets"

8.1 Working with Asset Associations

Some asset Create and Edit views include fields (Form Mode) or slots (Web Mode) where you link another asset to the one in which you are working. These types of fields are called "associations." Figure 8–1 shows an "Article" asset (from the avisports sample site), displayed in Form Mode and Web Mode, which is associated with five other "Article" assets.

Figure 8–1   Association Field Displayed in Form Mode and Web Mode

Article asset displayed in Form Mode   Article asset displayed in Web Mode
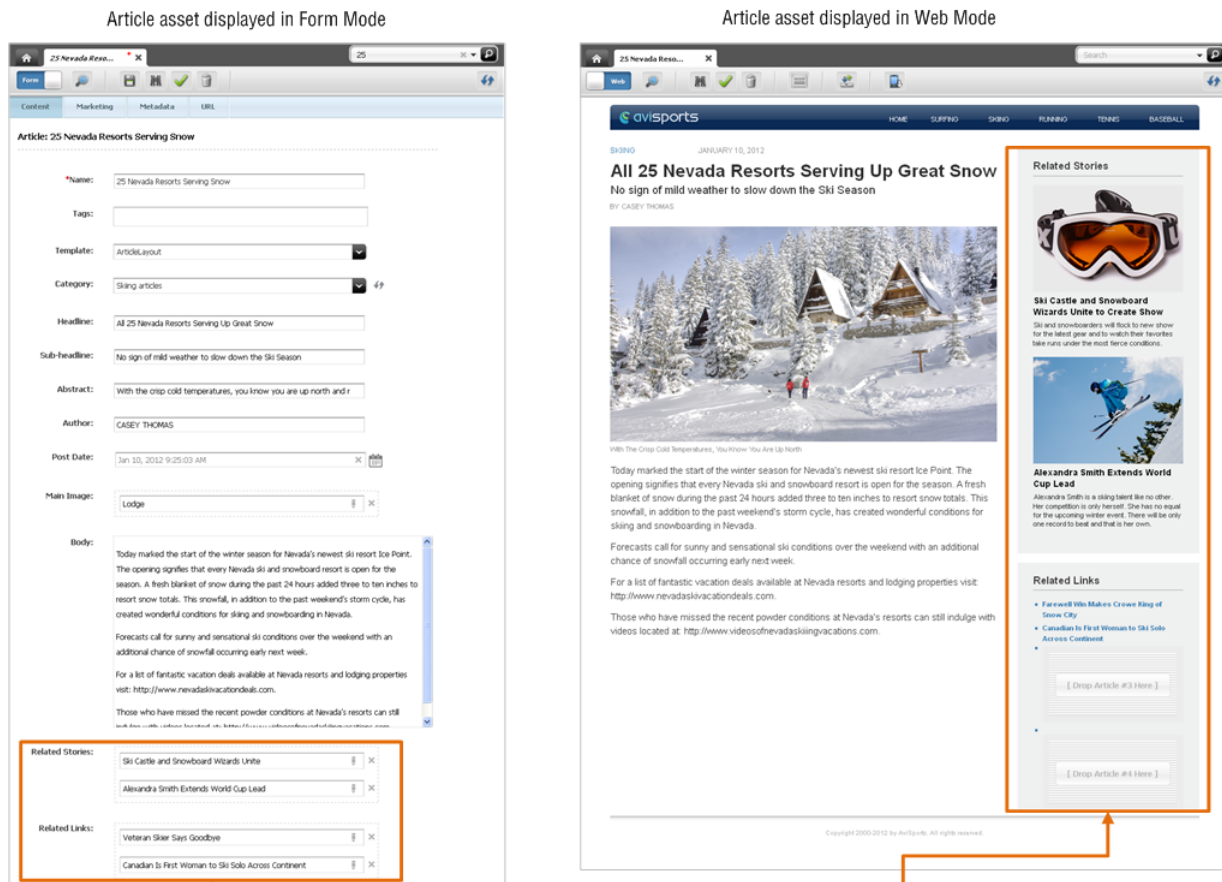
In Form Mode, the assets associated with the Article asset are listed in a field.

In Web Mode, the assets associated with the Article asset are displayed in slots.

An association field can be used to create relationships between assets. When you associate one asset with another asset you define a dependency between those assets. When one asset is dependent on another, both assets must be published together.

For example, suppose an asset of type "Article" has an association field that accepts an "Image" asset. In this case, you might associate an article about baseball with a picture of a baseball field. By associating the "Image" asset with the "Article" asset, you are indicating which image appropriately illustrates the article text. The "Article" asset and its associated "Image" asset are now dependent on one another. If you publish the "Article" asset, you must also publish the "Image" asset.

Which assets can be associated is determined by the data model. *How* associations will be presented on the website is determined by content rendering templates. For example, a template can either display an associated asset or render it as a link.

8.1.1 Types of Associations

An association field allows you to do one of the following, depending on how it is set up:

- **Single-valued association** field allows you to associate a single asset with the asset you are working with. For example, in the avisports sample site, assets of type "Article" contain a single-valued association field you can use to pair an "Article" asset with a single "Image" asset.

■ **Mulit-valued association** fields allow you to associate multiple assets with the asset you are working with. For example, in the avisports sample site, assets of type "Article" contain two multi-valued association fields that allow you to associate several different assets of type "Article" with the "Article" asset you are working with.

Depending on your site design, an association field may be restricted to accept either a specific type and/or sub-type of asset or it may be unrestricted, accepting different types of assets.

8.1.2 Associating Assets

This procedure uses the avisports sample site to show you how to associate one or more assets with another asset using either Form Mode or Web Mode. In Form Mode, an association field is displayed as a drag and drop field in a content entry form. In Web Mode, association fields are represented by slots that are displayed on the web page view of the asset with which you are working. This procedure covers both single and multi-valued associations.

To associate an asset with another asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Do one of the following:

   – Begin creating an asset:

      – For instructions on creating assets in Form Mode, see Section 3.1, "Creating Assets in Form Mode."

      – For instructions on creating assets in Web Mode, see Section 4.2.3, "Creating a New Asset in Web Mode."

   – Open an existing asset for editing:

      – For instructions on editing assets in Form Mode, see Section 3.3, "Editing Assets in Form Mode."

      – For instructions on editing assets in Web Mode, see Section 4.4, "Editing Assets in Web Mode."

   A tab opens displaying the asset's Create or Edit view in either Form Mode or Web Mode. (In this example, we open the **25 Nevada Resorts Serving Snow** "Article" asset.)

3. Find the asset(s) you wish to associate:

   a. In the **Search** field, enter the desired search criteria.

   b. If the association field accepts only assets of a specific type, limit your search to the required asset type by clicking the down-arrow in the **Search** field and selecting the name of the asset type.

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

      The search results list is docked to the right of the asset with which you are working. Below shows the Edit view of the **25 Nevada Resorts Serving Snow** "Article" asset in Form Mode and Web Mode with the search results list docked to the right of the asset.

Figure 8–2 'Article' Asset Displayed in Form Mode and Web Mode (with a Docked Search Results List)

In the Create or Edit view of an asset in Form Mode, you will see association fields that accept a single asset and/or multiple assets:
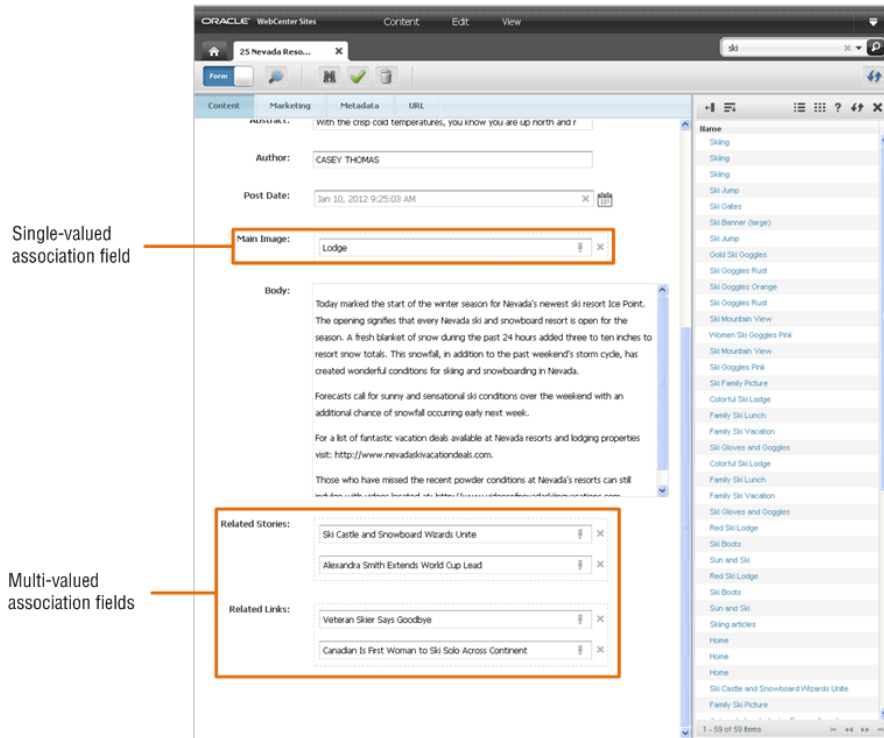
In the Create or Edit view of an asset in Web Mode, you will see empty and/or occupied slots that accept a single asset and/or multiple assets:
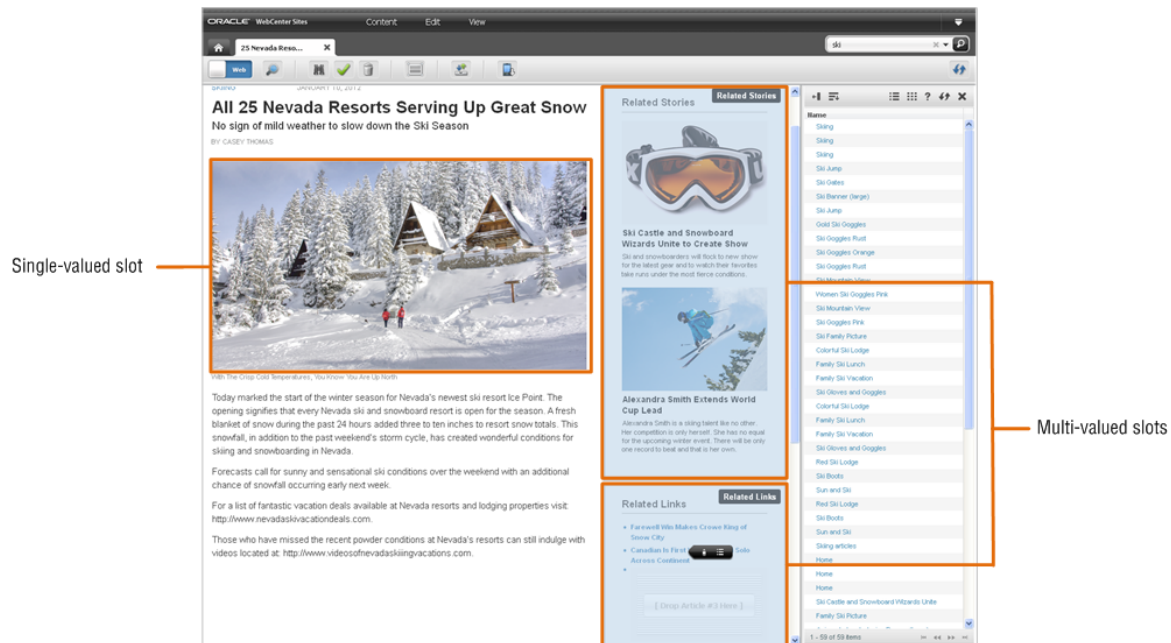
4. Associate the desired asset(s) with the asset you are working with:

> **a.** In the list of assets (docked to the right of the asset you are working with), click the name of the desired asset and drag the asset to the association field (Form Mode) or slot (Web Mode).
>
> **b.** Drop the asset into the association field (or slot) by releasing the mouse button.
>
> **c.** If you are working with a multi-valued association, repeat steps a – b, until you have associated all of the desired assets with the asset you are working with.
>
> The selected assets are added to the association field.

5. (Optional) If you are working with a multi-valued association and have associated two or more assets, arrange the associated assets as follows:

Note: The order in which the assets appear in the list (Form Mode) or in the slots (Web Mode), is the order they will display on the website.

- **If you are working in Form Mode**, move an asset up or down in the list by clicking the name of the desired asset and dragging and dropping it into the appropriate position in the field.

- **If you are working in Web Mode**, move an asset to a different slot. Do the following:

  > **a.** Click in the multi-valued slot.
  >
  > The slot's toolbar is displayed.
  >
  > **b.** In the slot's toolbar, click the **Manage** icon.
  >
  > The "Manage Slot Content" dialog box is displayed:

Figure 8–3 'Manage Slot Content' Dialog Box
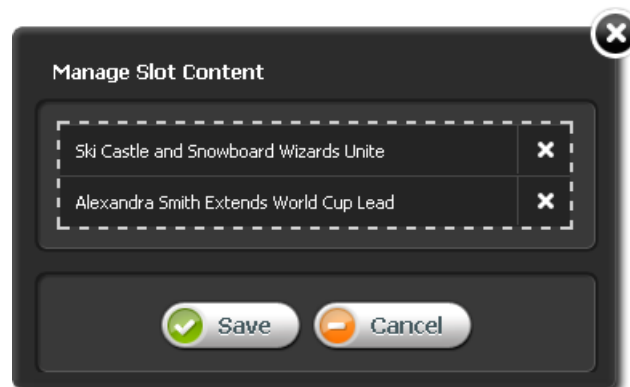
  > **c.** Click the name of the desired asset and move it either up or down in the list.
  >
  > **d.** Click **Save**.

6. When you are finished, click the **Save** icon in the asset's toolbar.

7. To inspect the asset, click the **Inspect** icon in the asset's toolbar.

The tab displays the asset in its Inspect view. You cannot modify the asset in its Inspect view.

8.1.3 Disassociating Assets

To disassociate an asset from another asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset from which you want to disassociate one or more assets:

   a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      A "Search" tab opens displaying the results of your search.

      For more information on finding assets, see Chapter 6, "Finding and Organizing Assets".

   b. In the list of search results, navigate to the desired asset, right-click the asset's name and select **Edit** from the right-click menu.

      A tab opens displaying the Edit view of the asset in either Form Mode or Web Mode.

3. Remove the desired asset from the list of associated assets:

   – If you are working in Form Mode, navigate to the field representing the asset's associations and click the **Delete** (**X**) button next to each asset you want to disassociate.

   – If you are working in Web Mode and you wish to remove an asset from a slot representing a single-valued association, click the slot containing the asset you wish to disassociate. In the slot's toolbar, click the **X** button.

   – If you wish to remove an asset from a slot representing a multi-valued association, do the following:

      a. Click in the multi-valued slot.

         The slot's toolbar is displayed.

      b. In the slot's toolbar, click the **Manage** icon.

      c. In the slot's toolbar, click the **Manage** icon.

         The "Manage Slot Content" dialog box is displayed:

Figure 8–4   'Manage Slot Content' Dialog Box
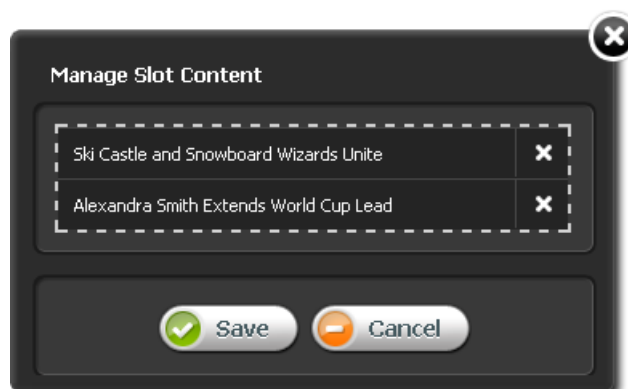
> > **d.** Click the **X** next to the asset you wish to remove.
> >
> > **e.** Click **Save**.
> >
> > WebCenter Sites removes the asset(s) from the association field.
>
> **4.** When you are finished, click the **Save** icon in the asset's toolbar.
>
> **5.** To inspect the asset, click the **Inspect** icon in the asset's toolbar.
>
> The tab displays the Inspect view of the asset. You cannot modify the asset in its Inspect view.

8.2 Parent-Child Relationships

When you designate an asset as a parent of another asset, you are creating a hierarchical relationship between the two assets. An asset that is linked to a parent is called a "child" asset.

A child asset inherits attribute values from its parent. This means that once a child asset is linked to a parent asset, it inherits the parent's attributes and values and retains the attributes it already has. If the parent and the child share the same multi-valued attribute, the child inherits the parent asset's values and retains its original values. If the parent and child share the same single-valued attribute, the child retains the attribute's current value and does not inherit the value of the parent.

Parent-child relationships are shown in the **Content Tree**. Parent-child relationships are taken into account during approval for publishing so that no broken links result on the published site. More information on approval for publishing can be found in Chapter 14, "Approval for Publishing."

Figure 8–5   Parent-Child Relationships
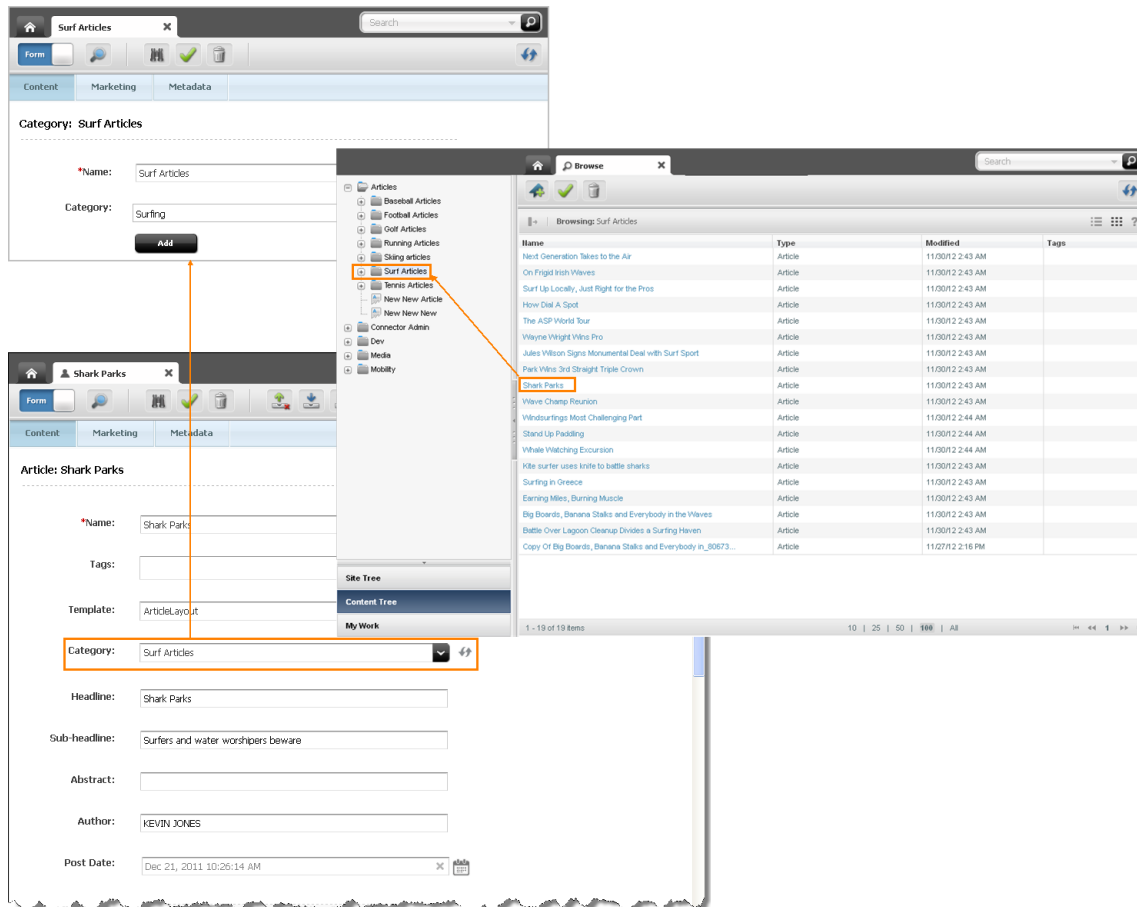
An asset can have more than one parent. When assigned multiple parents, the asset appears in multiple places in the **Content Tree**, as a child of every parent to which it is linked.

To designate a parent asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Do one of the following:

   – Begin creating an asset:

      – For instructions on creating assets in Form Mode, see Section 3.1.2, "Creating a New Asset in Form Mode."

      – For instructions on creating assets in Web Mode, see Section 4.2.3, "Creating a New Asset in Web Mode."

   – Open an existing asset for editing:

      – For instructions on editing assets in Form Mode, see Section 3.3, "Editing Assets in Form Mode."

      – For instructions on editing assets in Web Mode, see Section 4.4, "Editing Assets in Web Mode."

   A tab opens displaying the asset's Create or Edit view in either Form Mode or Web Mode.

3. In the asset's Create or Edit view, locate the association field in which you will designate a parent asset.

> **Note:** If you are working in Web Mode, the association field may be displayed as a slot. If you do not see a slot that accepts a parent asset, stop here. The layout (template) assigned to the asset is not coded to display this type of field. To assign the asset to a parent, you will have to switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

4. Find the parent asset you wish to designate as the parent of the asset with which you are working.

- Select the parent asset to associate from a search results list:

  a. In the **Search** field, enter criteria that describes the desired parent asset.

  b. (Optional) Limit your search to a specific asset type (for example, only assets of type "Article Category") by clicking the **down-arrow** in the **Search** field and selecting the name of the desired asset type.

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

- Select the parent asset to associate from the **Content Tree**:

  a. In the navigation pane, select the **Content Tree** bar.

  b. In the **Content Tree**, expand the nodes to expose the parent assets related to each node.

5. Designate the parent asset.

> **Note:** The type of field you see depends on the configurations your developers made to the asset's definition. In this example, we are designating a parent asset for an "Article" asset, in the avisports sample site, which displays a drop-down menu. In the FirstSite II sample site, the field in which you designate a parent asset is a Drop Zone.

For example, if you are working in Form Mode, use the drop-down menu in the **Category** field to select the desired parent asset.

WebCenter Sites associates the asset with the selected parent assets. The name of the associated parent asset is displayed in the field.

6. When you are finished, click the **Save** icon on the asset's toolbar.

8.3 Working with Grouped Assets

When working with assets, you might want to organize them in groups and place them in a specific order. If you are a marketer and the "Collection" asset type is enabled for the site with which you are working, you can create lists of assets related to other assets in some way based on context, or lists of asset that change based on some variable, such as the current date, or time of day. You might also want to deliver different groups of assets depending on the demographic data of your visitors. In such cases, you would use "Collection" and "Recommendation" assets.

This section contains the following:

- [Section 8.3.1, "Working with Collections"](#)
- [Section 8.3.2, "Building a Collection"](#)
- [Section 8.3.3, "Working with Recommendations"](#)

8.3.1 Working with Collections

Suppose you want to choose, rank in order, and deliver sets of content that your visitors will most likely want to see when viewing your site. For example, you might want to place five top political news stories, organized in the order of importance, on the home page of your site every morning. In a case like this, you can build your "Top Five" list of articles using a "Collection" asset.

A "Collection" asset stores a list of basic assets of a single asset type, organized in a specific order. The assets you can include in a collection come from the results returned by one or more queries. You choose the assets you want to include in the collection by ranking them in the order of your choice in the list of query results. This ranked, ordered list of assets is the collection.

Typically, site designers or administrators create "Collection" assets and assign the appropriate queries and templates to them. Your job is to choose the most suitable content to be included in the collection.

Keep in mind that once you build your collection, other users with the appropriate permissions can access the "Collection" assets you worked with and change your asset rankings within them.

Note: "Collection" assets can store lists of basic assets only. For flex assets, functionality similar to that of "Collection" assets (and much more) is provided by "Recommendation" assets (described later in this section).

8.3.2 Building a Collection

A "Collection" asset must already exist in the site you are working with in order for you to be able to build the desired collection. Your site designer or administrator is usually the person responsible for creating new "Collection" assets and editing existing ones.

To build a collection

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the collection you want to build:

   a. In the **Search** field, enter search criteria identifying the asset.

   b. (Optional) In the **Search** field, click the **down-arrow** to render the "Search Type" drop-down box. Select the "Collection" asset type to limit your search to only "Collection" assets. If you do not make a selection, WebCenter Sites will search across all asset types in the current site.

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

      A "Search" tab opens displaying the results of your search.

      For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

3. In the list of search results, navigate to the desired "Collection" asset and click its name.

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

4. If the "Collection" asset open in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

5. In the asset's Inspect view (in Form Mode), click **Build Collection**, located next to the name of the Collection asset (as shown in Figure 8–6).

Figure 8–6   Build Collection Asset
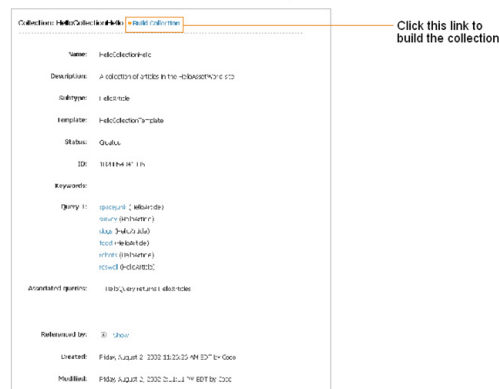
WebCenter Sites runs the query (or queries) in the collection and displays the results, as shown in Figure 8–7:

Figure 8–7   Collection Asset's Query Results

6. Rank the assets by entering the appropriate number (up to three digits) in the "Rank" column of the table. If you want to remove an asset that is included in the top list, in the "Remove" column, select the checkbox next to the name of the asset you wish to remove. Deleting an asset's rank number from the query list will not remove it from the collection.

> **Note:** When you rank the assets in your collection, do so in an order that is appropriate to the template element that renders the page. For example, if your collection contains 50 assets, but the template that renders it is coded to display only five, only the first five highest-ranked assets in the collection will be displayed on the page. Consult your site developers if you are unsure about the properties of the templates you are using.

7. Click **Save Changes**.

WebCenter Sites builds the collection and displays the collection in its Inspect view.

8.3.3 Working with Recommendations

"Recommendation" assets allow you to personalize product placements and promotional offerings that are displayed for each site visitor. Recommendations determine which assets (products, for example) should be featured or "recommended" on a page, based on available information about your site visitors (such as age, or last viewed product).

You can personalize the content your visitors view in the following ways:

- Create Static List recommendations. These are lists of assets that are displayed according to demographic criteria such as age, income, or other information in the site visitor's profile. (This criteria is defined in a "segment" and associated with a given static list recommendation.) For example, you can create a list of top dance clubs and show it only to visitors who specify their age range to be between 18 and 24. For visitors whose age falls outside this range, you can display another static list recommendation, for example, a list of top ten beach resorts.

- Create Related Items recommendations. Related Items recommendations allow you to link to each other assets that bear some sort of relation to one another. This way, whenever a visitor views an asset that is linked to another asset via a Related Items recommendation, he/she will also see the related asset. You can thus create a "path" or a "link trail" for your visitors to follow by consecutively linking assets to one another using a Related Items recommendation.

  The goal is to persuade your visitors to view additional content related to the content they are viewing at a given moment by showing them a teaser for the related content alongside the main content. Related Items recommendations are thus excellent for business tactics such as up-selling or cross-selling merchandise.

  For example, you can link to one another a number of movies that share a common theme or genre, such as the Godfather trilogy. You link part I of the trilogy to part II, and part II to part III using a Related Items recommendation. This way, when a visitor looks at part I of the trilogy, Sites will also show part II. When the visitor then looks at part II, Sites will also show part III. Additionally, you could link parts II and III to part I so your visitors know they should watch part I first when they view part II or III.

- Create Dynamic List recommendations. Unlike Static List and Related Items recommendations, the functionality of Dynamic List recommendations is defined by customized code written by your developers. Because of that, Dynamic List recommendations are the most flexible out of the three types of "Recommendation" assets in terms of fulfilling specific business needs. For example, your developers can code a Dynamic List recommendation to behave like a Related Items recommendation, but instead of requiring the related assets be linked manually, the recommendation can track the movies a visitor has bought in the past and recommend movies that most closely match his or her past purchases in terms of theme or genre. In such case, you would simply assign the recommendation to the assets you want to be included in the recommendation.

The choice regarding the type of recommendations used depends largely on how you or your site designers want your site to behave. For information about creating "Recommendation" assets, see Chapter 19, "Creating and Configuring Recommendations with Engage."

9

Linking Assets

When creating and updating assets, you have the option to link the assets to each other in several ways, as long as the assets are on the same site.
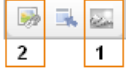
This chapter includes the following sections:

- Section 9.1, "Overview"
- Section 9.2, "Linking Two Assets Directly"
- Section 9.4, "Linking Two Assets via an Image Asset"
- Section 9.5, "Linking Assets to URLs"

9.1 Overview

Some assets' Create and Edit views have a CKEditor enabled field. CKEditor supports a wide range of formatting options, such as the option to link assets to each other using the link icons located on the CKEditor toolbar. The table below identifies the icons on the CKEditor toolbar that you will be working with for the following linking procedures:

Type of Link	Icon(s)	Description	For Linking Procedures, See
Linking two assets directly: Scenario 1	**Add asset link**	Used to create a hyperlink to the target asset from the referring asset.	Section 9.3, "To Create a Hypertext Link to Another Asset"
Linking two assets directly: Scenario 2	**Include Asset**	Used to dynamically include the previewable content of one asset in another.	Section 9.3.1, "To Link Two Assets by Inclusion"

Type of Link	Icon(s)	Description	For Linking Procedures, See
Link two assets via an image asset: Scenario 1	**1.** Include Asset **2.** Add asset link	**1.** The **Include Asset** icon is used to include an image from the "Bookmarks" node (located in the **My Work** tree) into the referring asset's CKEditor enabled field. **Note:** If you did not bookmark the desired image, you can use the search feature to find the image. **2.** Once the image is included, the **Add asset link** icon is used to hyperlink the image to another asset.	Section 9.4.2, "Linking via an Image from the "Bookmarks" Node"
Link two assets via an image asset: Scenario 1	**1.** Pick an Image to Include **2.** Add asset link	**1.** The **Pick an image to include** icon is used to include an image from the "Image Picker," into the referring asset's CKEditor enabled field. **2.** Once the image is included, the **Add asset link** icon is used to hyperlink the image to the target asset.	Section 9.4.3, "Linking via an Image from the Image Picker"
Linking assets to URLs	Link	Used to insert a hypertext link to a **URL** into the referring asset's CKEditor enabled field. Additional options, such as Email, are also available in the Link icon, but they are not covered in this guide. For more information about the additional options, refer to the CKEditor's documentation at: `http://docs.cksource.com`	Section 9.5, "Linking Assets to URLs"

9.2 Linking Two Assets Directly

This section contains prerequisite steps and instructions for linking two assets, as follows:

- **Creating a hypertext link to another asset**

You may have two assets—article assets, for example—with related content that you wish to join by a hypertext link. Working in the main article, you would use the **Add asset link** icon on the CKEditor toolbar to insert a hypertext link to the related article. When site visitors access the main article's content, they can click the inserted hypertext link to render the related article's content.

- **Linking two assets by inclusion**

    A commonly performed CM operation is to insert previewable content from one asset into another asset, but without manually copying the content. Instead, the content is inserted "by reference," so that it can be dynamically updated at the insertion point when the target asset (the source of content) is modified.

    In this scenario, you would use the **Include Asset** icon in the CKEditor toolbar to insert the asset, whose previewable content is then rendered *dynamically* at the insertion point.

    When using **Include Asset**, you are actually inserting a link to the target asset, but rendering the link in the form of the target asset's previewable content. The link persists after the target asset is included. As a result, the content is not editable at the insertion point, but it is refreshed when the target asset (the source of content) is modified. To view refreshed content, you must refresh the referring asset by clicking the **Refresh** icon in the referring asset's toolbar.

The extent to which these capabilities are available to you depends on how your site designers have implemented them as part of the custom asset design. For example, the "Article" asset type that ships with the avisports sample site is configured with a CKEditor in its "Body" field. Therefore the "Body" field supports the types of links described above.

9.2.1 Prerequisites

Before linking assets, you must verify that they can be linked. Use this section as a checklist. (It is assumed that you know how to edit and preview assets, and create them, if necessary. Basic instructions are given in various steps.)

9.2.1.1 Participating Assets

Two assets are involved in this procedure, and both assets are on the same site:

- The referring asset (in which you will create the link to the target asset)

- The target asset (which will be rendered when the link is clicked)

9.2.1.2 Referring Asset

- The referring asset displays the CKEditor in the field where you will place the link. If you need instructions for verifying that CKEditor is displayed, complete the following steps:

    Note: If you are creating a new referring asset, you can start this procedure in the asset's Create view. However, it is best to save the asset and then open its Edit view (to ensure against possible loss of any existing content, as you move from step to step).

    a. Open the referring asset in its Edit view. If you need to find the referring asset, do the following:

      a. In the **Search** field, enter the desired search criteria (if any) and then click the **magnifying glass** button.

      b. In the search results list, navigate to and right-click the name of the desired asset. In the right-click menu, select **Edit**.

  b. Navigate to the field in which you want to place the link. Click in the field to make sure it displays the CKEditor.

> **Note:** By default, CKEditor is not displayed automatically when the asset's Edit view opens. To display the CKEditor, click in the field. If the CKEditor does not appear, then the field is not CKEditor enabled and the assets cannot be linked. Contact your system administrator to have the field enabled.

- If you intend to publish the referring asset, the asset must be previewable, including the field where you will place the link. (Ensure that the referring asset can be rendered by one of the templates listed in the asset's "Template" field. For instructions on previewing assets, see Chapter 7, "Previewing Assets.")

9.2.1.3 Target Asset

- The target asset is previewable (ensure that the target asset can be rendered by one of the templates that is listed in the asset's "Template" field.

- (Optional) The target asset is readily available for linking (ensure that the target asset is placed in the "Bookmarks" node, located in the **My Work** tree in the navigation pane).

> **Note:** Placing target assets in the "Bookmarks" node is most efficient when linking large numbers of target assets to a source asset. When you are linking only one target asset to a source asset, you can conduct a search for the target asset while working in the source asset's Edit view. (If you are trying to link a large number of assets to a source asset, you will have to conduct a separate search for each target asset.) When you conduct a search for a target asset, the search results are displayed (docked) to the right of the source asset's Edit view. For information about searching for assets, see Section 6.1, "Overview of Finding Assets".

  a. Find the target asset and place it in the "Bookmarks" node:

      a. In the **Search** field, enter the desired search criteria (if any) and click the **magnifying glass** button.

      b. In the search results list, navigate to and right-click the desired asset. In the right-click menu, select **Bookmark**.

  b. Make sure the target asset is displayed in the **Bookmarks** node:

      a. In the navigation pane, click the **My Work** bar.

      b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

      c. Make sure the target asset is displayed in the list of assets underneath the "Bookmarks" node.

9.2.1.4 Next Step

At this point you are ready to link the assets. Continue to any one of the following sections, depending on how you wish to link the assets:

- Section 9.3, "To Create a Hypertext Link to Another Asset"

- Section 9.3.1, "To Link Two Assets by Inclusion"

9.3 To Create a Hypertext Link to Another Asset

1. Ensure that all prerequisites in Section 9.2.1, "Prerequisites" are met.

2. Open the referring asset in its Edit view.

3. Insert the link to the target asset:

   a. In the navigation pane, click the **My Work** bar.

   b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

   A list of bookmarked assets is displayed underneath the **Bookmarks** node.

   c. In the desired field of the referring asset, select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.

   To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize** *icon (as shown in* Figure 9–1*).*

Figure 9–1   'Maximize' Icon

   d. On the CKEditor's toolbar, click the **Add asset link** icon (as shown in Figure 9–2).

Figure 9–2   'Add Asset Link' Icon
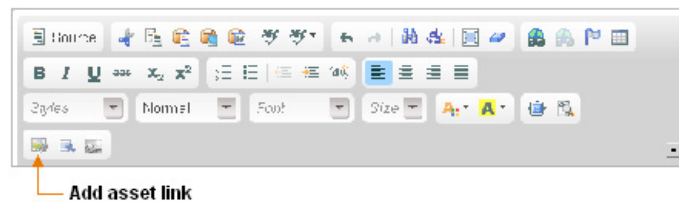
   The "Insert Embedded Link" dialog box opens:

Figure 9–3   'Insert Embedded Link' Dialog Box

a.   Navigate to the expanded **Bookmarks** node in the **My Work** tree. Select
     the desired asset and drag it to the drag and drop field in the "Insert
     Embedded Link" dialog box. Then drop the asset into the field.

     The dialog box displays the layouts (templates) available to be assigned to
     the target the asset.

b.   Select a layout (template) to assign to the target asset. The layout
     (template) you select will render the target asset when the hyperlink is
     clicked.

c.   In the "Wrappers" field, select the wrapper with which you want to render
     the target asset.

d.   (Optional) In the "Link Anchor" field, provide a secondary link. If the
     primary link to the target asset is broken in some way, the secondary link
     is used instead.

e.   In the "Link Text" field, verify the text you selected to be the hyperlink
     (step 3c). If necessary, edit the text.

f.   If the "Template Arguments" section displays the "Name" and "Value"
     menus, you can use them to set properties for the target asset. Select the
     parameters that you need (one at a time), enter a value, and click **Add**.

Note: The "Extra Parameters" section is enabled only if developers
have configured parameters for the template that is assigned to the
target asset. Otherwise, the "Template Arguments" section displays the
message "No arguments defined for template *Name*."

---

g.   Click **Apply**.

h.   Click **OK** to save the link.

     The dialog box closes, and the linked text is displayed in the field, under-
     lined and surrounded by a blue border, as shown in Figure 9–4:

Figure 9–4   Linked Text in the CKEditor Field

Asset link
(underlined and
surrounded by blue
border)
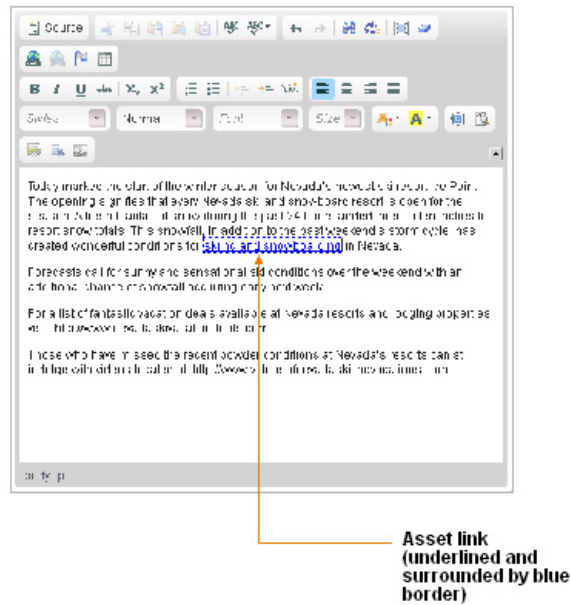
4. Right-click the linked text to open its context menu. From the context menu you can:

   – Cut Linked Asset

   – Copy Linked Asset

   – Edit Properties

   – Remove Linked Asset

   > **Note:** The **Remove Linked Asset** option removes the link function, but not the text of the link. To restore the link function, press **Ctrl+Z** until the underline and blue border re-appear.

5. Save the referring asset:

   a. If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.

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

6. Test the link by previewing the referring asset:

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

   b. Click the hypertext link to display the target asset.

9.3.1 To Link Two Assets by Inclusion

1. Ensure that all prerequisites in Section 9.2.1, "Prerequisites" are met.

2. Open the referring asset in its Edit view.

3. Include the target asset:

   a. In the navigation pane, click the **My Work** bar.

b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

A list of bookmarked assets is displayed underneath the **Bookmarks** node.

c. In the desired field of the referring asset, place your cursor at the point where you want to include the previewable content of the target asset.

To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize** *icon (as shown in* Figure 9–5).

Figure 9–5   'Maximize' Icon

Maximize the editor size

d. On the CKEditor's toolbar, click the **Include Asset** icon (as shown in Figure 9–6).

Figure 9–6   'Include Asset' Icon
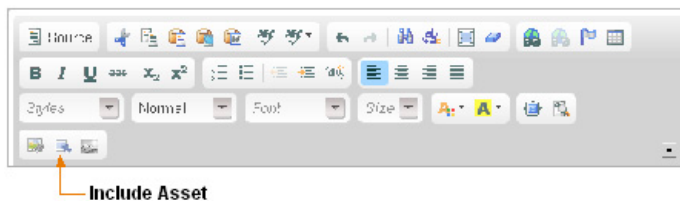
Include Asset

The "Insert Included Asset" dialog box opens, as shown in Figure 9–7:

Figure 9–7   'Insert Included Asset' Dialog Box
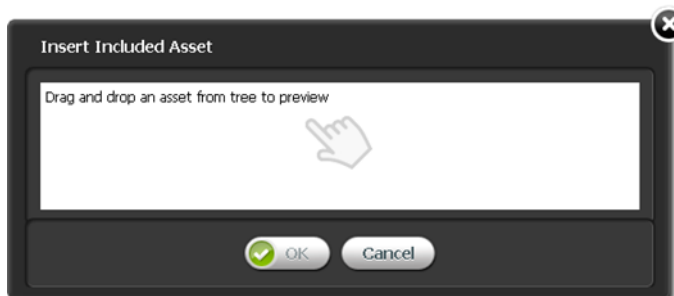
a. Navigate to the expanded **Bookmarks** node in the **My Work** tree. Select the desired asset and drag it to the drag and drop field in the "Insert Included Asset" dialog box. Then drop the asset into the field.

The dialog box displays the layouts (templates) available to be assigned to the target asset.

b. Select a layout (template) to assign to the target asset. The layout (template) you select will render the target asset at its insertion point in the referring asset.

    c. If the "Template Arguments" section displays the "Name" and "Value" menus, you can use them to set properties for the included asset. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note:** The "Template Arguments" section is enabled only if developers have configured parameters for the template that is assigned to the included asset. Otherwise, the "Template Arguments" section displays the message "No arguments defined for template *Name*."

    d. Click **OK**.

    The dialog box closes, and the target asset's previewable content is rendered within the referring asset by the layout (template) you selected.

> **Note:** If you click on the included asset, you will find that all of its content is selected. You cannot select its individual pieces of content. The content is editable only in the target asset (the source of content).
>
> When the target asset is edited, the included content in the referring asset is automatically updated, but not in real time. To view an update, you must refresh the referring asset.

4. You can now work with the included asset as follows:

    a. Right-click the included asset to open its context menu. From the context menu you can:

        – Cut Included Asset

        – Copy Included Asset

        – Edit Properties

        – Remove Included Asset

    b. If you want to resize the included asset or view its properties, double-click the included asset. When you double-click the asset, a properties window opens. You can adjust the size and alignment of the asset from the properties window.

5. Save the referring asset:

    a. If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.

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

6. Verify that the included asset is properly rendered by clicking the **Preview** icon, in the referring asset's toolbar.

9.4 Linking Two Assets via an Image Asset

Company logos (and other images) are often used as links to various types of content: news about the company, products and services offered by the company, and so on. WebCenter Sites enables you to include an image asset in a given asset, and then hyperlink the image to another (target) asset. Clicking the image renders the target asset's previewable content.

> **Note:** If an image will be used to link two assets, the image must be part of an image asset.

This section contains prerequisite steps and instructions for linking two assets via an image asset. Before continuing with the rest of this section, determine whether you will be including the image from the **Bookmarks** node (located in the navigation pane, in the **My Work** tree), or from the "Image Picker":

- **Linking via an image from the "Bookmarks" node using CKEditor**

  In the CKEditor enabled field of the asset you are working with, you may want to include an image asset that you have bookmarked. From the CKEditor toolbar use the **Include asset** icon to include the image in the field. Use the **Add asset link** icon to hyperlink the included image to another asset.

- **Linking via an image from the Image Picker using CKEditor**

  You might work with an asset that is not enabled with an "Image Picker." If you prefer to choose your image assets from the "Image Picker," CKEditor is capable of invoking an "Image Picker." From the CKEditor toolbar, use the **Pick an image to include** icon to access the "Image Picker," and select an image to include in the field. Use the **Add asset link** icon to hyperlink the included image to the target asset.

> **Note:** The **Pick an image to include** icon is enabled by the developers of your site. If the icon has not been enabled, then it will appear in grey on the CKEditor toolbar. If this is the case, you can contact your administrator or, see Section 9.4.2, "Linking via an Image from the "Bookmarks" Node" for an alternate method of linking two assets via an image asset.

9.4.1 Prerequisites

Before linking assets, you must verify that they can be linked. Use this section as a checklist. (It is assumed that you know how to edit and preview assets, and create them, if necessary. Basic instructions are given in various steps.)

9.4.1.1 Participating Assets

Three assets are involved in this procedure, and all three assets are on the same site:

- The referring asset (in which you will include and hyperlink the image asset)
- The image asset (which you will include in the referring asset)
- The target asset (to which you will link the image asset)

9.4.1.2 Referring Asset

- The referring asset displays the CKEditor in the field where you will place the link. If you need instructions for verifying that CKEditor is displayed, complete the following steps:

> **Note:** If you are creating a new referring asset, you can start this procedure in the asset's Create view. However, it is best to save the asset and then open its Edit view (to ensure against possible loss of any existing content, as you move from step to step).

a. Open the referring asset in its Edit view. If you need to find the referring asset, do the following:

   a. In the Search field, enter the desired search criteria (if any) and then click the magnifying glass button.

   b. In the search results list, navigate to and right-click the desired asset. In the context menu, select Edit.

b. Navigate to the field in which you would like to place the image asset. Click in the field to make sure it displays the CKEditor.

> **Note:** By default, CKEditor is not displayed automatically when the asset's Edit view opens. Click in the field to display the CKEditor. If the CKEditor does not appear, then linking is not supported in the field. Contact your system administrator to have the field enabled with CKEditor.

- If you intend to publish the referring asset, the asset must be previewable, including the field where you will include the image. (Ensure that the referring asset can be rendered by one of the templates listed in the asset's "Template" field). For instructions on previewing assets, see Chapter 7, "Previewing Assets."

9.4.1.3 Image Asset

- The image asset is previewable. Ensure that *only the image is rendered* by one of the templates that is listed in the asset's "Template" field.

> **Note:** Rendering additional content (such as text) can interfere with and corrupt the linking process

- Determine whether you will be including an image from the "Image Picker" or from the **Bookmarks** node (located in the **My Work** tree):

   – **If you are including an image from the "Bookmarks" node**. The image asset is readily available for inclusion. Place the image asset into the **Bookmarks** node, located in the **My Work** tree of the navigation pane, for easy retrieval during the linking process.

      a. Find the image asset and place it in the Bookmarks node:

         In the **Search** field, enter the desired search criteria (if any) and then click the **magnifying glass** button.

         In the search results list, navigate to and right-click the desired asset. In the context menu, select **Bookmark**.

      b. Make sure the image asset is displayed in the Bookmarks node

         In the navigation pane, click the **My Work** bar.

         In the **My Work** tree, navigate to and expand the **Bookmarks** node.

The image asset should be displayed in the list of assets underneath the Bookmarks node.

- If you are including an image from the Image Picker. The image you wish to include is available from the "Image Picker." (Developers enable the "Image Picker" for the Pick an image to include icon. If more than one "Image Picker" exists, developers will also determine which "Image Picker" is rendered when the Pick an image to include icon is selected.)

9.4.1.4 Target Asset

The target asset is also previewable and readily available for linking.

- The target asset can be rendered by one of the templates listed in the asset's "Template" field.

- (Optional) The target asset is placed in the **Bookmarks** node (in the **My Work** tree) for easy retrieval during the linking process. (For instructions about placing assets in the "Bookmarks" node, see step a.)

Note: Placing target assets in the **Bookmarks** node is most efficient when linking large numbers of target assets to a source asset. When you are linking only one target asset to a source asset, you can conduct a search for the target asset while working in the source asset's Edit view. (If you are trying to link a large number of assets to a source asset, you may have to conduct a separate search for each target asset.) When you conduct a search for a target asset, the search results are displayed (docked) to the right of the source asset's Edit view. For information about searching for assets, see Section 6.1, "Overview of Finding Assets."

9.4.1.5 Next Step

At this point you are ready to link the assets. Continue to any one of the following sections, depending on where you will retrieve the image from:

- Section 9.4.2, "Linking via an Image from the "Bookmarks" Node"

- Section 9.4.3, "Linking via an Image from the Image Picker"

9.4.2 Linking via an Image from the "Bookmarks" Node

Assuming that all prerequisites inSection 9.4.1, "Prerequisites" are met, continue as follows:

Include the image asset in the referring asset:

1. Open the referring asset in its Edit view.

2. Include the image asset:

   a. In the navigation pane, click the **My Work** bar.

   b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

   A list of bookmarked assets is displayed underneath the **Bookmarks** node.

   c. In the desired field of the referring asset, place your cursor at the point where you want the image asset to be rendered.

To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize** *icon (as shown in* Figure 9–8*).*

Figure 9–8   *'Maximize' Icon*
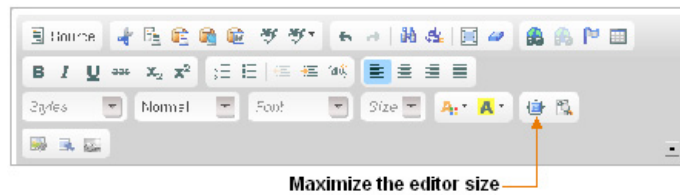
Figure 9–9   *'Include Asset' Icon*

   d. On the CKEditor toolbar, click the **Include Asset** icon (as shown in Figure 9–9).
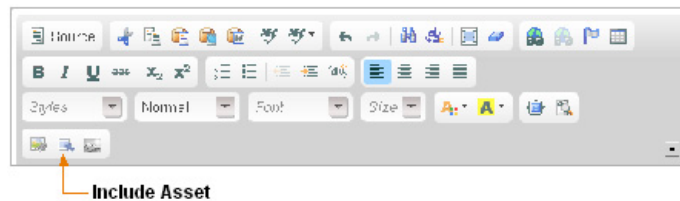
The "Insert Included Asset" dialog box opens, as shown in Figure 9–10:

Figure 9–10   *'Insert Included Asset' dialog box*

   a. Navigate to the expanded **Bookmarks** node in the **My Work** tree. Select the desired asset and drag it to the drag and drop field in the "Insert Included Asset" dialog box. Then drop the asset into the field.

The dialog box displays the layouts (templates) available to be assigned to the target asset.

   b. Select a layout (template) to assign to the included asset. The layout (template) you select will render the included asset at its insertion point in the referring asset.

   c. If the "Template Arguments" section displays the "Name" and "Value" menus, you can use them to set properties for the included asset. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note:** The "Template Arguments" section is enabled only if developers have configured parameters for the template that is assigned to the included asset. Otherwise, the "Template Arguments" section displays the message "No arguments defined for template *Name*."

d. Click **OK** to save the included asset.

The dialog box closes, and the image is rendered in the field with the layout (template) you selected (as shown in Figure 9–11):

Figure 9–11 Included Image in the CKEditor Field
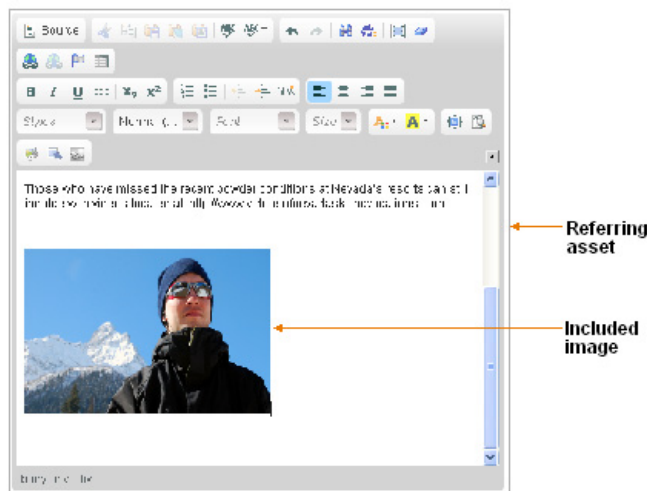
3. If you change your mind about the image or wish to make other adjustments, right-click the linked image to open its context menu. From the context menu you can:

– Cut Included Asset

– Copy Included Asset

– Edit Properties

– Remove Included Asset

4. If you want to resize the included image or view its properties, double-click the included image. When you double-click the image, a properties window opens. You can adjust the size and alignment of the asset from the properties window.

Link the image to the target asset:

1. Now that the image is rendered in the referring asset's field, create a hyperlink from the image to the target asset:

a. In the navigation pane, click the **My Work** bar.

b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

A list of bookmarked assets is displayed underneath the **Bookmarks** node.

c. In the referring asset's field, select the image you have just inserted.

d. On the CKEditor toolbar, click the **Add asset link** icon (shown in Figure 9–12).

Figure 9–12   'Add Asset Link' Icon
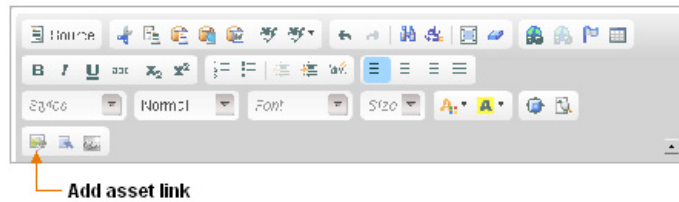
The "Insert Embedded Link" dialog box opens, as shown in Figure 9–13:

Figure 9–13   'Insert Embedded Link' Dialog Box

   a.   Navigate to the expanded **Bookmarks** node in the **My Work** tree. Select the desired asset and drag it to the drag and drop field in the "Insert Embedded Link" dialog box. Then drop the asset into the field.

        The dialog box displays the layouts (templates) available to be assigned to the target asset.

   b.   Select the layout (template) to assign to the target asset. The layout (template) you select will render the target asset when the hyperlink is clicked.

   c.   In the "Wrappers" drop-down field, select the wrapper with which you want to render the target asset.

   d.   (Optional) In the "Link Anchor" field, provide a secondary link. If the primary link to the target asset is broken in some way, the secondary link is used instead.

   e.   If you do not want to link the included image to the target asset, you can choose to replace the included image with text. In the "Link Text" field, enter the text you wish to hyperlink. The image is replaced with the text you enter into this field.

   f.   If the "Template Arguments" section displays the "Name" and "Value" menus, you can use them to set properties for the target asset. Select the parameters that you need (one at a time), enter a value, and click Add.

> **Note:**   The "Template Arguments" section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, the "Template Arguments" section displays the message (No arguments defined for template *Name*."

   g.   Click **Apply**.

h. Click **OK** to save the link.

The dialog box closes, and the image you included in the field now appears as a hyperlink, surrounded by a blue border.

2. At this point, you can work with the linked image by right-clicking it to open its context menu. From the context menu you can:

– Cut Linked Asset

– Copy Linked Asset

– Edit Properties

– Remove Linked Asset

Note: The **Remove Linked Asset** option removes the link function, but not the included image. To restore the link function, press **Ctrl+Z** until the blue border re-appears.

---

a. Enter text before or after the linked image.

3. Save the referring asset:

a. If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.

b. Click the **Save** icon.

Test the linked image:

If the referring asset is previewable, click the **Preview** icon, in the asset's toolbar, to preview and test the linked image. Click the image to render the target asset.

9.4.3 Linking via an Image from the Image Picker

Assuming that all prerequisites in Section 9.4.1, "Prerequisites" are met, continue as follows:

Include the image asset in the referring asset:

1. Open the referring asset in its Edit view.

2. Include the image:

a. In the desired field of the referring asset, place your cursor at the point where you wish to include the image.

To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize** *icon (shown in* Figure 9–14*).*

Figure 9–14   'Maximize' Icon

Maximize the editor size

b. In the CKEditor toolbar, click the **Pick an Image to Include** icon (shown in Figure 9–15).

Figure 9–15   'Pick an Image to Include' Icon

Pick an Image to Include
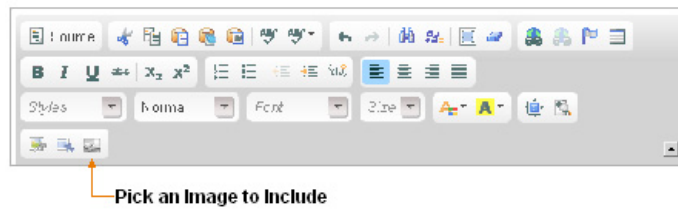
The Image Picker and the "Insert Included Asset" window open, as follows:

– The "Image Picker" opens to the right of the referring asset's Edit view, as shown in Figure 9–16.

Figure 9–16   Image Picker Docked to the Right of the Asset

Image Picker displayed in a search results list docked to the right of the referring asset's Edit view.
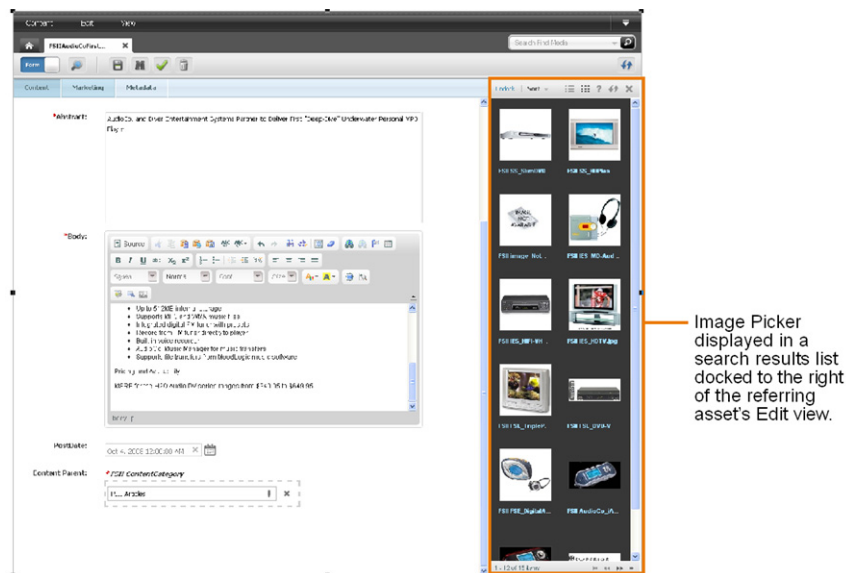
– The "Insert Included Asset" pop-up window opens, as shown in Figure 9–17:

Figure 9–17   'Insert Included Asset' Pop-Up Window
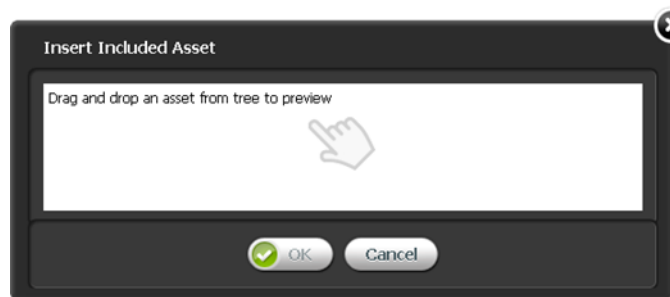
a. Navigate to the "Image Picker" (docked to the right of the referring asset's Edit view). Select the desired image asset and drag it to the drag and drop

field in the "Insert Included Asset" pop-up window. Then drop the image asset into the field.

The window displays the layouts (templates) available to be assigned to the image asset.

b. Select a layout (template) to assign to the image asset. The layout (template) you select will render the image asset at its insertion point in the referring asset.

c. If the "Template Arguments" section displays the "Name" and "Value" menus, you can use them to set the properties of the included image asset. Select the parameters that you need (one at a time), enter a value, and click Add.

Note: The "Template Arguments" section is enabled only if developers have configured the parameters for the template that is associated with the image asset. Otherwise, the "Template Arguments" section displays the message "No arguments defined for template *Name*."

---

d. Click **OK** to save the included image asset.

The pop-up window closes, and the image is rendered within the referring asset by the template that you selected.

3. You can now work with the included image as follows:

Right-click the included image to open its context menu. From the context menu you can:

– Cut Included Asset

– Copy Included Asset

– Edit Properties

– Remove Included Asset

4. If you want to resize the included image or view its properties, double-click the included image. When you double-click the image, a properties window opens. You can adjust the size and alignment of the asset from the properties window.

Link the image asset to the target asset:

1. Now that the image is rendered in the field, create a hyperlink from the image to the target asset:

a. In the navigation pane, click the **My Work** bar.

b. In the **My Work** tree, navigate to and expand the **Bookmarks** node.

A list of bookmarked assets is displayed underneath the **Bookmarks** node.

c. In the referring asset's field, select the image you just included.

d. In the CKEditor toolbar, click the **Add asset link** icon (shown in Figure 9–18).

Figure 9–18   'Add Asset Link' Icon
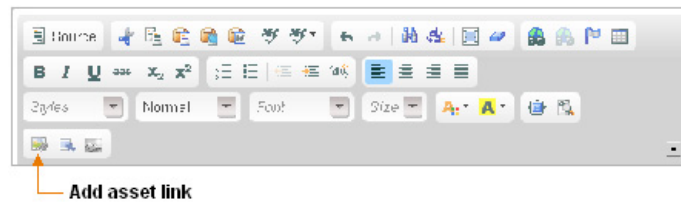
The "Insert Embedded Link" pop-up window opens, as shown in Figure 9–19:

Figure 9–19   'Insert Embedded Link' Pop-Up Window

a. Navigate to the expanded **Bookmarks** node in the **My Work** tree. Select the desired asset and drag it to the drag and drop field in the "Insert Embedded Link" window. Then drop the asset into the field.

The window displays the layouts (templates) available to be assigned to the target asset.

b. Select a layout (template) to assign to the target asset. The layout (template) you select will render the target asset when the hyperlinked image is clicked.

c. In the "Wrappers" drop-down menu, select the wrapper with which you want to render the target asset.

d. (Optional) In the Link Anchor field, provide a secondary link. If the primary link to the target asset is broken in some way, the secondary link is used instead.

e. If the "Template Arguments" section displays the "Name" and "Value" menus, you can use them to set the properties of the target asset. Select the parameters that you need (one at a time), enter a value, and click **Add**.

Note: The "Template Arguments" section is enabled only if developers have configured the parameters for the template that is assigned to the target asset. Otherwise, the "Template Arguments" section displays the message "No arguments defined for template *Name*."

---

f. Click **OK** to save the link.

2. At this point, you can work with the linked image as follows:

a. Right-click the linked image to open its context menu. From the context menu you can:

- – Cut Linked Asset

- – Copy Linked Asset

- – Edit Properties

- – Remove Linked Asset

Note: The **Remove Linked Asset** option removes the link function, but not the included image. To restore the link function, press **Ctrl+Z** until the blue border re-appears.

---

   b. Enter text before or after the linked image.

3. Save the referring asset:

   a. If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.

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

Test the linked image:

If the referring asset is previewable, click the **Preview** icon, in the asset's toolbar, to preview and test the linked image. Click the image to render the target asset.

9.5 Linking Assets to URLs

Using CKEditor, you can link WebCenter Sites assets to URLs by creating a hypertext link to the desired website's URL. A link to a URL is not stored in its own field in the WebCenter Sites database. The link can be created directly within any CKEditor-enabled field of a WebCenter Sites asset, but it cannot be managed as an asset. As a result, the user who creates a link to a URL must manually validate the URL.

The extent to which this capability is available to you depends on whether CKEditor is configured for your custom asset types. For example, the "Article" asset type that ships with the avisports sample site is configured with a CKEditor in its "Body" field. Therefore the "Body" field supports the creation of a link to a URL as described above. The rest of this section describes how to link assets to URLs.

To create a link to a URL

1. Find the referring asset (in which you will specify a URL) and open its Edit view. If you need to find the referring asset, do the following:

   a. In the **Search** field, enter the desired search criteria (if any) and then click the **magnifying glass** button.

   b. In the search results list, navigate to and right-click the desired asset. In the context menu, select **Edit**.

Note: If you are creating a new referring asset, you can start this procedure in the asset's Create view. However, it is best to save the asset and then open its Edit view (to ensure against possible loss of any existing content, as you move from step to step)

---

2. Navigate to the field in which you would like to place the link. Click in the field to make sure it displays the CKEditor.

> **Note:** By default, CKEditor is not displayed automatically when the asset's Edit view opens. Click in the field to display the CKEditor. If the CKEditor does not appear, then linking is not supported in the field. Contact your system administrator to have the field enabled with CKEditor.

3. In the desired field, select the text that you want to be the hyperlink. Alternatively, you can type new text anywhere in the field and select it.

   To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize** *icon (shown in* Figure 9–20*).*

Figure 9–20   'Maximize' Icon

4. On the CKEditor toolbar, click the **Link** icon (shown in Figure 9–21).

Figure 9–21   'Link' Icon
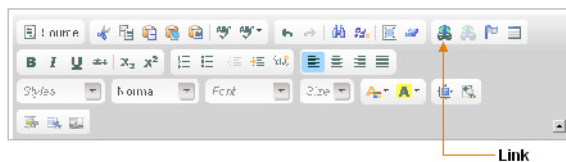
The "Link" pop-up window opens, as shown in Figure 9–22:

Figure 9–22   'Link' Pop-Up Window
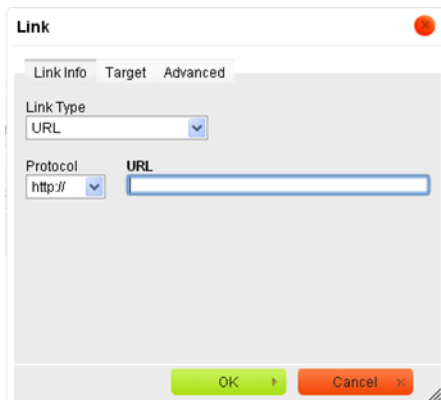
   a. In the "Link Type" field, select **URL**.

   b. In the "URL" field, type the URL of the website you wish to link to.

c. Click **OK** to convert the selected text to a link.

The pop-up window closes, and the hyperlinked text appears underlined in the field, as shown in Figure 9–23:

Figure 9–23   Hyperlinked Text in CKEditor Field
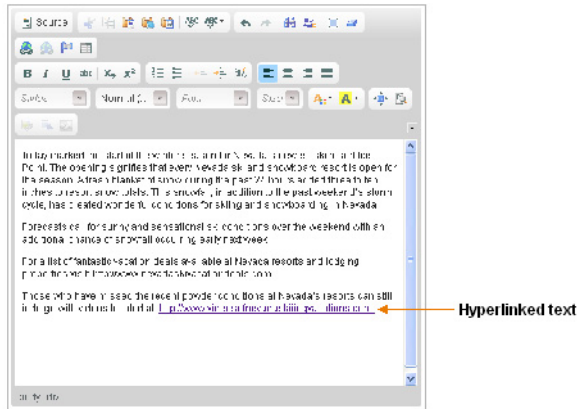
5. If you wish to make adjustments to the link, right-click the link to open its context menu. From the context menu you can:

– Cut

– Copy

– Edit Link

– Unlink

> **Note:**   The **Unlink** option removes the link function, but not the text of the link. To restore the link function, press **Ctrl+Z** until the underscore re-appears.

6. Save the referring asset:

a. If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.

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

7. View and test the link.

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

b. In the preview of the referring asset, click the link to open the corresponding web page in a browser window.

10

Creating a Website's Navigation

This chapter provides information about creating the navigation for your website by using the **Site Tree** in the Contributor interface to place and unplace pages.

> **Note:** WebCenter Sites offers multiple ways to create a website's navigation. Your site design determines the way in which your website's navigation is created. In this section, we assume that your site design is configured to allow you to create your website's navigation using the **Site Tree** in the WebCenter Sites Contributor interface. For information about how the navigation for your website is created, see your site developers.

This chapter contains the following sections:

- Section 10.1, "Overview of a Website's Navigation"
- Section 10.2, "Placing and Unplacing Pages"
- Section 10.3, "Creating a Website's Navigation by Copying an Existing Navigation"

10.1 Overview of a Website's Navigation

A website's navigation allows visitors to access the different sections (pages, articles, and so on) of that site. The navigation of your website is determined by the placement of the "Page" assets under a site plan in the **Site Tree** of the Contributor interface (shown in Figure 10–1). A site plan reflects the website's navigation and enables you to create a hierarchy for the pages of your site. This means that the structure of your site's navigation starts off general and drills down to specific.

> **Note:** Since the content of a single CM site can be utilized by multiple websites, the **Site Tree** displays as many site plans as there are websites using the content of that one CM site.

For example, if you place a page underneath an already placed page of a site plan in the **Site Tree**, the page you placed becomes a sub-level of the page under which you placed it. You can also copy the Pages placed under one site plan and paste them under another site plan. When the Pages are published to the website, the Page you placed as a sub-level is accessible from the top-level Page's navigation menu. Figure 10–1 shows the dynamic relationship between the placement of Pages under a site plan in the **Site Tree** and your website's navigation.

Figure 10–1   Relationship Between the Site Tree and Your Site's Navigation
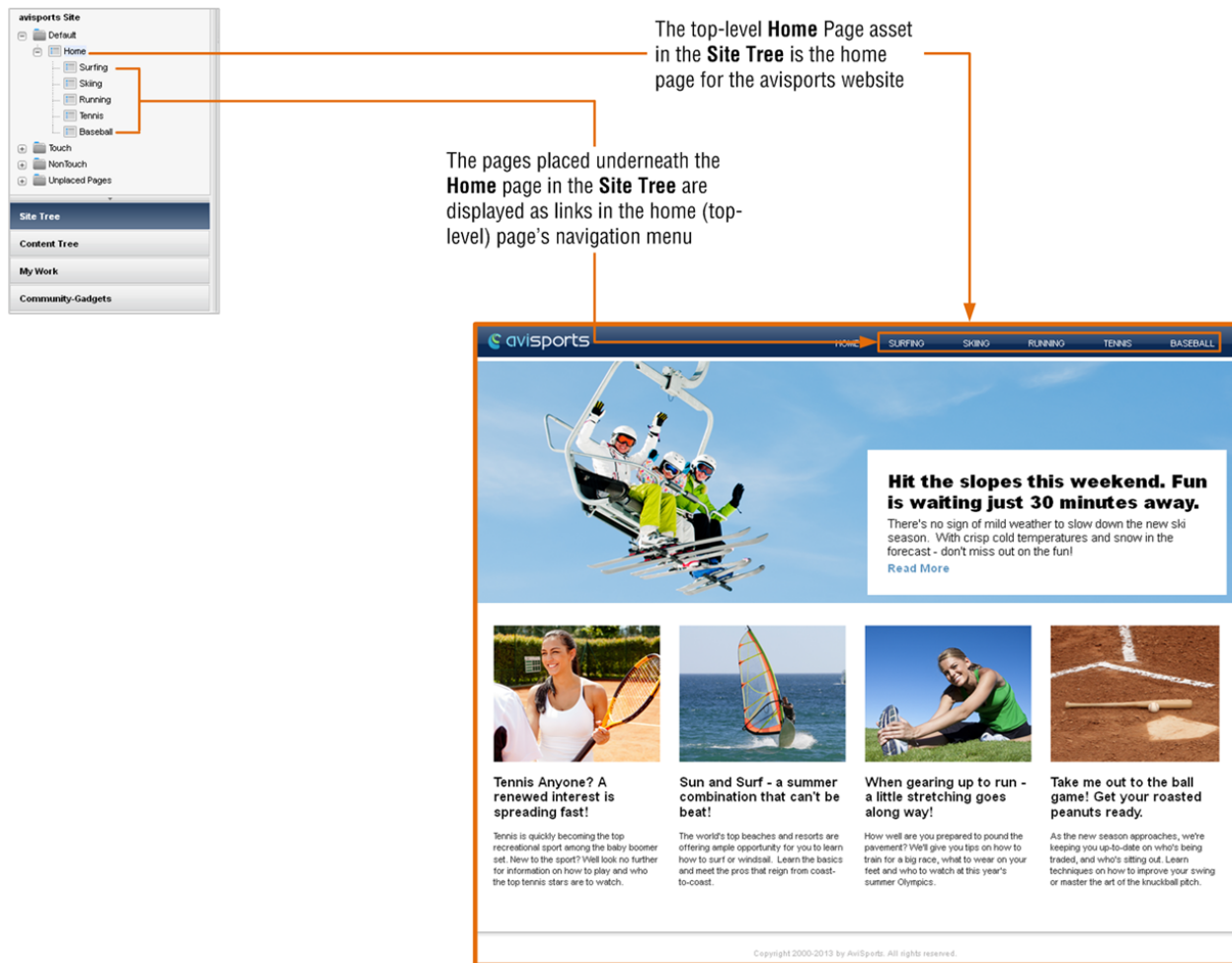
10.2 Placing and Unplacing Pages

If you are assigned the appropriate role (configured by your administrator), you can use the **Site Tree** to place Pages under a site plan and unplace Pages (remove Pages from a site plan). Placing and unplacing Pages enables you to organize a website's navigation (as shown in Figure 10–1). The changes you make through the tree will be applied to the websites represented by the site plans during the next publishing session. For more information on Page assets, see the *WebCenter Sites Developer's Guide* or consult your developers.

Note: The **Site Tree** requires you to place pages in an ordered hierarchy. Before you perform the procedures in this section, consult your developers to familiarize yourself with the structure of your website so that you know where each page belongs in the site hierarchy.

This section covers the following procedures:

- Section 10.2.1, "Placing a Page"

- Section 10.2.2, "Unplacing a Page"

10.2.1 Placing a Page

This section shows you how to place a Page asset under a site plan in the **Site Tree**. There are two supported methods for placing Pages under a site plan:

- Directly under a top-level Page as the Page's highest-ordered sub-level.

- At the same level in the hierarchy as another Page. The selected Page is placed before or after the other Page (depending on the location you choose).

After you place a Page, you must approve and publish it in order for it to be displayed on the website.

To place a Page under a site plan

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **Site Tree** bar.

    The pane displays the **Site Tree**.

3. In the **Site Tree**, expand the desired site plan by clicking the plus sign displayed next to it. Figure 10–2 shows the **Site Tree** for the avisports sample site.

Figure 10–2   'Site Tree' for the avisports Sample Site
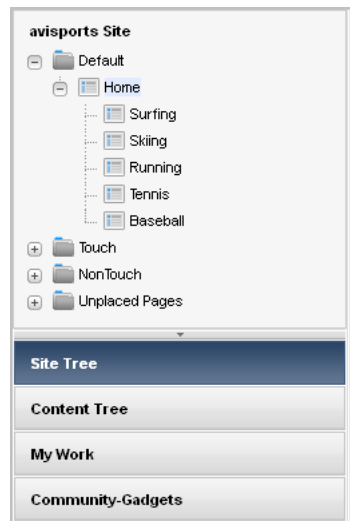
4. Find the Page you want to place and determine its target position in the hierarchy:

    a. Find the desired Page:

        –   If you are placing an already placed Page, navigate to the site plan under which it is placed.

        –   If you are placing an unplaced Page, navigate the **Unplaced Pages** hierarchy to find the desired Page.

    b. Navigate to the desired site plan to determine the Page's target position in the hierarchy.

5. Place the Page in its target position in the hierarchy. Do one of the following:

    –   To place the Page at the same level as another Page, drag the selected Page under or above the name of the other Page. The selected Page is placed in the list before or after the other Page.

For example, to place the **Running Home** Page at the same level as (and before) the **Home** Page, drag the **Running Home** Page above the name of the **Home** Page, as shown in Figure 10–3:

Figure 10–3   Place a Page Asset at the Same Level as Another Page Asset
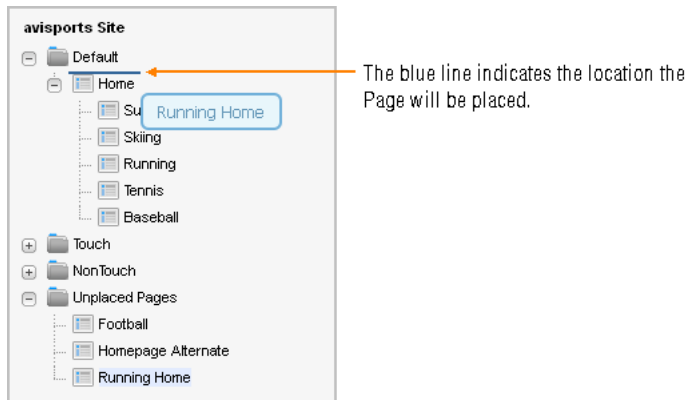
– To place the Page as the highest-ordered sub-level of another Page, drag the selected Page over the name of the desired Page under which you wish to place it.

For example, to place the **Running** Page as the highest-ordered child of the **Running Home** Page, drag the **Running** Page over **Running Home**, as shown in Figure 10–4:

Figure 10–4   Place a Page Asset as the Highest-Ordered Child of Another Page Asset
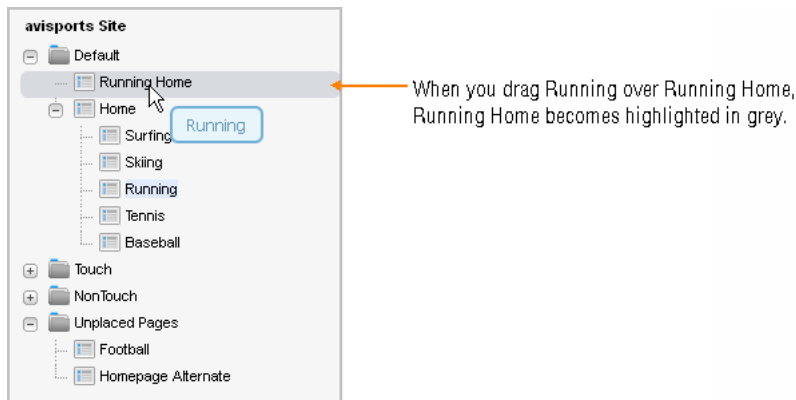
You must approve the Page you placed in order for the website to be updated with your changes during the next publishing session.

10.2.2 Unplacing a Page

This section shows you how to unplace a Page asset — that is, mark it for removal from the website. After you unplace the Page, it will be removed from the website during the next publishing session.

To unplace a page

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **Site Tree** bar.

   The pane displays the **Site Tree**.

3. In the **Site Tree**, expand the site plans and **Unplaced Pages** node by clicking the plus-sign next to each node.

4. Navigate the desired site plan to find the Page you want to unplace.

5. Unplace the Page by dragging it over the **Unplaced Pages** node. For example, to unplace the **Running Home** Page, drag it over the **Unplaced Pages** node, as shown in Figure 10–5:

Figure 10–5   Unplace a Page Asset
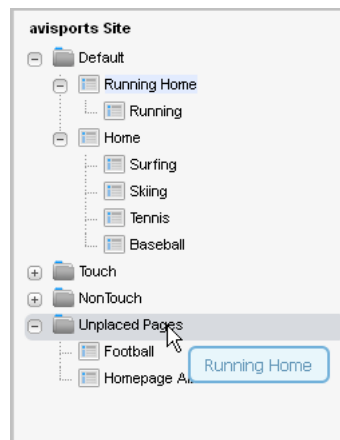
When you release the Page, it is displayed under the **Unplaced Pages** node. If the Page you unplaced contains sub-levels, its sub-level Pages are also unplaced, as shown in Figure 10–6.

Figure 10–6   Page Assets Displayed Under the 'Unplaced Pages' Node
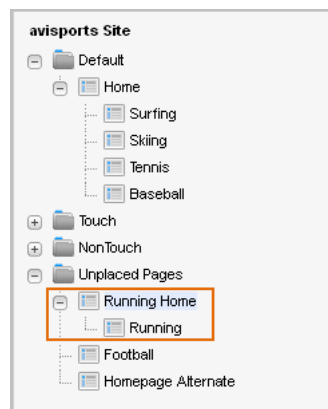
You must approve the unplaced Page in order for the website to be updated with your changes during the next publishing session.

10.3 Creating a Website's Navigation by Copying an Existing Navigation

If the **Site Tree** contains multiple site plans, instead of creating brand new content to place under a site plan, you can copy the navigation (placed Pages) under one site plan

and paste the navigation under another site plan. You can either copy a site plan's entire navigation or a sub-set of its navigation. Once you paste the navigation under the desired site plan, both site plans will display the same placed Pages. However, each site plan's content is managed individually. When you make changes to the content of one site plan, those changes do not apply to any other site plan's content.

To create a website's navigation by copying an existing website's navigation

1. Log in to WebCenter Sites, select the site you want to work with, and then select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **Site Tree** bar.

    The pane displays the **Site Tree**.

3. In the **Site Tree**, expand the site plan whose navigation (placed Pages) you wish to copy by clicking the plus sign displayed next to the site plan.

4. In the expanded site plan tree, right-click the highest-ordered Page in the hierarchy from which you wish to copy the navigation. In the context menu, select **Copy Site Navigation**.

Figure 10–7   Copy a Site Plan's Site Navigation (Placed Pages)
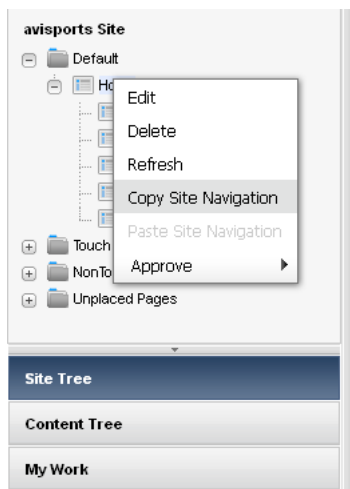
5. Paste the navigation under the desired site plan:

    a. Navigate to the site plan under which you wish to paste the copied navigation and expand its hierarchy by clicking the plus sign next to it.

    b. Right-click the site plan node (or a placed Page under the site plan node) and select **Paste Site Navigation**.

Figure 10–8   Paste a Site Plan's Site Navigation Under Another Site Plan Node
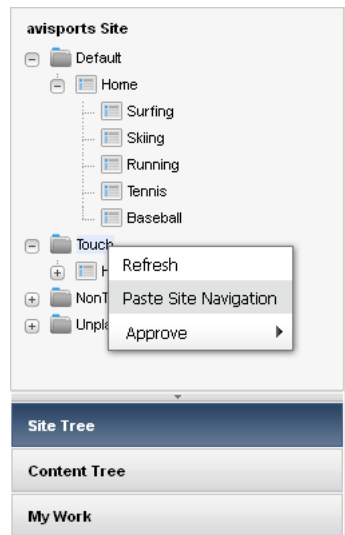
   c.   In the confirmation dialog box, click **Yes**.

Figure 10–9   Paste Site Navigation – Confirmation Dialog Box
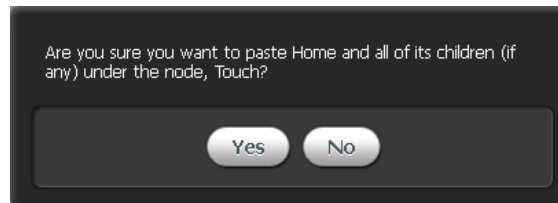
   The Page and all of its sub-level Pages are placed under the site plan node (or
   under a placed Page in the site plan's tree). For example, if you copied the
   "Home" Page from the **Default** site plan node and pasted it directly under the
   Touch site plan node, the "Home" Page and all of its sub-level Pages are placed
   under the **Touch** site plan node (as shown in Figure 10–10).

Figure 10–10   Navigation from the Default Site Plan Pasted Under the Touch Site Plan
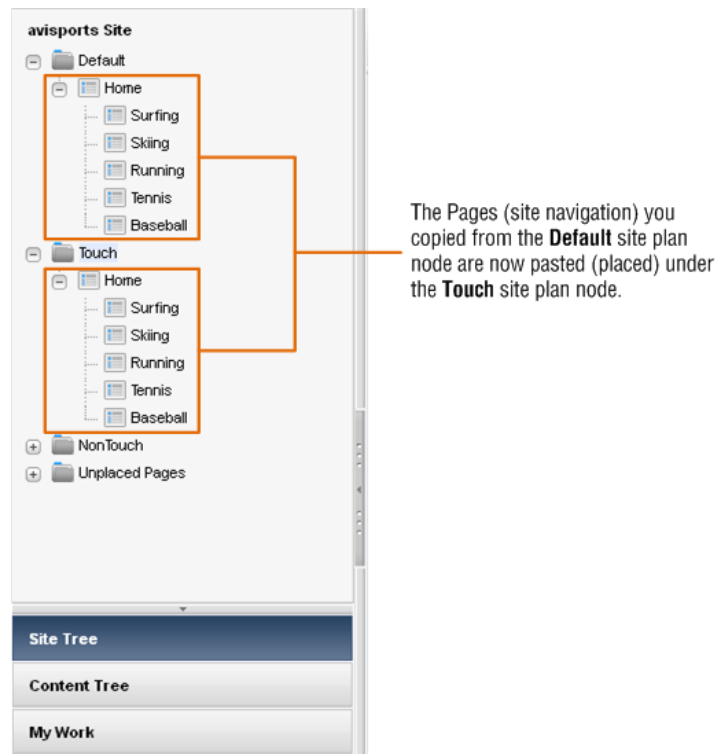
6. Edit the Pages you pasted under the site plan. For instructions, see Section 3.3, "Editing Assets in Form Mode" and Section 4.4, "Editing Assets in Web Mode." If you are editing the content for a mobile site plan, see Section 13.3, "Editing Assets in the Context of a Mobile Device."

7. Preview the changes you made to the content of the site plan. For instructions, see Chapter 7, "Previewing Assets." If you wish to preview the content in the context of a mobile device, see Section 13.4, "Previewing Assets in the Context of a Mobile Device."

8. Approve and publish the site plan. For instructions, see Section 14.2.2, "Approving a Site Plan for Publishing."

11

Working with Multilingual Assets

This chapter shows you how to work with localized assets and multilingual asset sets.

This chapter contains the following sections:

- Section 11.1, "Overview"
- Section 11.2, "Setting or Changing an Asset's Locale Designation"
- Section 11.3, "Creating a Translation of an Asset"
- Section 11.4, "Examining the Available Translations of an Asset"
- Section 11.5, "Changing the Master Asset of a Multilingual Set"

11.1 Overview

Very often, organizations maintain one or more localized websites that serve different geographic regions. Such sites will host content in one or more languages local to the region served by the site. In such cases, a piece of content can be translated to exist in multiple languages, or **locales**.

If two or more locales are set up on your site, you can translate assets into the languages that are enabled by the locales. When you create the first translation of an asset, the asset and its translation become a **multilingual set**, and the source asset is automatically designated as the **master asset** of the set. Once an asset is designated as the master of a set, it remains so until you designate another member of the set as the master.

You can create subsequent translations either from the master asset, or from an existing translation. The master asset and its translations are linked to one another to indicate they are members of the multilingual set. Each member contains the same piece of content but in a different language. You cannot delete the master asset if at least one translation exists in the set. You will have to delete all of the translations linked to the master asset before you can delete it.

Each asset can have only one translation in each available language. For example, once a Canadian French translation of an asset exists, you cannot create another Canadian French translation within the same multilingual set.

To create a translation of an asset, you must do the following:

1. Select the target language of the translation. WebCenter Sites does the following:

   a. Creates a copy of the source asset

   b. Sets the target language of the copy according to your selection.

    c. Links the copy to the master asset and marks the copy as a translation of the master. If this is the first translation of the asset, a multilingual set is created and the source asset is designated as the master.

2. Translate the source content and store the translated content in the translation asset.

3. (Optional) Translate the assets associated with the source asset and associate the translated versions with the translation of the source asset. See the following table for information on how asset relationships are handled when you create translations of assets.

> **Note:** Before performing the procedures in this chapter, note the following:
>
> - Your WebCenter Sites interface will contain locale-related functionality only if the administrator has set up your site to support multiple languages.
>
> - If you plan to work with content in a language that uses non-English characters, your machine must be configured for input and display of such characters.
>
> If you have any questions, contact your WebCenter Sites administrator.

Relationship Type	Behavior
Asset Associations	When you create a translation of an asset that contains associations, all assets associated with the source asset are automatically associated with the translation. You then have the choice to translate the associated assets and associate the translated versions with the translated parent asset.
Static Lists Recommendations	When you create a Static Lists recommendation in a new locale, the new "Recommendation" asset retains the member assets of the source asset. You then have the choice to translate the member assets and place the translated versions in the new "Recommendation" asset, replacing the member assets carried over from the old collection.
Asset-Type Attributes	When an asset containing associations through asset-type attributes is translated, all assets associated with the source asset are automatically associated with the translation. You then have the choice to translate the associated assets and associate the translated versions with the translated parent asset.
Embedded Links	Embedded links are not affected. When an asset containing embedded links is translated, you must manually update the links to point to the corresponding translations of the linked content (if they exist).

For more information, see Section 8.1, "Working with Asset Associations."

> **Note:** If you want to share a localized asset to another site, the locale assigned to the asset must be enabled on the target site. If you have questions about locales, contact your WebCenter Sites administrator.

11.2 Setting or Changing an Asset's Locale Designation

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.)

If you want to create a translation of an asset that has no locale designation, follow the steps below, then continue on to step 5 of Section 11.3, "Creating a Translation of an Asset."

You can also change the locale designation of an asset that already 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. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose locale designation you want to set or change. Do one of the following:

   – Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      b. In the list of search results, click the name of the desired asset.

   – If you previously bookmarked the asset, open it from the **Bookmarks** node:

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

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

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

   a. If the asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

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

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

   d. In the "Locale" drop-down menu, select the desired 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 Mode. When you inspect an asset, you cannot modify its content.

6. (Optional) If your next step is to create a translation of the asset, proceed to step 5 of Section 11.3, "Creating a Translation of an Asset."

11.3 Creating a Translation of an Asset

> **Note:**
>
> ■   Before you can create a translation of an asset, the asset must have a locale designation already assigned to it. (The asset's locale is listed in the **Metadata** section of the asset form and is typically assigned by the user who creates the asset.) If the asset does not have a locale designation, follow the steps in Section 11.2, "Setting or Changing an Asset's Locale Designation," then skip to step 5 of this procedure.
>
> ■   If you are creating the first translation of an asset, you are automatically creating a multilingual set consisting of the source asset and the translation. The source asset will be automatically designated as the master asset of the multilingual set.

To create a translation of an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose translations you want to examine. Do one of the following:

   –   Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      b. In the list of search results, click the name of the desired asset.

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

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

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

3. If the asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

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

5. Set the target language of the translation. In the "Translations" field (shown in Figure 11–1), select the **Translate** link in the desired locale's "Action" column.

Figure 11–1   'Translations' Field in the 'Metadata' Section of an Asset's Form

---

Note: If the "Translations" field is not displayed, stop here. You do not have the permissions to translate the asset, or your site has less than two locales set up. If you have questions about locales or your permissions, contact your WebCenter Sites administrator.

A new tab opens displaying the translated asset's Create view. The translated asset's name is displayed in the tab as "Translation of (*new locale*) *Asset Name_ randomly generated number*."

If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, you will see the "Choose Assignees" dialog box (shown in Figure 11–2).

Figure 11–2 'Choose Assignees' Dialog Box
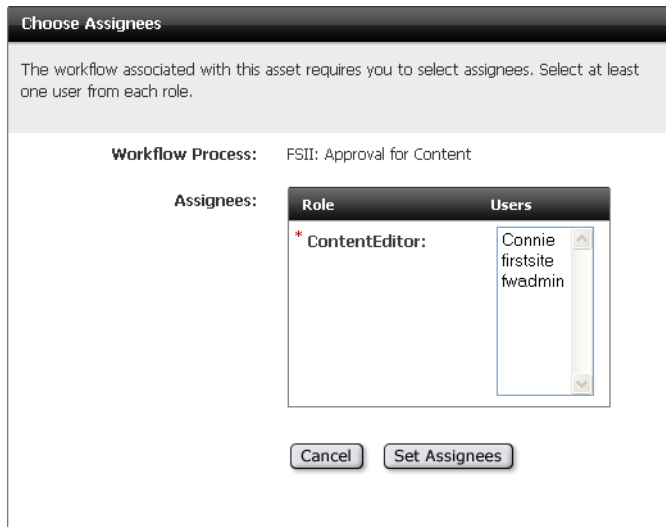
Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process. For more information, see Chapter 16, "Workflow."

6. In the translation's Create view, do the following:

   a. In the **Name** field, replace the asset's system generated name with a name that uniquely identifies the new asset as a translation of the source asset.

   Note the following conventions when naming the asset:

   – The name must be between 1 and 64 alphanumeric characters.

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

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

   b. Translate the asset as follows:

   Save your work as you go. Click the **Save** icon to save your progress as you work on the asset. When you click the **Save** icon, WebCenter Sites commits the changes to the database and keeps the asset open in its Edit view so that you can keep working.

   If any of the fields or form sections are unfamiliar to you, consult your developers or WebCenter Sites administrator.

   a. For each field, replace the copied content with an appropriate translation. See step b in Section 3.1.2, "Creating a New Asset in Form Mode" for details on filling in the fields in the form.

   b. Select the next section in the form section selector and fill in the fields as necessary. Continue until you have populated all required sections (marked with an asterisk).

7. 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 in one or more sections

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

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

8. 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 Mode. When you inspect an asset, you cannot modify its content.

9. (Optional) 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 as described in Section 16.4, "Using Workflow Functions."

10. (Optional) If you want to see how the asset would look if it were published, you can preview it. Do the following:

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

- **b.** If the asset does not have a template assigned to it, the "Select Layout" pop-up window opens. Select the desired layout and click **Apply**.

  The tab displays the preview of the asset. For detailed instructions about previewing assets, see Chapter 7, "Previewing Assets."

- **c.** When you are finished previewing the asset, click the **Go Back** icon in the asset's toolbar.

11. Review the assets associated with the translation asset to determine which associated assets need to be translated into the target language.

- **a.** In the **Content** section of the form, navigate to the field (or fields) displaying the associated assets.

- **b.** Review the assets associated with the translated asset and determine which ones need to be translated.

  When you create a translation of an asset, the assets associated with the source asset are automatically associated with the translation asset.

  Depending on the nature of the associated assets, you may want to translate them and associate the translated versions with the translation asset you created in the previous steps. For example, an image depicting a product might not require a localized version, but a data sheet for the product will need to be translated.

  See the table in Section 11.1, "Overview" for information on how WebCenter Sites handles asset relationships with respect to multilingual assets.

- **c.** (Optional) If in step 11b you determined that one or more assets associated with the translation asset have to be translated, translate each asset requiring translation by repeating this procedure, then follow the steps in Section 8.1.2, "Associating Assets" to associate the translated versions with the translation asset you created in the previous steps.

11.4 Examining the Available Translations of an Asset

To check whether a translation of an asset exists in a specific language, open the asset and examine the "Translations" field in the **Metadata** section of the form. If the desired translation exists for a given language, you can open it by clicking its name in the "Translations" field.

To check whether a specific translation of an asset exists

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose translations you want to examine. Do one of the following:

   – Search for and open the desired asset:

      a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      b. In the list of search results, click the name of the desired asset.

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

      a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

      b. In the list of bookmarked assets, double-click the name of the desired asset.

      For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

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

3. If the asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

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

5. Examine the contents of the "Translations" field. If a translation in a given language exists, you will see the name of the translation asset displayed next to that language (as shown in Figure 11–3).

Figure 11–3   'Translations' Field Showing the Master Asset and Translation Assets
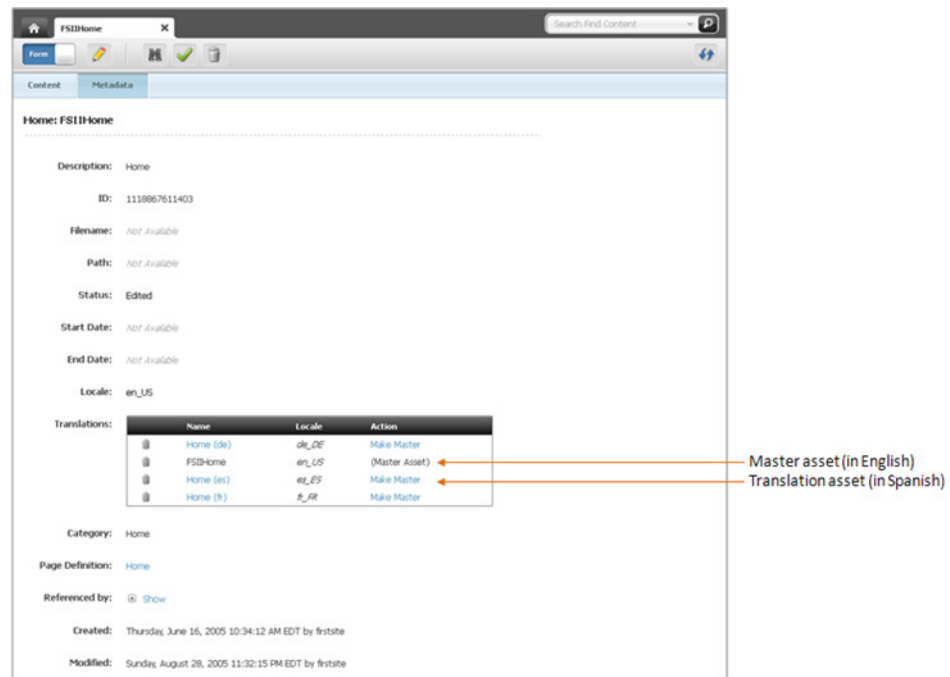
> **Note:**   If the "Translations" field does not show the name of a
> translation asset next to the desired language, the asset has not yet
> been translated into that language. You can translate the asset by
> following the steps in Section 11.3, "Creating a Translation of an
> Asset."

6. (Optional) If you want to open a specific translation of the asset for viewing, in the
"Translations" field, click the name of the desired translation asset.

11.5 Changing the Master Asset of a Multilingual Set

When you create the first translation of an asset, the source asset becomes the master
asset of a multilingual asset set consisting of the asset itself and its translation. As
more translations of the source asset are created, the multilingual set grows.

If you need to designate another member of the set as the master (for example, when
the multilingual set is copied to a site in another language), you can do so from the
Inspect view of any member of the set.

The following procedure shows you how to set a new master asset from the Inspect
view of the set's current master asset.

To change the master asset of a multilingual set

> **Note:** Note the following:
>
> ■ The master asset of a multilingual set is indicated in the "Translations" field in the **Metadata** section of the asset when it is displayed in Form Mode.
>
> ■ If a multilingual set is being revision-tracked, you must manually check out all members of the set before you can change the set's master asset. For instructions, see Section 15.2, "Checking Out Assets."

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose translations you want to examine. Do one of the following:

   – Search for and open the desired asset:

   a. In the Search field, enter search criteria identifying the asset and click the **magnifying glass** button.

   b. In the list of search results, click the name of the desired asset.

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

   a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

   b. In the list of bookmarked assets, double-click the name of the desired asset.

   For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

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

3. If the asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

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

5. In the "Translations" field, select the **Make Master** link in the desired translation asset's "Action" column.

   The tab displays the Inspect view of the new master asset in Form Mode.

12

Working with Widgets and Gadgets in the Contributor Interface

If you work with the Community and Gadgets applications, you may want to deploy widgets and gadgets directly from the WebCenter Sites Contributor interface. Now you can! If Community-Gadgets is integrated with your WebCenter Sites installation, the Community and Gadgets applications are assigned to the sites you work with, and the asset types associated with widgets and gadgets are enabled for those sites, then you can deploy widgets and gadgets to web pages while working directly in the WebCenter Sites Contributor interface.

This chapter contains the following sections:

- Section 12.1, "Overview of the Community-Gadgets Integration with WebCenter Sites"

- Section 12.2, "Accessing Widget and Gadget Assets"

- Section 12.3, "Deploying Widgets and Gadgets"

- Section 12.4, "Customizing Deployed Community and Login Bar Widgets"

12.1 Overview of the Community-Gadgets Integration with WebCenter Sites

When Community-Gadgets is integrated with WebCenter Sites, the following asset types are created:

- **CGGadget** – Asset type for all the gadgets registered to the site's Gadget Catalog. If there are no gadgets registered to the site's Gadget Catalog, then you will not see any assets of type `CGGadget` in the Contributor interface. For instructions on registering gadgets to a site gadget catalog, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

- **CGWidget** – Asset type for the community widgets, Login Bar widget, and the gadget Dashboard widget available for the site with which you are working.

- **CGPoll** – Asset type for the Polls widgets available for the site with which you are working. If there are no polls created for the site with which you are working, you will not see any assets of type `CGPoll` in the Contributor interface. For instructions on creating polls, see Section 29.3, "Creating a New Poll."

In order to work with assets of these types in the Contributor interface, the following is required:

- Your administrator must enable these asset types for your site.

- You must be assigned at least one of the following roles: `GeneralAdmin`, `SiteAdmin`, and `Designer`.

The Community-Gadgets integration with WebCenter Sites does not provide the full functionality of the Community and Gadgets applications in the Contributor interface. However, you can do the following:

- Access widget and gadget assets from the **Community-Gadgets** tree (located in the navigation pane).

- Search for assets of type `CGGadget`, `CGWidget`, and `CGPoll` using the **Search** field in the Contributor interface.

- Deploy widgets and gadgets on assets that are assigned templates your developers encoded with slots that accept assets of type `CGGadget`, `CGWidget`, and `CGPoll`.

- Customize a deployed widget instance directly from an asset's Edit view in Web Mode.

Continue with the rest of this chapter for instructions on accessing and deploying widget and gadget assets.

12.2 Accessing Widget and Gadget Assets

Widget and gadget assets can be accessed from either a search results list or the **Community-Gadgets** tree. This section provides instructions for accessing widget and gadget assets in the WebCenter Sites Contributor interface.

> **Note:** To work with widgets and gadgets in the Contributor interface, your administrator must enable the following asset types: `CGGadget`, `CGWidget`, and `CGPoll`. If you do not see any widgets or gadgets listed in the **Community-Gadgets** tree, contact your administrator.

You can access widget and gadget assets in the following ways:

- Section 12.2.1, "Accessing Widget and Gadget Assets from the 'Community-Gadgets' Tree"

- Section 12.2.2, "Accessing Widget and Gadget Assets from a Search Results List"

12.2.1 Accessing Widget and Gadget Assets from the 'Community-Gadgets' Tree

If Community-Gadgets is integrated with WebCenter Sites and the Community and Gadgets applications are assigned to the sites you work with, the navigation pane in the WebCenter Sites Contributor interface displays the **Community-Gadgets** bar (Figure 12–1). Clicking this bar displays the **Community-Gadgets** tree (Figure 12–1) which lists the available widgets (community widgets, Login Bar widget, Poll widgets, and the gadgets Dashboard widget) for the site and all of the gadgets that are registered to the site's Gadget Catalog.

Figure 12–1   'Community-Gadgets' Tree
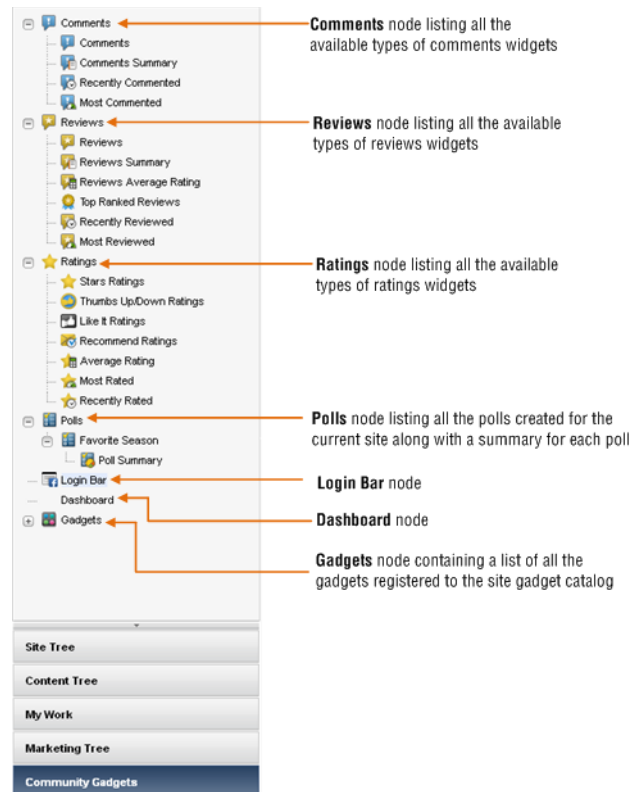
To access widget and gadget assets from the 'Community-Gadgets' tree

1. Log in to WebCenter Sites, select the site you want to work with and the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **Community-Gadgets** bar.

    The navigation pane displays the **Community-Gadgets** tree (Figure 12–1).

3. Browse the assets in the **Community-Gadgets** tree by doing the following:

    –   Click the plus-sign next to a node to expand the node and display its associated widget or gadget assets.

    –   Double-click a node to open a "Browse" tab that lists all of the node's associated widget or gadget assets.

    > **Note:**   There is only one **Login Bar** widget and one **Dashboard** widget. Therefore, neither of these nodes contain any associated widget or gadget assets.

4. (Optional) To refresh the **Community-Gadgets** tree, right-click anywhere in the tree to open the context menu, and then click **Refresh Pane**.

12.2.2 Accessing Widget and Gadget Assets from a Search Results List

This section provides instructions for using the **Search** field in the Contributor interface to search for assets of type `CGGadget`, `CGWidget`, and `CGPoll`.

To access widget and gadget assets from a search results list

1. Log in to WebCenter Sites, select the site you want to work with and the icon for the WebCenter Sites **Contributor** interface.

2. In the **Search** field, enter search criteria for the desired widget or gadget, and then click the down-arrow to render the "Search Type" drop-down box:

   – If you are searching for a widget (community widget, gadget Dashboard widget, or Login Bar widget), select **Find CGWidget**.

   – If you are searching for a gadget, select **Find CGGadget**.

   – If you are searching for a Polls widget, select **Find CGPoll**.

   > **Note:** To find assets of type `CGWidget`, `CGGadget`, or `CGPoll`, you cannot search across all asset types in the Contributor interface. The search results will not include assets of these types.

3. Click the **magnifying glass** button.

   – If you are not currently working with any assets, WebCenter Sites displays the search results in a "Search" tab.

   – If you are currently working with an asset, the search results list is automatically docked to the right of the workspace.

   For more information about searching for assets, see Chapter 6, "Finding and Organizing Assets."

12.3 Deploying Widgets and Gadgets

This section provides instructions for using the Contributor interface to deploy widget and gadget assets to your website.

To deploy widgets and gadgets on web pages

1. Log in to WebCenter Sites, select the site you want to work with and the icon for the WebCenter Sites **Contributor** interface.

2. Open the asset on which you wish to deploy the widget or gadget. (If you need to create the asset, see Section 3.1, "Creating Assets in Form Mode.")

   > **Note:** The asset you open (or create) must be assigned a template that has been encoded with slots that accept assets of type `CGGadget`, `CGWidget`, and/or `CGPoll`. If you have any questions, see your template developers.

3. Find the widget and/or gadget you wish to deploy:

   ■ For instructions on accessing assets from the **Community-Gadgets** tree, see Section 12.2.1, "Accessing Widget and Gadget Assets from the 'Community-Gadgets' Tree."

   ■ For instructions on searching for widget and gadget assets, see Section 12.2.2, "Accessing Widget and Gadget Assets from a Search Results List."

4. Deploy the desired widget or gadget on the asset you opened in step 2:

a. In the search results list or **Community-Gadgets** tree, click the name of the widget or gadget and drag it to the desired field (Form Mode) or slot (Web Mode).

If the slot supports widgets and gadgets, when you drag the widget or gadget to the slot, a dashed green border is displayed around the slot.

b. Drop the widget or gadget into the field (or slot) by releasing the mouse button.

Figure 12–2 shows an asset in Form Mode displaying the Comments widget in a field. Figure 12–3 shows an asset in Web Mode displaying the Comments widget in a slot.

Figure 12–2 Comments Widget Deployed on an Asset Displayed in Form Mode

Figure 12–3   Comments Widget Deployed on an Asset Displayed in Web Mode
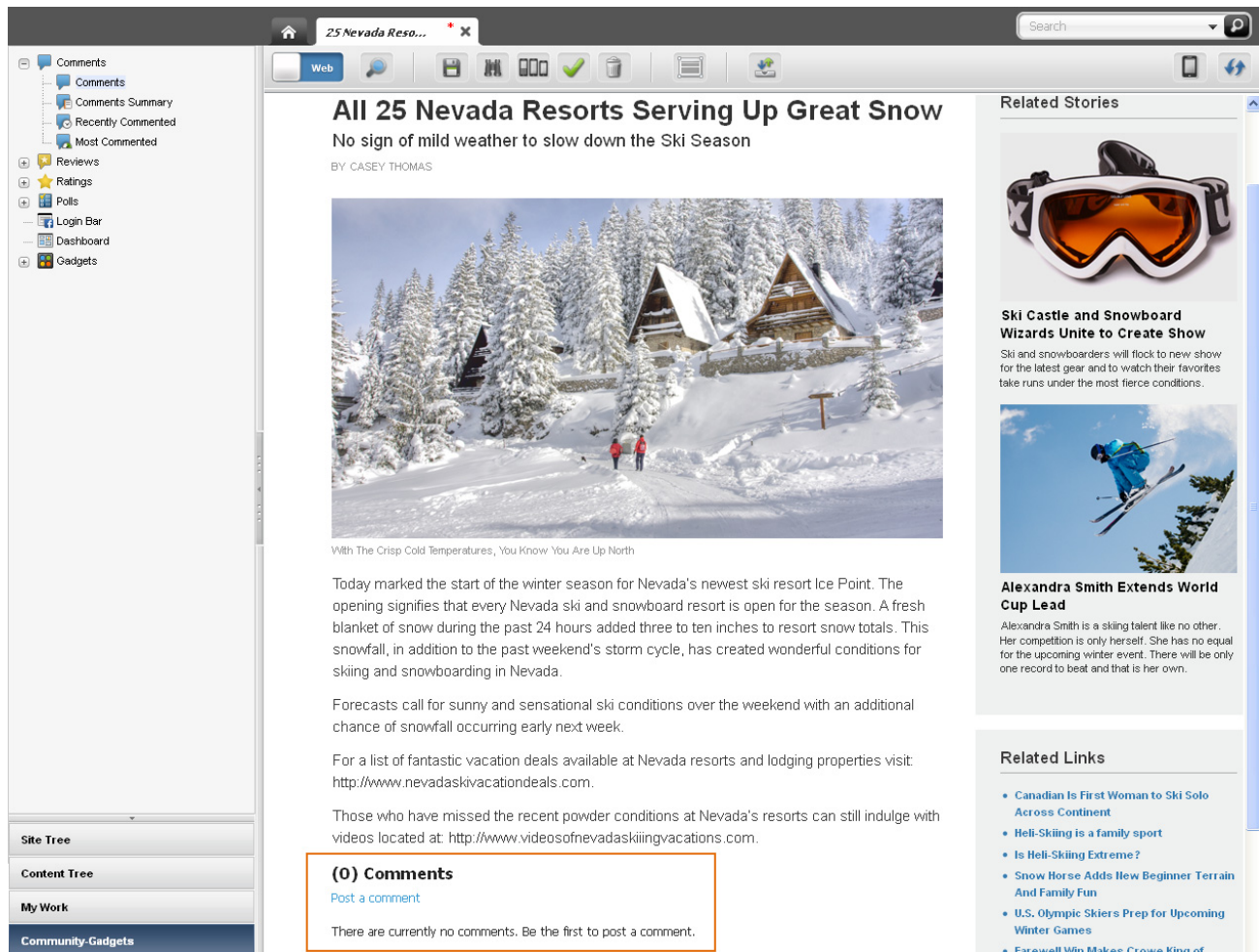
5. Save your changes by clicking the **Save** icon in the asset's toolbar.

6. To inspect the asset, click the **Inspect** icon in the asset's toolbar.

    The tab displays the asset in its Inspect view. You cannot modify the asset in its Inspect view.

7. If you wish to customize a deployed widget instance, see Section 12.4, "Customizing Deployed Community and Login Bar Widgets."

8. Publish the asset on which you deployed the widget or gadget. For instructions, see the publishing chapters in the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

12.4 Customizing Deployed Community and Login Bar Widgets

When working in Web Mode, you can customize deployed community and Login Bar widget settings directly in the Contributor interface. If the widget instance is customizable, the slot toolbar of the slot into which you placed the widget, displays a **Settings** icon. Clicking the **Settings** icon opens a pop-up which displays the widget's custom settings screen.

> **Note:** The custom settings screen for the widget instance you deployed displays custom fields that apply only to that widget instance.

To customize a deployed community or Login Bar widget

1. Log in to WebCenter Sites, select the site you want to work with, and then select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset on which you deployed the widget you wish to customize.

   a. In the **Search** field, enter search criteria identifying the asset and then click the **magnifying glass** button.

   b. In the search results list, click the name of the asset on which you deployed the widget you wish to customize.

   A tab opens displaying the asset in either Form Mode or Web Mode.

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

   The tab re-displays the asset in Web Mode.

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

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

5. Customize the deployed widget's settings:

   a. Navigate to the slot containing the widget whose settings you wish to customize.

   b. Click in the slot to open the slot's toolbar, and then click the **Edit** option.

   The widget's custom settings window opens (as shown in Figure 12–4).

Figure 12–4 'Comments Settings' Window

c. In the widget's custom settings window, enter the desired value for each field. The fields you see are the same fields displayed in the widgets deployment screen in the Community interface. For more information about the fields in a widget's deployment screen, see the following sections:

   – Section 25.4.3, "Custom Widget Tag Deployment Screens"

   – Section 26.4.3, "Custom Widget Tag Deployment Screens"

   – Section 27.4.2, "Deploying Custom Ratings Widget Tags"

   – Section 28.3, "Deploying a Login Bar Widget Tag"

d. Click **Save**.

The changes you make are applied only to this instance of the widget. If you wish to modify the site wide settings of a particular type of widget (for example, you wish to modify the site settings for all instances of the Comments widget), you must do so from the Community interface. For instructions, see Part II, "Using the Community Application."

6. Save and close the asset. In the menu bar, select **Content**, and then select **Save and Close**.

13

Creating Mobile Websites

WebCenter Sites: Mobility enables you to create websites for mobile devices. This chapter describes how to create, copy, and edit the assets and site navigations of your mobile websites, as well as how to preview and approve your mobile websites for various devices. It includes the following sections:

- Section 13.1, "Introduction to WebCenter Sites: Mobility"
- Section 13.2, "Creating a Mobile Website"
- Section 13.3, "Editing Assets in the Context of a Mobile Device"
- Section 13.4, "Previewing Assets in the Context of a Mobile Device"
- Section 13.5, "Approving a Mobile Site Plan for Publishing"

13.1 Introduction to WebCenter Sites: Mobility

Mobility enables you to create mobile websites for various mobile devices such as iPhone, iPad, Samsung Galaxy, and Blackberry. You can create a brand new mobile website in the same manner as you create a default website for desktop/laptop computers. To help reduce your effort and site delivery time, WebCenter Sites also lets you copy the assets of any existing website for your mobile website. You can preview your mobile website so you know how your site will look on the screens of mobile devices when it is published.

For example, Figure 13–1 shows the preview of the "Surfing" Page asset for the avisports sample site displayed on the screen of the iPad 3GS mobile device (represented by a Device asset) as it would look on the screen of an actual iPad 3GS if the Page was published.

Figure 13–1   Preview of the 'Surfing' Page Asset Displayed on the Screen of a Mobile Device

Preview of the 'Surfing' Page asset displayed on the screen of the iPhone 3GS mobile device.
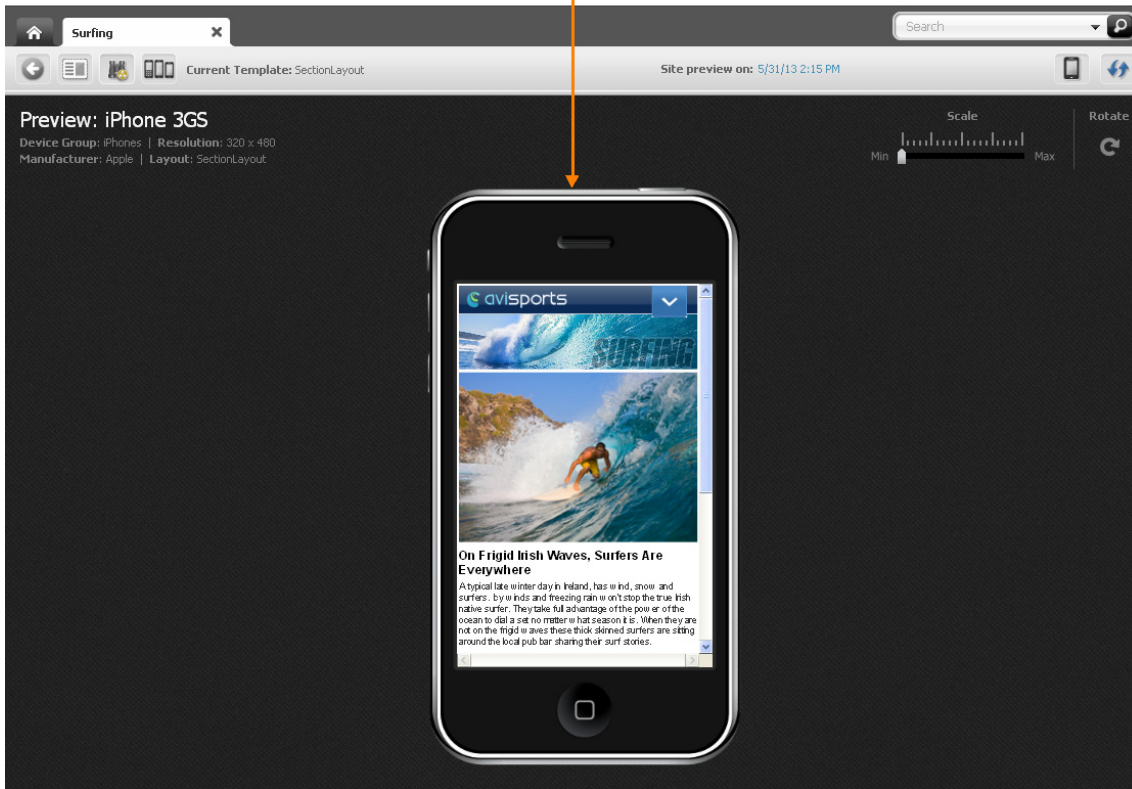
13.1.1 How Are Mobile Websites Represented in the Contributor Interface?

A mobile website, like your **Default** website for viewing on desktop/laptop devices, is represented by a site plan node in the **Site Tree** of the WebCenter Sites Contributor interface. For example, Figure 13–2 shows the **Site Tree** in the avisports sample site.

Figure 13–2   Site Plans and Navigation for the avisports Sample Site
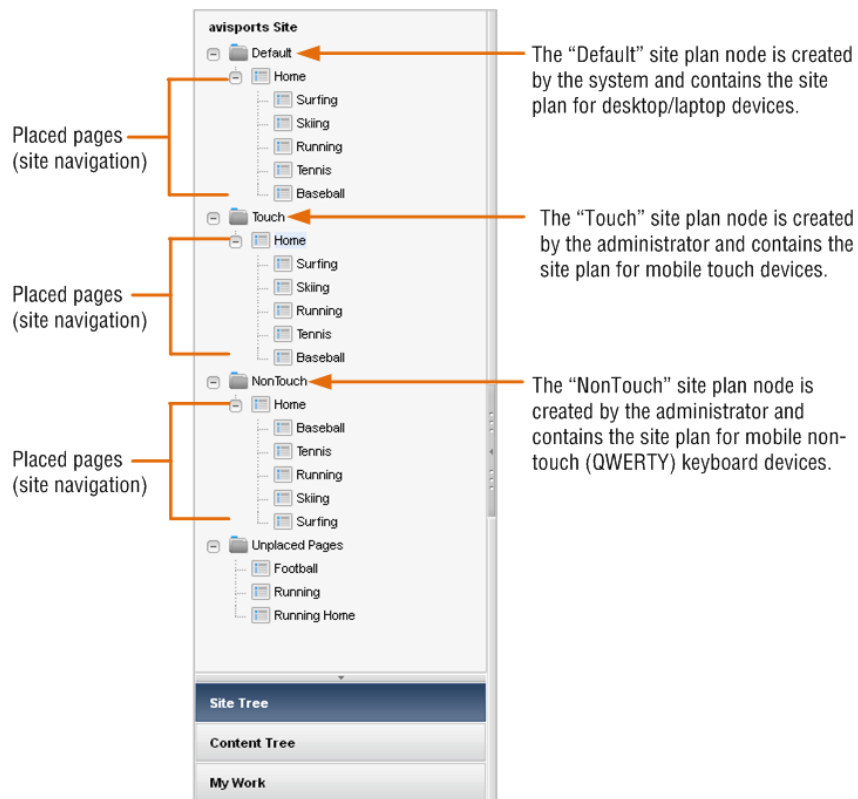
At the top of Figure 13–2 is the **Default** site plan node for desktop and laptop devices, which was created by default when the site was created. Below are the mobile site plan nodes named **Touch** and **NonTouch**. Those nodes were created by an administrator who then assigned them to Device Groups, that is a group of devices with similar features, such as a group of touchscreen phones.

In Figure 13–2, the **Touch** site plan node is assigned to Device Groups for mobile touchscreen devices. The **NonTouch** site plan node is assigned to Device Groups for mobile devices with a QWERTY keypad. Under each site plan node is a set of placed Pages which represent the site navigation. Whereas administrators create the site plans, contributors place the Pages. Placed Pages can be viewed and edited in the context of a mobile device.

13.1.2 How Do I Create Mobile Websites?

To create mobile websites, you create a mobile site plan (site navigation) under a mobile site plan node by placing Pages. You can either create new content assets and Pages or copy and edit existing content assets and Pages. For more information, see Section 13.2, "Creating a Mobile Website."

13.1.3 How Do I Edit Mobile Websites?

You can edit the Page and content assets of your mobile website just as you would for the **Default** website in Form Mode and Web Mode. In addition, you have the option to edit Pages and content assets in the context of a mobile device, as described in Section 13.3, "Editing Assets in the Context of a Mobile Device."

13.1.4 How Do I Preview Mobile Websites?

You can preview the Page and content assets of your mobile website in the context of either a single mobile device or multiple mobile devices (associated with the same device group), as described in Section 13.4, "Previewing Assets in the Context of a Mobile Device."

Figure 13–3 shows the preview of the Surfing Page displayed on a single mobile device (represented by a Device asset). Figure 13–4 shows the preview of the Surfing Page displayed on multiple mobile devices (associated with the same Device Group).

Figure 13–3   Preview of a Page Asset Displayed on a Single Device
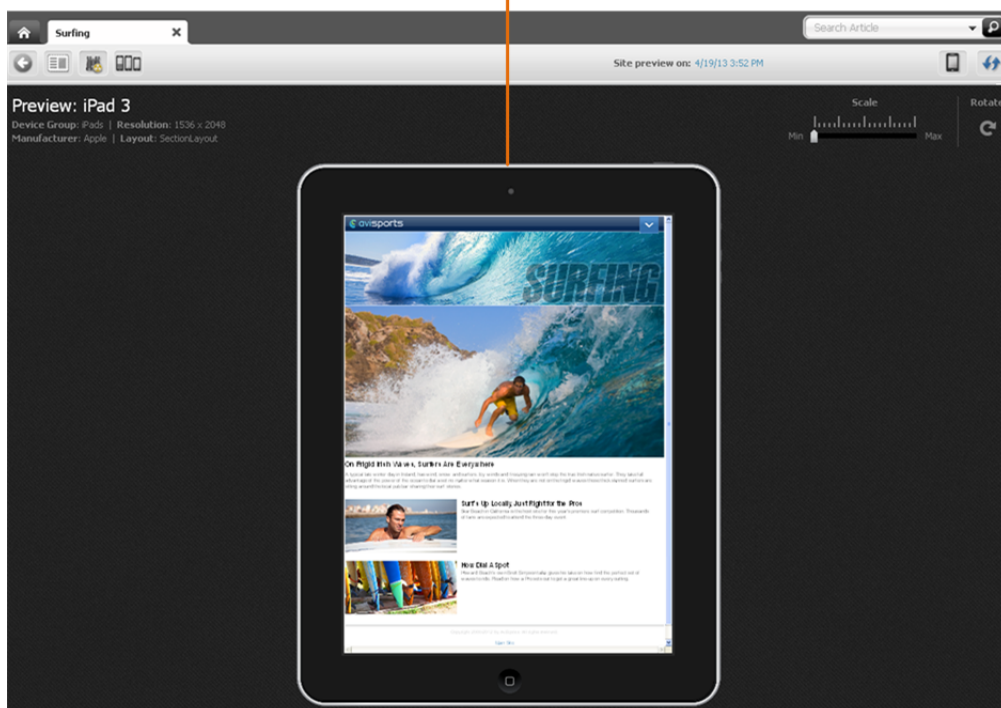
Figure 13–4   Preview of a Page Asset Displayed on Multiple Devices
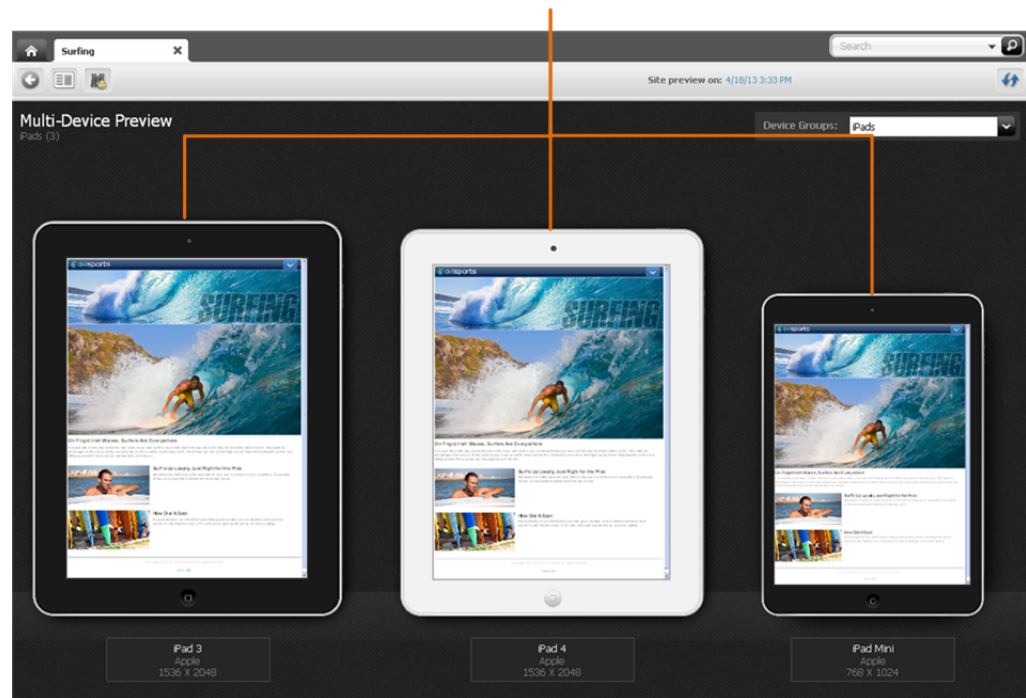
13.1.5 How Do I Approve Mobile Websites for Publishing?

To make a mobile website available for publishing, you must approve its site plan (SitePlan asset), content assets, placed Pages, and Device Groups. Since Device Groups are dependent on one another, when you approve one Device Group, you must approve them all. If you want to publish the mobile website to a management system, you must also approve all Device assets associated with that mobile website For more information, see Section 13.5, "Approving a Mobile Site Plan for Publishing."

13.2 Creating a Mobile Website

Creating a mobile website's navigation is much like creating the navigation for a default website, for viewing on desktop/laptop devices. First, you either create new assets and Pages or copy and edit existing assets and Pages for your mobile website. You then, create the mobile website's navigation by either placing the desired Pages under the mobile site plan or copying the navigation under one site plan and pasting it under the desired mobile site plan.

The following sections provide information about creating a mobile website:

- Section 13.2.1, "Create or Copy the Content for the Mobile Website"

- Section 13.2.2, "Create or Copy the Navigation for the Mobile Website"

13.2.1 Create or Copy the Content for the Mobile Website

To create the content for your mobile website, you can:

- Create new content assets and Pages. For instructions, see Section 3.1, "Creating Assets in Form Mode" and Section 4.2, "Creating Assets in Web Mode."

■ Copy existing content assets and Pages, and then edit those assets to be specific to the mobile website you are creating. For instructions on copying assets, see Section 3.1.3, "Creating Assets by Copying Existing Assets."

13.2.2 Create or Copy the Navigation for the Mobile Website

The navigation of your mobile website is determined by the placement of the "Page" assets under a site plan in the **Site Tree** of the Contributor interface. You can either place the desired Pages under the mobile site plan from the **Unplaced Pages** node, or copy the navigation under one site plan and paste it under the mobile site plan. For instructions, see Chapter 10, "Creating a Website's Navigation."

> **Note:** WebCenter Sites offers multiple ways to create a website's navigation. Your site design determines the way in which your website's navigation is created. In this section, we assume that your site design is configured to allow you to create your website's navigation using the **Site Tree** in the WebCenter Sites Contributor interface. For information about how the navigation for your website is created, see your site developers.

13.3 Editing Assets in the Context of a Mobile Device

Editing an asset in the context of a mobile device is the same as editing an asset in Web Mode, with one difference; your asset is displayed on a Device asset representing a mobile device. When you edit the asset in the context of a mobile device, you can edit its content, change the web page layout, change the content layout of a slot, and edit the asset's associations.

> **Note:** You can also edit the assets of a mobile website in Form Mode and Web Mode just as you would for an asset of your **Default** website. For instructions, see Section 3.3, "Editing Assets in Form Mode" and Section 4.4, "Editing Assets in Web Mode."

To edit an asset in the context of a mobile device

1. Log in to WebCenter Sites, select the site you want to work with and then select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to edit on a device. Depending on the type of asset you wish to edit, do one of the following:

   – (For any asset) Use the Contributor interface's **Search** feature:

   a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

   For more information and instructions about searching for assets, see Chapter 6, "Finding and Organizing Assets."

   b. In the list of search results, right-click the desired asset's name and select **Edit** from the context menu.

   A tab opens displaying the asset's Edit view in either Form Mode or Web Mode.

   – (For placed Page assets only) Use the **Site Tree** in the navigation pane:

   a. In the navigation pane, click the **Site Tree** bar.

The navigation pane displays the **Site Tree**.

b. In the **Site Tree**, expand the site plan associated with the type of mobile device on which you wish to edit the asset.

c. In the expanded site plan, right-click the desired asset and select **Edit** from the context menu.

A tab opens displaying the Page asset's Edit view in the context of a mobile device associated with the site plan.

3. Select the device on which you wish to edit the asset's content:

a. In the asset's toolbar, click the **Show/Hide Devices** icon.

The device selection panel opens to the right of the asset (as shown in Figure 13–5).

Figure 13–5   Device Selection Panel Open to the Right of an Asset
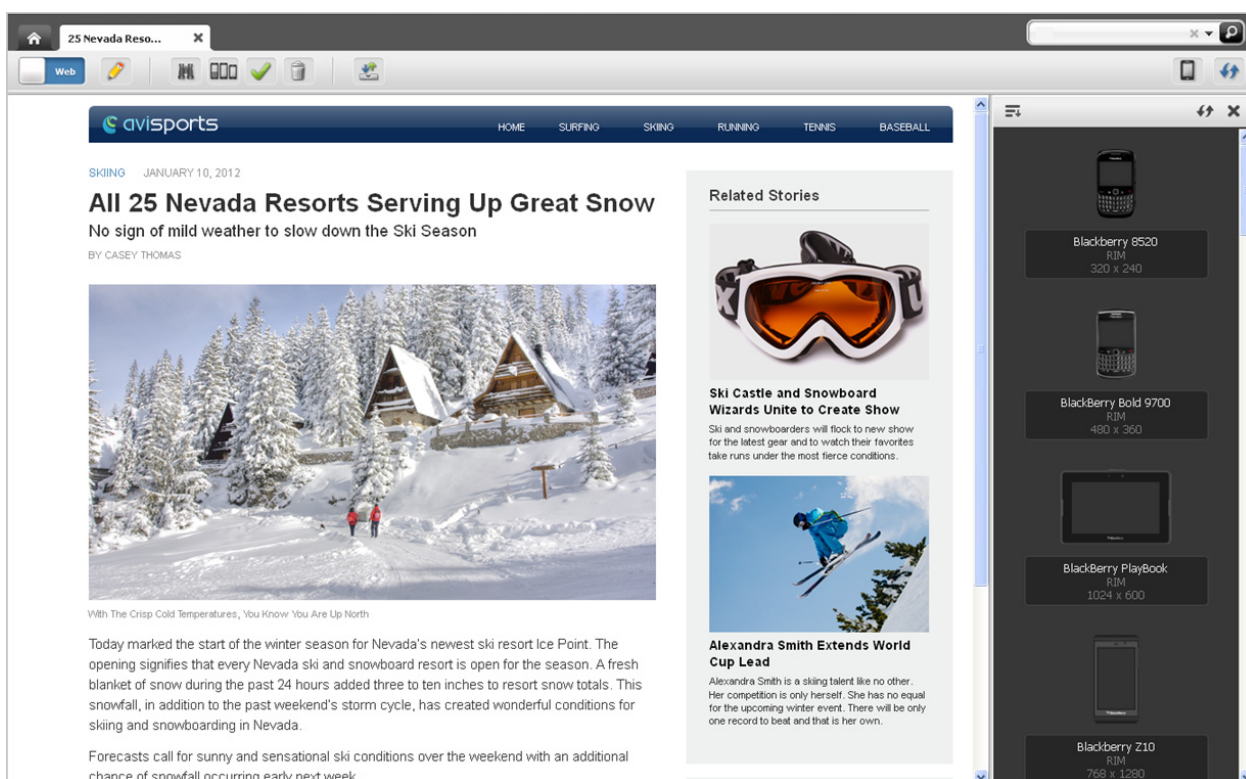
b. In the device selection panel, select the device on which you wish to edit the asset.

The Edit view of the asset is displayed on the screen of the selected device.

Figure 13–6   Asset Displayed on the Screen of a Mobile Device
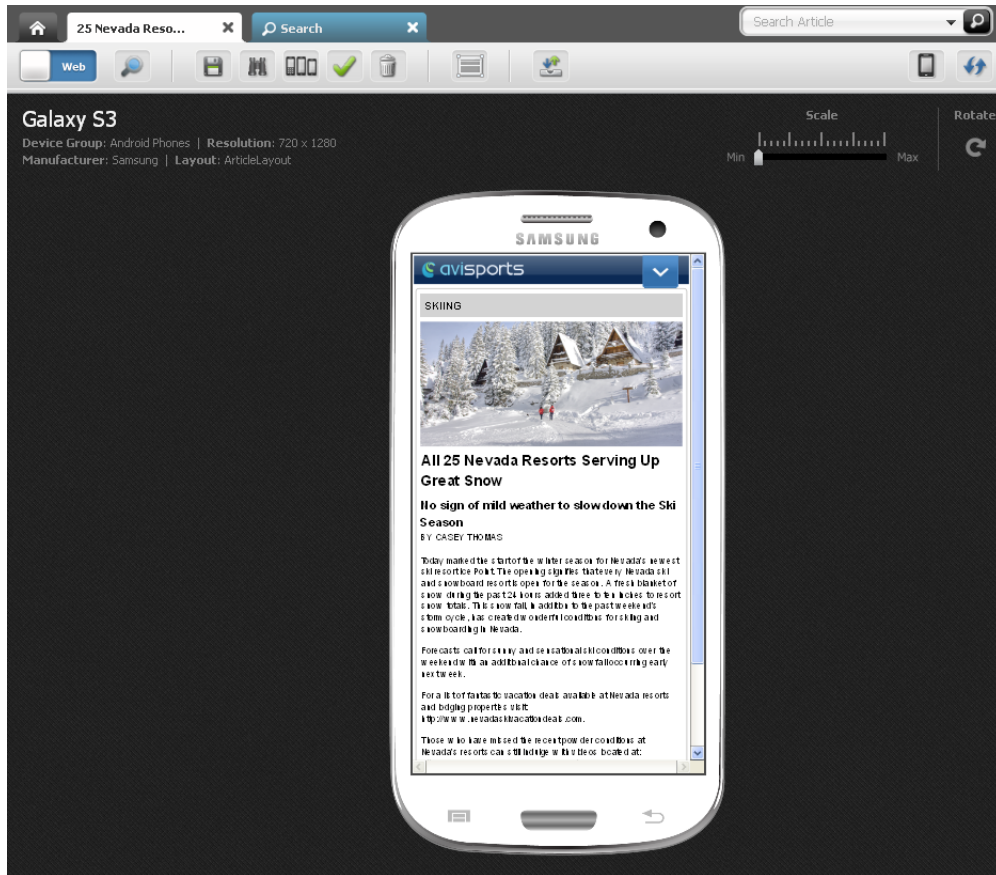
At this point, you can edit the asset as you would an asset for your **Default** website.

4. Edit the asset:

    a. Point to the different areas of the asset's Edit view to determine which areas contain modifiable content. Areas that support drag and drop functionality and other content management actions will be highlighted when you point to them.

> **Note:** The types of editable areas you will see and how those areas are displayed when you edit an asset in the context of a mobile device are determined by how your developers have coded the asset's web page layout (template). For information about web page layout, see Section 4.4.2, "Changing Web Page Layout."

Figure 13–7   Asset Displayed on a Device – Areas that Accept Content
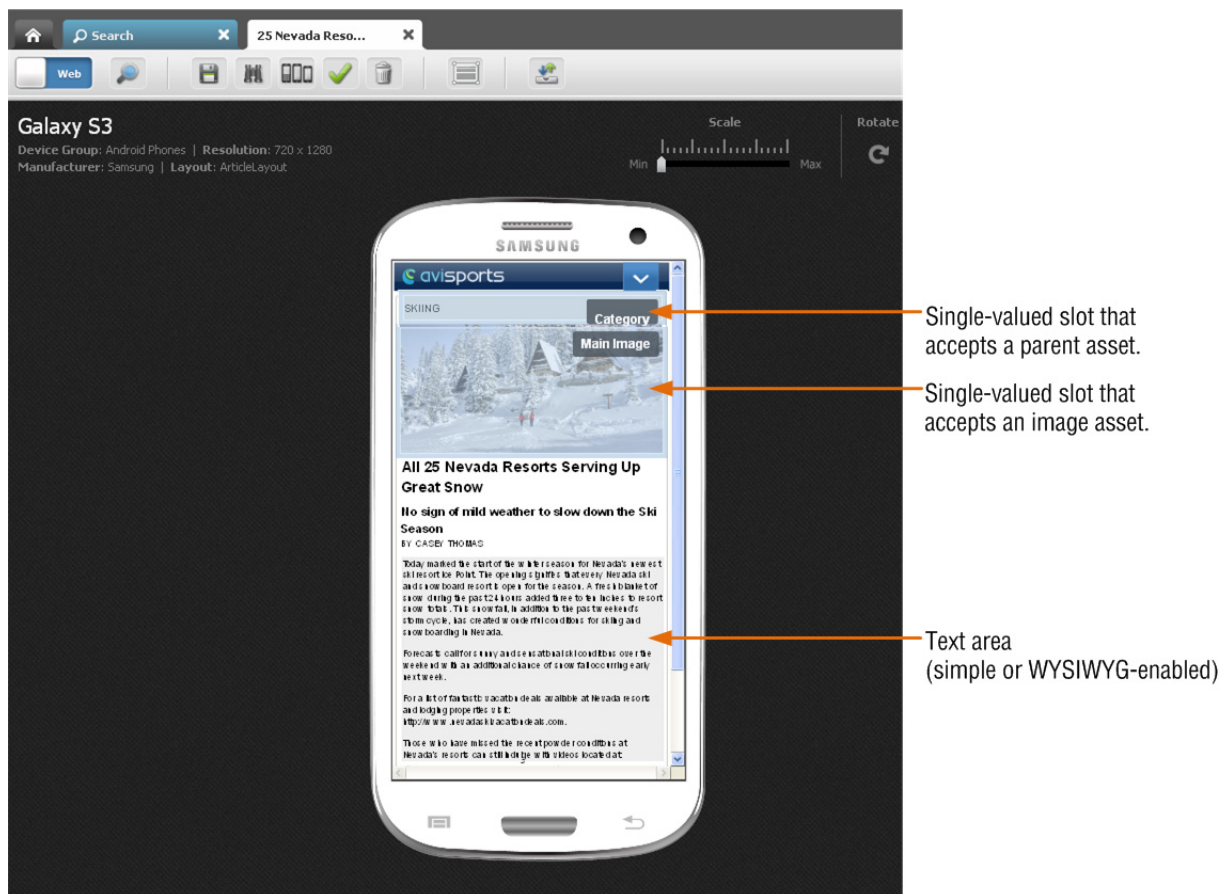
For information about the different types of editable areas you can work with, see step 7 in Section 4.2.3, "Creating a New Asset in Web Mode."

b. Edit the content of the asset by clicking in a text area to display either a simple text field or a WYSIWYG-enabled text field. Then, modify the content displayed in the field. For information about WYSIWYG-enabled fields, see Section 3.5.1, "Working with the CKEditor."

c. Change the asset's web page layout. For instructions, see step 5 in Section 4.4.2, "Changing Web Page Layout."

d. Change the content layout of a slot. For instructions, see step 5 in Section 4.4.4.2, "Editing the Content of an Associated Asset."

e. Edit the asset's associations:

– Add or replace an associated asset. For instructions, see steps 4 – 6 in Section 4.4.4.1, "Adding or Replacing an Association."

– Edit the content of an associated asset. For instructions, see steps 5 – 6 in Section 4.4.4.2, "Editing the Content of an Associated Asset."

– Remove an asset from a slot. For instructions, see step steps 5 – 6 in Section 4.4.4.3, "Removing Associations."

– Reposition the assets displayed in a multi-valued slot. For instructions, see steps 5 – 9 in Section 4.4.4.4, "Changing the Position of Content Displayed in a Multi-Valued Slot."

5. Save your changes. Do one of the following:

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

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

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

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

   – In the menu bar, select **Content**, then select **Inspect**.

7. Preview the asset in the context of a mobile device. For instructions, see Section 13.4, "Previewing Assets in the Context of a Mobile Device."

13.4 Previewing Assets in the Context of a Mobile Device

Previewing an asset in the context of a mobile device is much like previewing an asset as it would look on a desktop/laptop device, with one difference; the preview of the asset is displayed on a single Device asset or multiple Device assets which represent actual mobile devices. In addition, you can rotate the device to view the preview of the asset in landscape mode and zoom into and out of the asset's preview.

You can access an asset for preview on a mobile device the same way as you would for an asset of your **Default** website. The only difference being when you use the **Site Tree** to access a Page asset under a mobile site plan, the Page is automatically displayed in a mobile device associated with that site plan. For more information about accessing an asset's preview, see Chapter 7, "Previewing Assets."

To preview an asset in the context of a mobile device

1. Log in to WebCenter Sites, select the site you want to work with and then select the icon for the WebCenter Sites **Contributor** interface.

2. Access the asset you want to preview on a mobile device. For instructions, see step 2 in Section 13.3, "Editing Assets in the Context of a Mobile Device."

3. Preview the asset on the desired mobile device:

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

   The preview of the asset is displayed.

   b. In the asset's toolbar, click the **Show/Hide Devices** icon.

   The device selection panel opens to the right of the asset (shown in Figure 13–8).

Figure 13–8   Device Panel Displayed to the Right of an Asset
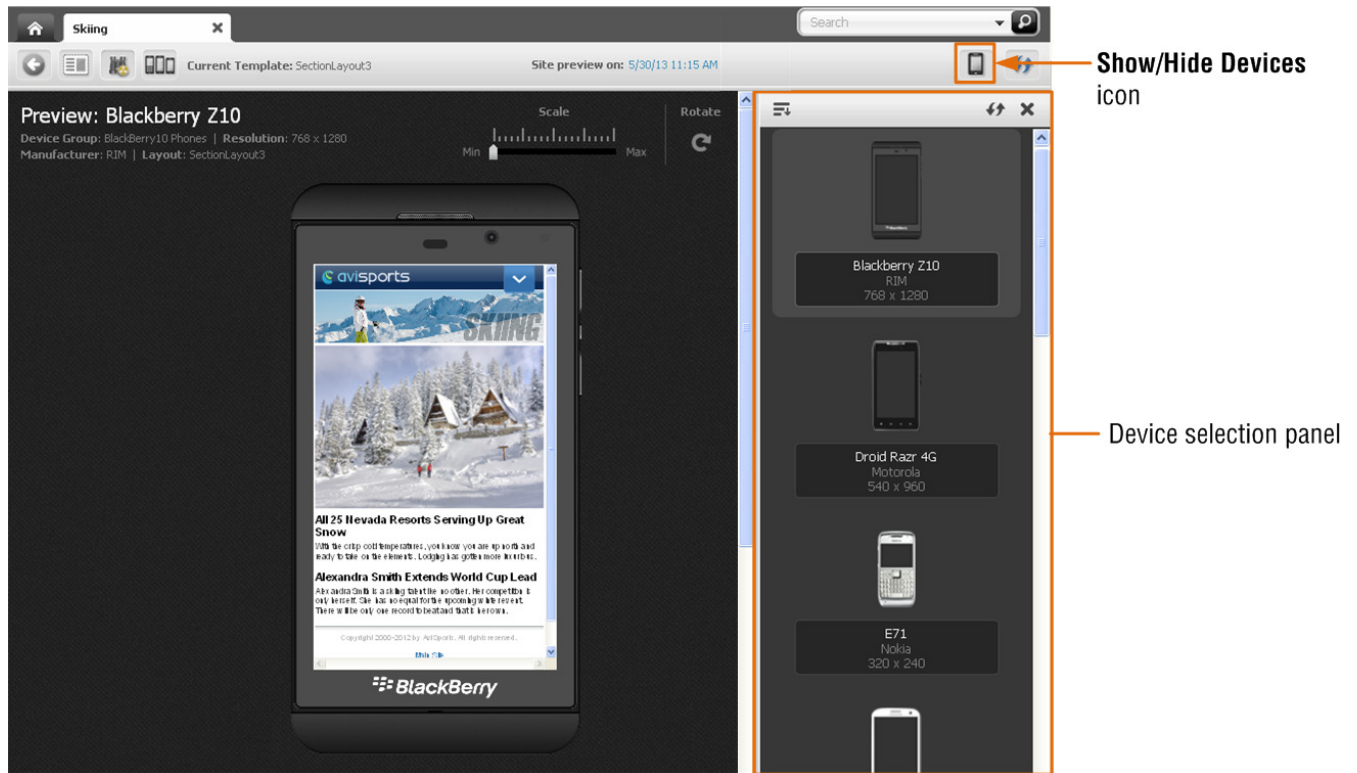
c. In the device selection panel, navigate to and select the device on which you wish to preview the asset.

> **Note:** If you accessed the asset via the **Search** function or the **Content Tree**, the panel displays a list of devices from all available Device Groups on your system. If you accessed a Page asset from the **Site Tree**, the panel displays only the devices associated with the site plan under which that Page is placed.

The preview of the asset is displayed in the context of the device you selected:

Figure 13–9   Preview of an Asset Displayed on the Selected Device
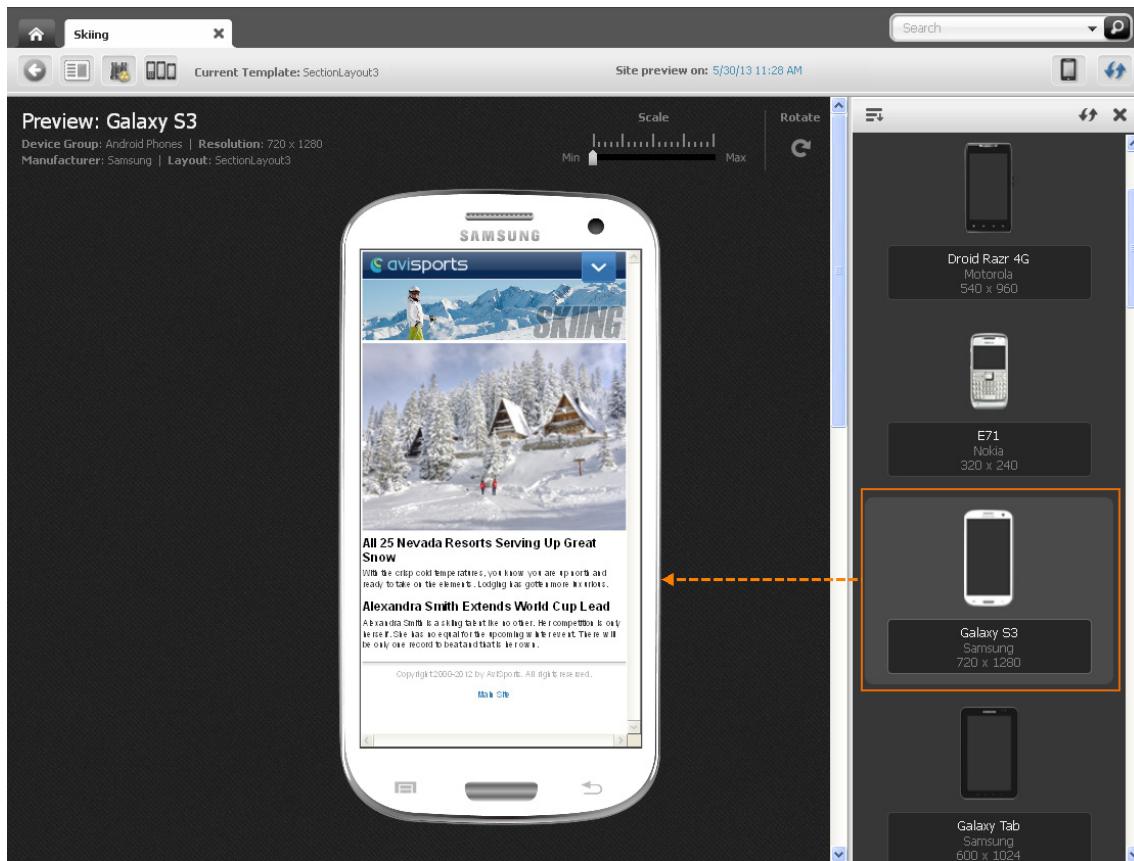
d.   (Optional) Click the **Show/Hide Devices** icon to close the device selection panel.

4.   To rotate the preview, click **Rotate**.

The preview of the asset is displayed on the mobile device in landscape mode.

Figure 13–10   Asset Preview Displayed on a Device in Landscape Mode
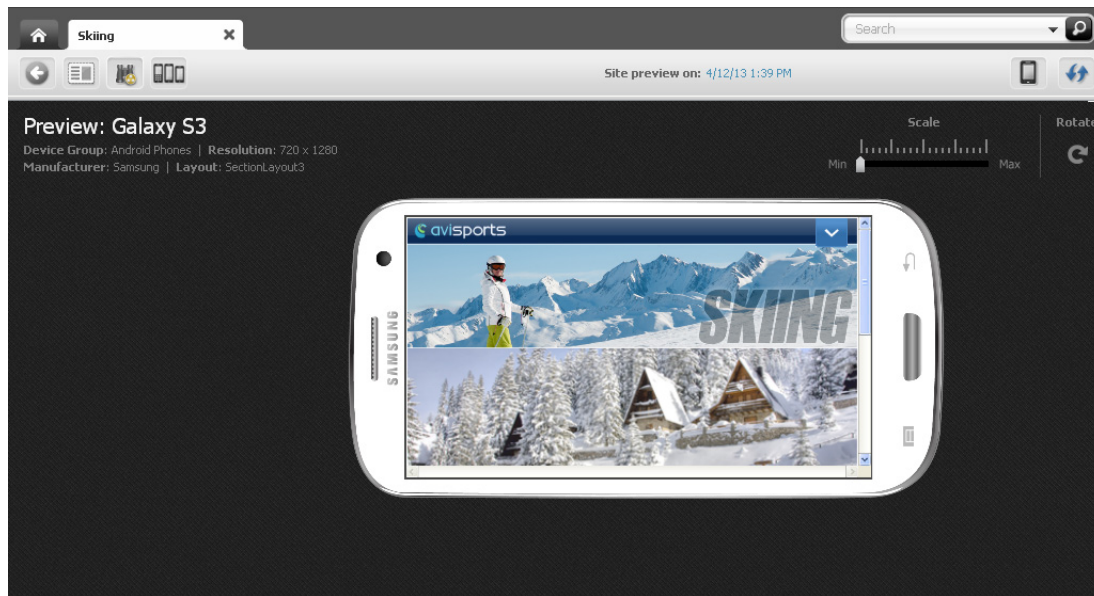
5. To preview the asset at different sizes, use the **Scale** tool to zoom into and out of the asset's preview.

Figure 13–11   'Scale' Tool

6. To preview how the asset would look on the screen of a different mobile device:

    a. If the device selection panel is not displayed, click the **Show/Hide Devices** icon to open it.

        The device selection panel is displayed to the right of the asset.

    b. In the device selection panel, select the desired mobile device.

        The preview of the asset is displayed on the screen of the selected mobile device.

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

    A new browser window opens displaying the preview of the asset in the exact pixel ratio that is configured for the device asset. For example, the Samsung Galaxy S3 device asset is configured with a 720x1280 pixel ratio. Therefore, the preview of the asset in the browser window is displayed at the exact same pixel ratio.

Figure 13–12   Preview of an Asset Displayed in a New Browser Window
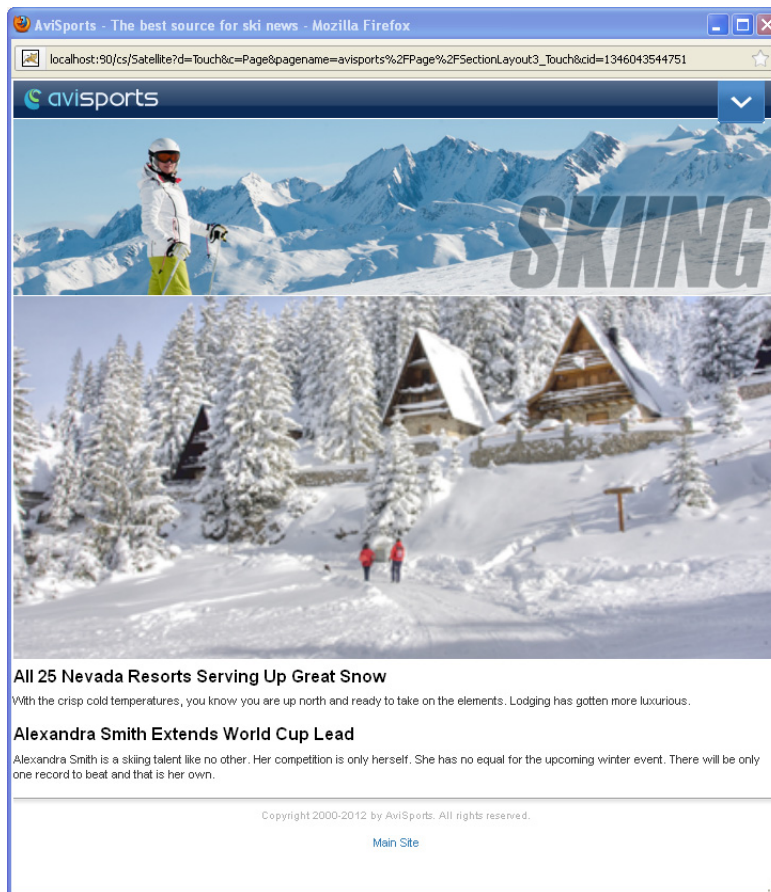
8. To preview the asset on multiple devices:

    a. Do one of the following:

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

        – In the menu bar, select **View**, and then select **Multi-Device Preview**.

    The tab displays the "Multi-Device Preview" screen.

Figure 13–13   Asset's Preview Displayed in the Context of All iPhone Devices
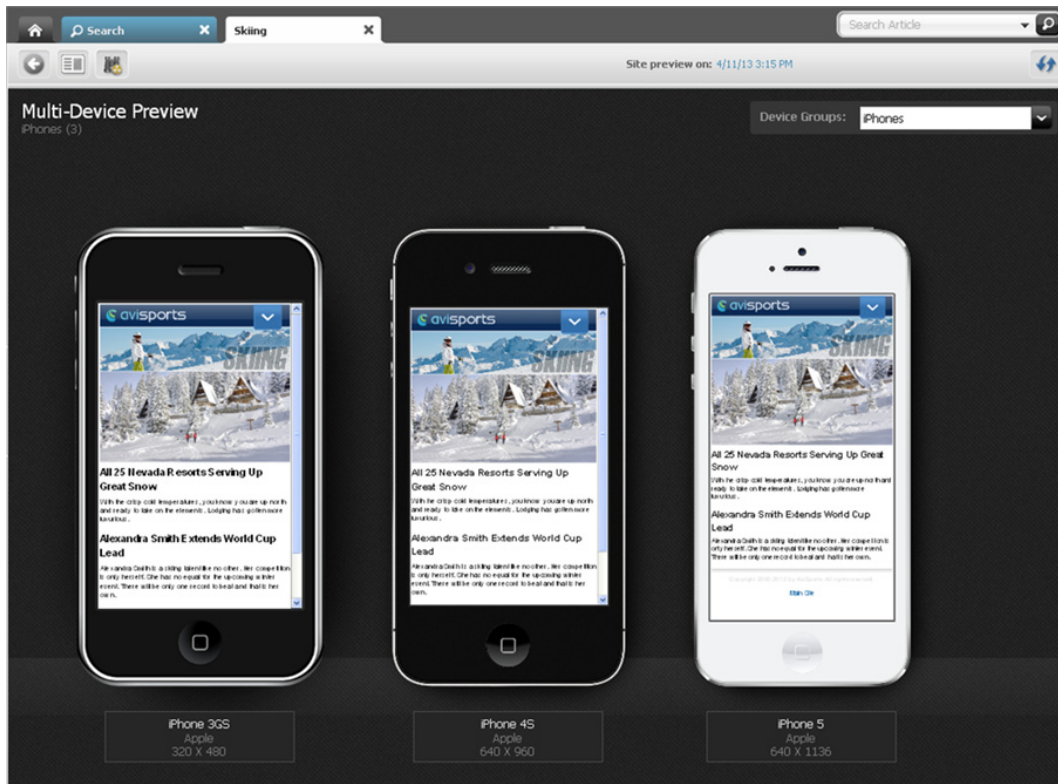
The devices that you see belong to the same device group (iPhones device group in this example). If you first previewed the asset on a single device, the "Multi-Device Preview" screen shows the preview of the asset in the context of all devices belonging to the same device group as that single device.

b. Preview the asset on the devices of a different device group. In the **Device Groups** drop-down field, click the **down-arrow** icon and then select the desired device group.

Figure 13–14   'Device Groups' Field

The "Mulit-Device Preview" screen displays the devices associated with the selected device group. In this example, we selected the "Android Phones" device group (shown in Figure 13–15):

Figure 13–15   Asset's Preview Displayed in the Context of All Android Phone Devices
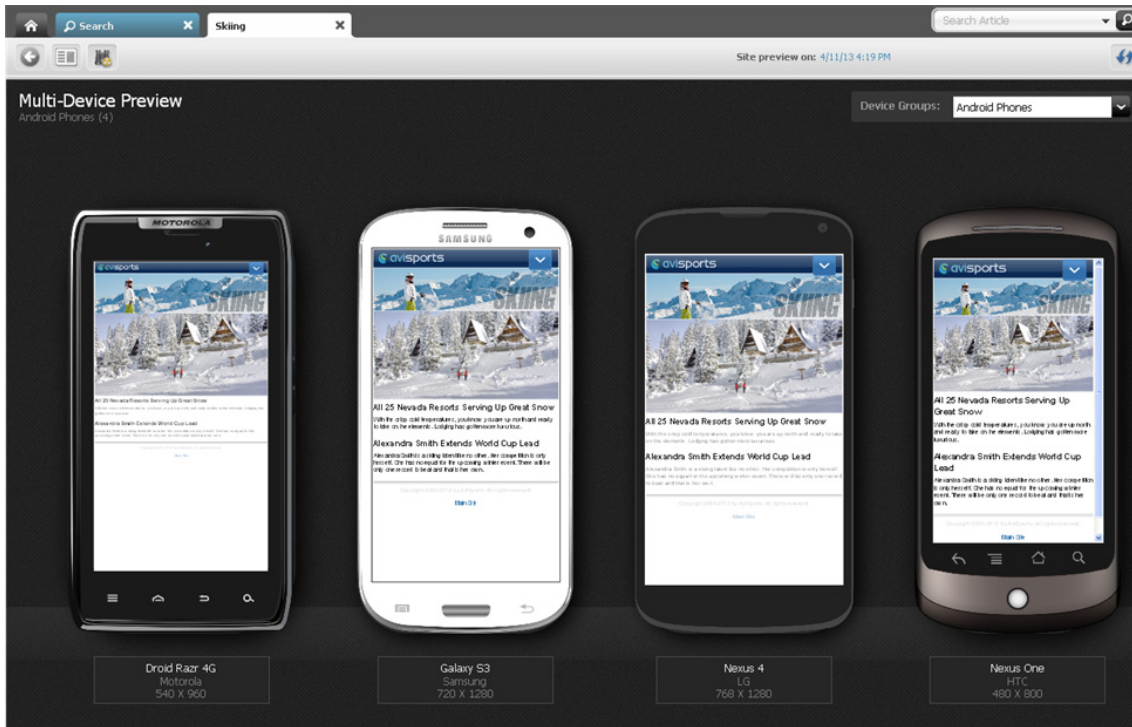
For more information about previewing assets, such as previewing an asset as it will look on the website at a future date, previewing an asset with a different page layout, or previewing an asset with segments, see Chapter 7, "Previewing Assets."

13.5 Approving a Mobile Site Plan for Publishing

Approving a mobile site plan for publishing is the same as approving a site plan for your Default website. Before a mobile website can be published, its SitePlan asset must be approved for publishing along with its placed Pages (site navigation) and associated content assets. Approving a mobile website also requires you to approve all the Device Groups on your system. Device Groups are dependent on one another – when you approve one Device Group, you must approve them all. If you are approving the mobile site plan for publishing to a management system, you must also approve the Device assets associated with that mobile site plan. For instruction on approving a mobile site plan, see Section 14.2.2, "Approving a Site Plan for Publishing."

14

Approval for Publishing

The goal of using WebCenter Sites is to publish content to a website where site visitors can read and interact with that content. Before an asset can be published, it has to be approved for publishing.

This chapter describes the procedures used to approve assets for publishing. It includes the following sections:

- Section 14.1, "Overview"
- Section 14.2, "Approval Tasks"

14.1 Overview

Before an asset can be published, it must be **approved** for publishing. Requiring approval is a safeguard against publishing an asset whose dependent assets are not ready to be published. This prevents broken links on the delivery system. You approve assets for one or more **destinations** that the administrator sets up on your site. Having multiple destinations allows for the use of multiple publishing methods. (For more information on destinations and available publishing methods, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.)

Asset approval can be either manual or automatic. You can manually approve content assets and page assets by clicking the **Approve** icon in an asset's toolbar. You can also manually approve these types of assets directly from a search results list. Form Mode enables you to approve the primary asset (asset with which you are working). Web Mode enables you to approve the primary asset and all assets displayed in the primary asset's web page view. If any of the assets you are approving have dependent assets that need approval, WebCenter Sites displays a list of dependent assets which you can then approve in bulk. Additionally, you can manually approve site plans and navigation pages (page assets) from the **Site Tree**.

Asset approval can also be automated. For example, your administrator can configure a workflow process in such a way that its final step automatically approves assets in the workflow for publishing to one or more destinations.

14.1.1 Dependencies

Dependencies are conditions that determine whether an asset can be published. An asset dependency exists when there is an association of some kind between assets. For example, a "Product" asset has an association with a "Datasheet" asset. The "Datasheet" asset has an association with three "Image" assets. Two of these images have associations with "Article" assets. This tree hierarchy forms a set of parent/child dependencies among all these assets.

The **approval status** of an asset indicates whether the asset can be safely published; that is, whether any dependency conflicts exist. An asset's approval status is determined by its dependency relationships, which include the approval status of all assets associated with a particular asset, as well as the dependency relationships of those associated assets.

> **Note:** Site plans do not have any dependent assets during the approval process.

For more information on how WebCenter Sites calculates asset dependencies during approval and publishing, see the publishing chapter of the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

14.1.2 Approval States

Because of the dependencies between assets, as well as the nature of the dependencies, approving an asset involves the concept of **approval states**. For example, "Held" is an approval state an asset enters when the asset is approved for publishing, but its dependent assets are not. In such case, the asset is then held from publishing until its dependents are approved.

The following table lists all the possible approval states of an asset and what each state means:

State	Meaning
Approved	(Informational) The asset will be published during the next publishing session to this destination, unless the asset, or one of its dependent assets (in Exact dependencies), is edited.
Held	(Action required) The asset will be held until the dependents are approved.
Needs Approval	(Action required) The asset requires approval. Click **Approve** to initiate the approval process.

If an asset enters an approval state that prevents publication, WebCenter Sites displays a list of dependent assets that require approval. Once all assets are approved, they can be published.

To learn more about the approval and publishing mechanisms employed by WebCenter Sites, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

14.2 Approval Tasks

This section provides information on the following approval tasks you can perform on an asset:

- Section 14.2.1, "Approving an Asset for Publishing"
- Section 14.2.2, "Approving a Site Plan for Publishing"
- Section 14.2.3, "Checking an Asset's Approval Status"
- Section 14.2.4, "Removing Assets from the Publishing Queue"

14.2.1 Approving an Asset for Publishing

The following procedure describes how to manually approve content assets and pages assets for publishing. Before approving an asset for publishing, you should preview it first.

To approve an asset for publishing

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to approve for publishing:

   If the asset is currently assigned to you:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of your dashboard.

      The "Assignments" section of the dashboard displays a list of all the assets that have been assigned to you.

   c. In the list of assets, click the name of the asset you wish to approve.

      WebCenter Sites opens a tab displaying the asset's Inspect view.

   If the asset is not currently assigned to you:

   a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

      For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

   b. In the search results list, do one of the following:

      – If you wish to Inspect the asset before you approve it, navigate to the desired asset and click its name.

        WebCenter Sites opens a tab displaying the asset's Inspect view (in either Form Mode or Web Mode).

      – If you wish to approve the asset from the search results list, select (**Ctrl+**click) the assets you wish to approve.

3. Select the desired publishing destination for the asset. Do one of the following:

   – In the asset or search tab's toolbar, click the **Approve** icon. In the menu that appears below the icon, select the desired publishing destination.

   – In the menu bar, select **Content**, then select **Approve**, and then *select the desired publishing destination*.

   > **Note:**
   >
   > ■ You can approve an asset for only one destination at a time; repeat this procedure to approve the asset for additional destinations.
   >
   > ■ Consult your administrator to find out where (to which destinations) and how (using which publishing method) your content is published from your system.

   One of the following happens:

- If you are approving an asset that is displayed in Form Mode or if you are approving assets from a search results list, the tab displays a table containing the details of the asset(s) you chose to approve for the selected destination (as shown in Figure 14–1).

Figure 14–1 Approval Table Displaying the Primary Asset's Publishing Details
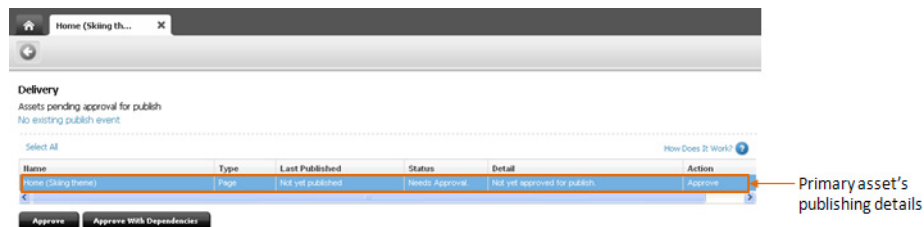
- If you are approving an asset that is displayed in Web Mode, the tab displays a table containing the primary asset's details for the selected destination along with details of all the assets displayed in the primary asset's web page view (as shown in Figure 14–2).

Figure 14–2 Approval Table Listing All Assets Displayed in the Primary Asset's Web Page View
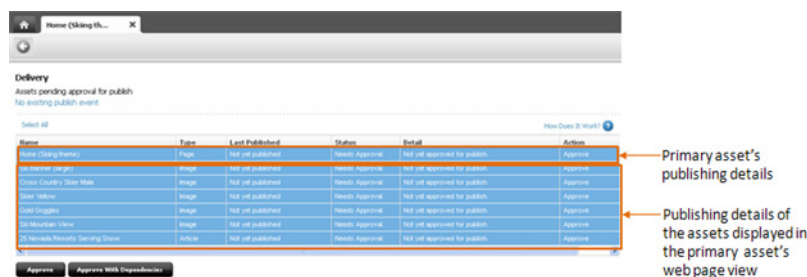
Continue with the steps below to approve the desired assets (and their dependencies). If you do not wish to approve any assets at this time, click **Go Back**.

4. In the table, select the assets you wish to approve.

   - To select all assets, click **Select All**.

   - To select only certain assets, **Ctrl**+click their rows.

5. Approve the selected asset(s). Do one of the following

   - Click **Approve With Dependencies**.

     If the approval is successful, the asset and all of its dependencies are now approved for publishing to the selected destination and the status of the asset(s) changes to "Approved."

   - Click **Approve**.

   One of the following happens:

   - If the asset has no dependencies, the status of the asset changes from "Needs Approval" to "Approved."

   - If the asset has dependencies that are preventing publication, the status of the asset (located in the "Status" column of the table) changes to "Held" and the

"Detail" column displays the number of dependent assets. To approve the dependent assets, continue to step 6.

6. If the asset's dependencies are preventing publishing, do the following:

   a. In the "Detail" column, click the *n* **blocking assets** link to display a list of dependent assets (as shown in Figure 14–3).

Figure 14–3   Dependencies Listed Under the Approval Table

   b. At the top of the list of dependent assets, click **Select All** to select all assets in the list. Then click **Approve**.

   WebCenter Sites approves the dependent assets and calculates their dependencies. If any of the dependent assets have their own dependencies, WebCenter Sites displays a list of the dependent assets' dependencies; again, click **Select All**, and then click **Approve**. Continue this process until all dependencies for all assets are approved.

   When all dependencies are approved, the status of the "Held" assets changes to "Approved." The assets and their dependencies are now approved for publishing to the selected destination.

7. (Optional) If the administrator configured a publishing event for the destination to which you approved the asset(s), you will see the "Publish event schedule for destination" link, as shown in Figure 14–4:

Figure 14–4   'Publish Event Scheduled for Destination' Link

Point to this link to view a summary of the publishing event schedule for the selected destination. For more information about publishing sessions, see the *Oracle WebCenter Site Administrator's Guide*.

14.2.2 Approving a Site Plan for Publishing

WebCenter Sites allows you to approve site plans (SitePlan assets), the Pages placed under a site plan, Device Groups, and Device assets directly from the **Site Tree**. The approval of SitePlan assets is not dependent on any other assets. However, for your site to be ready for publishing, you will have to approve all the Device Groups on your WebCenter Sites system as well as the Page assets that are placed under the site plan and the content assets associated with those Pages. If you are approving a site plan for publishing to a management system, you must also approve all Device assets associated with that site plan.

> **Note:** For more information about site plans, Device Groups, and Device assets, see Chapter 13, "Creating Mobile Websites" and the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

To approve a site plan for publishing

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. In the navigation pane, click the **Site Tree** bar.

    The **Site Tree** is displayed in the navigation pane (as shown in Figure 14–5).

Figure 14–5 Site Tree
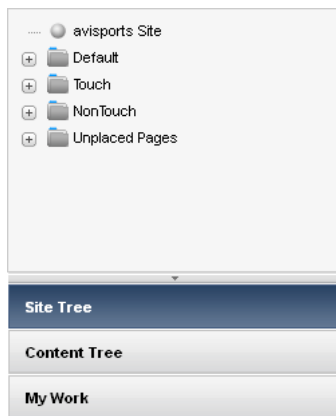
3. In the **Site Tree**, right-click the desired site plan or Page you wish to approve. If you are approving a placed Page, expand the site plan under which the page is placed by clicking the plus-sign next to it.

4. In the context menu, select **Approve** and then select the desired publishing destination.

    A context menu opens, as shown in Figure 14–6.

Figure 14–6   Context Menu for a Site Plan
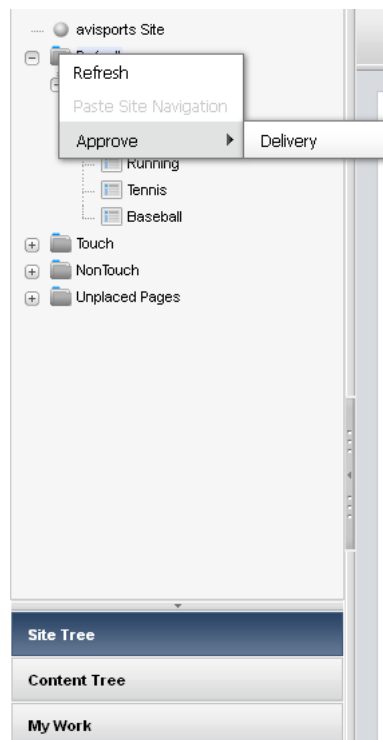
A tab opens displaying a table containing the publishing details of the site plan or placed Page you chose to approve for the selected destination (as shown in):

Note: If you are approving a SitePlan asset, you will see the following assets listed in the approval table:

- Site Plan asset representing the site plan you chose to approve.

- All Device Groups on your WebCenter Sites system.

  Device assets associated with the site plan you want to approve.

- Page assets placed under the site plan you chose to approve.

- Content assets associated with the site plan's placed Pages.

If you are approving a placed Page, you will see only that Page asset listed in the approval table.

Figure 14–7   Approval Table

5. If you wish to narrow down the items displayed in the approval table, use the filter located at the top of the table. You can filter the list by selecting one or more of the following checkboxes:

■ **Show All** – Displays the publishing details of the site plan along with the placed pages, device images, and device groups associated with that site plan.

■ **Placed Pages** – Displays the publishing details of only the pages placed under the site plan you selected to approve.

■ **Devices** – Displays the publishing details of only the Devices associated with the site plan you chose to approve.

> **Note:** You are required to approve Device assets only if you are publishing the site plan to a management system.

■ **Device Groups** – Displays the publishing details of all the Device Groups on your WebCenter Sites system.

> **Note:** Device Groups are dependent on one another. If you approve one Device Group, you must approve them all.

6. Approve the SitePlan asset, Page assets, content assets, Devices, and Device Groups. Do one of the following:

– Select all the items listed in the approval table and then click **Approve With Dependencies**.

If the approval is successful, the SitePlan, content assets, placed Pages, Devices, and Device Groups listed in the approval table are now approved for publishing to the selected destination and the status of the items changes to "Approved" (as shown in Figure 14–8).

Figure 14–8   Approval Table – Approved with Dependencies

– Click **Approve**.

The SitePlan asset, Devices, content assets, placed Pages, Device Groups, and Device assets are approved for publishing (the status of these items changes from "Needs Approval" to "Approved").

If the Page or Device Group assets you want to approve have dependencies that are preventing them from publication, the status of those assets changes to "Held" and the "Detail" column displays the number of dependent assets blocking them from being approved (as shown in Figure 14–9).

Figure 14–9   Approval table – Approved Without Dependencies

To approve dependent assets, see step 7.

7. If the Page and Device Group assets you wish to approve have dependencies that are preventing approval, do the following:

a. In the "Detail" column, click the *n* **blocking assets** link, next to the asset that is held for approval, to display a list of dependent assets (as shown in Figure 14–10).

Figure 14–10   Dependencies Table Displayed Below Approval Table

b. At the top of the list of dependent assets, click **Select All** and then click **Approve**.

WebCenter Sites approves the dependent assets and calculates their own dependencies. If any of the dependent assets have their own dependencies, WebCenter Sites displays a list of the dependent assets' dependencies; again click **Select All**, and then click **Approve**. Continue this process until all dependencies for all assets are approved.

c. Repeat steps a and b for each asset that is held for publishing.

When all dependencies are approved, the status of the "Held" assets changes to "Approved." The assets and their dependencies are now approved for publishing to the selected destination.

14.2.3 Checking an Asset's Approval Status

To check an asset's approval status

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose approval status you wish to view:

   – **To find the asset using the search feature:**

     a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

        For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

     b. In the search results list, navigate to the desired asset and click its name.

        WebCenter Sites opens a tab displaying the asset's Inspect view.

   – **To open an asset that is currently assigned to you:**

     a. Access your dashboard by clicking the **Home** tab.

     b. Navigate to the assignments section of your dashboard.

        The "Assignments" section of the dashboard displays a list of all the assets that have been assigned to you.

     c. In the list of assets, click the name of the asset you wish to approve.

        WebCenter Sites opens a tab displaying the asset's Inspect view.

3. In the menu bar, select **View**, then select **Status**.

   The tab displays the asset's status summary screen, which displays information about the asset's approval status, as shown in Figure 14–11.

Figure 14–11   Publishing Status in an Asset's Status Summary Screen
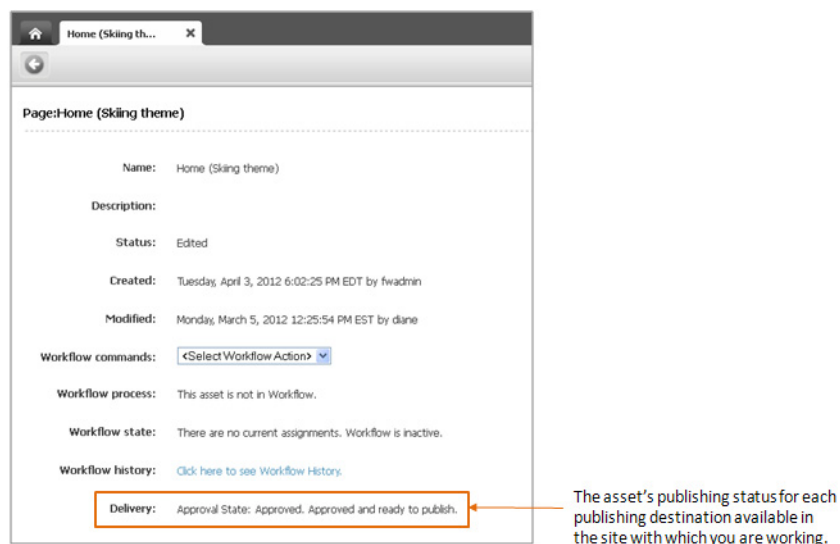
4. Navigate to the name of the desired publishing destination and check the asset's approval state. For information about an asset's approval state, see Section 14.1.2, "Approval States."

14.2.4 Removing Assets from the Publishing Queue

If you decide not to publish an approved asset, you can **unapprove** the asset. When you unapprove, WebCenter Sites removes the asset from the publishing queue (for the given destination) and changes its status to "Needs Approval." If the unapproved asset is a child (referenced asset) of one or more assets in the publishing queue, WebCenter Sites removes the parent (referring) assets from the publishing queue for the destination and changes their approval states to "Held."

To remove an asset from the publishing queue

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to remove from the publishing queue:

   – **To find the asset using the search feature:**

   a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

   For more information on finding assets, see Section 6.1, "Overview of Finding Assets."

   b. In the search results list, navigate to the desired asset and click its name.

   WebCenter Sites opens a tab displaying the asset's Inspect view.

   – **To open an asset that is currently assigned to you:**

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the assignments section of your dashboard.

   The "Assignments" section of the dashboard displays a list of all the assets that have been assigned to you.

   c. In the list of assets, click the name of the asset you wish to approve.

   WebCenter Sites opens a tab displaying the asset's Inspect view.

3. Unapprove the asset:

   a. Do one of the following:

   – In the asset's toolbar, click the **Approve** icon. In the menu that appears below the icon, select the desired publishing destination.

   – In the menu bar, select **Content**, then select **Approve**, and then *select the desired publishing destination*.

   The tab displays a table containing the asset's details for the selected destination.

Figure 14–12   Approval Table – Unapproving an Asset

b. In the "Action" column of the table, click **Unapprove**.

WebCenter Sites removes the asset from the publishing queue. The asset's approval state in the "Status" column of the table changes to "Needs Approval." If the asset is a child (referenced asset) of one or more assets in the publishing queue, WebCenter Sites removes the parent (referring) assets from the queue and changes their approval states to "Held."

15

Revision Tracking

Revision tracking is an optional feature and must be enabled by the WebCenter Sites administrator for the asset types on your sites. Revision tracking allows you to track and control the changes made to your assets.

With revision tracking, you can:

- Enforce that only one person at a time can edit or delete an asset.

- Track and view past versions of an asset and the user(s) who worked with the asset.

- Restore (roll back) an asset to a previous version.

This chapter describes revision tracking and the procedures used to track assets, illustrated with examples from the avisports sample site. In the avisports sample site, revision tracking is not enabled by default.

This chapter contains the following sections:

- Section 15.1, "Overview"

- Section 15.2, "Checking Out Assets"

- Section 15.3, "Examining Your Checkouts"

- Section 15.4, "Undoing a Checkout"

- Section 15.5, "Checking In Assets"

- Section 15.6, "Examining Revision History"

- Section 15.7, "Reverting to a Previous Version (Rollback)"

> **Note:** Contact your administrator if you have any questions or concerns about revision tracking as it applies to you.

15.1 Overview

Revision tracking allows you to check out, or lock, assets. When you check out an asset, you lock the asset, which prevents other users from editing or deleting it. When you are finished working with the asset, you can decide to check the asset back in with the changes you made or discard the changes you made to the asset by undoing the checkout. In either case, the asset is then again available for modification by other users. An asset that is checked out to you, however, can still be viewed and searched for by other users, as well as retrieved by queries or collections.

When revision tracking is enabled, you control whether other users can edit or delete an asset by checking it out and back in. You can either check assets out manually, or

you can let WebCenter Sites handle the check out process automatically. If you allow WebCenter Sites to automatically check assets out to you, you will still have to manually check assets back in when you are done working with them.

15.1.1 Checkout and Checkin

When revision tracking is enabled, the following commands control access to assets:

- **Check out**. Only one user can check out an asset at any given time. If other users try to check the asset out or modify it, WebCenter Sites informs them that the asset is locked by someone else.

  If an asset is assigned to you in a workflow, and you have checked out the asset, then you cannot finish your assignment until you check the asset back in.

  An asset that is checked out (locked by a user) cannot be approved for publishing until it is checked in (unlocked).

- **Undo Checkout**. If you check out an asset and then decide that you do not want to save the changes you have made to it, cancel or "undo" the checkout. In this case, the asset is simply unlocked, changes are reverted back to the most current version of the asset, and no new version is saved.

- **Check in**. You check in assets that you have checked out. After the asset is checked in, others can work with it, and if the asset is assigned to you in a workflow, you can finish your assignment.

  When you check in an asset that you have checked out, a record is made of the checkin, and a copy of the last saved version of the asset is preserved as a new version (the number of versions kept is set by the administrator).

  Another option is to check in the asset so that you have an archived version but to keep it checked out. This option enables you to create a version but keeps the asset checked out to you.

If you edit an asset that is not already checked out to you, WebCenter Sites checks it out to you automatically. When you save the edited asset, WebCenter Sites does not check the asset back in for you. Therefore, you will still have to manually check the new version of the asset back in after you save the changes you have made to it. Similarly, if you do not want to save the changes you made to an asset that is checked out to you, you will have to manually undo the checkout.

If you delete an asset that is not already checked out to you, WebCenter Sites checks it out to you for deletion. This ensures that no other users can work with the asset as you are deleting it from WebCenter Sites. Once the asset is deleted, it is no longer checked out to you because it no longer exists in the system.

15.1.1.1 Releasing Locked Assets

If you edit an asset when revision tracking is enabled, the asset is automatically checked out to you. Because of this, you may accidentally check out an asset while you work in the WebCenter Sites interface. When an asset is checked out to you, the asset is locked and prevents other users from working with it. To make sure that you are not preventing other people from working with assets that you have inadvertently checked out, review the assets checked out to you by viewing the "Checkouts" section of your dashboard (located in the **Home** tab) and check in (or, if you do not want to commit your changes to the database, undo the checkout of) any assets that you do not need to lock.

15.1.1.2 Functions That Automatically Checkout an Asset To You

The following table describes asset management functions that check assets out automatically:

Function	Effect on Revision Control
Create	As soon as you create a new asset, the asset is checked out to you.
Edit	Checks out the asset and prohibits other users from editing or deleting it.
Copy	Creates a new copy of the asset. The source asset cannot be checked out during the copy operation. As soon as you create a copy of an asset, the copy is automatically checked out to you.

15.1.2 Rollback and Revision History

When you check in an asset that you have checked out, WebCenter Sites stores a new version of the asset and adds it to a list of previous versions. You can later restore the asset to one of those previous versions and you can examine the asset's revision history.

> **Note:** The volume of revisions to be saved for a given asset may be limited (depending on your administrator's configurations). Therefore, earlier versions of the asset could be overwritten. In this case, the overwritten version will not be shown in the asset's revision history. An asset cannot be rolled back to a version that has been overwritten.

- **Rollback** means restoring the asset to a previous version. When you have an asset checked out, you can roll it back to any previous version, (provided it was not overwritten and it is not the first, SYSTEM, version). Rollback restores the contents of the asset, but does not reset its status (created, edited, and so on) as of the previous version, nor does it affect workflow status. If the asset is part of a workflow, anyone who has the appropriate permissions can restore it to a previous version.

- **Revision History**. You or any user can list and examine the revision history of an asset. The revision history also shows who, if anyone, currently has the asset checked out. You can also see comments entered by the user who checked the asset in at the time, if the user chose to enter a comment, by looking at the "Comments" section of the revision history table.

Figure 15–1   'Revision History Report' Table

15.2 Checking Out Assets

This section shows you how to manually check out an asset.

To check out an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to check out. Do one of the following:

    –   Search for and open the desired asset:

        a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

        b. In the list of search results, click the name of the desired asset.

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

        a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane.)

        b. In the list of bookmarked assets, double-click the name of the desired asset.

    For more information on finding assets, see Chapter 6, "Finding and Organizing Assets."

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

3. Check out the asset:

    > **Note:**   If the asset is checked out to another user, when you try to edit the asset or check the asset out, you will receive an error message like the one below:
    >
    > ⛔ Unable to edit asset because it is checked out to fwadmin   ✕
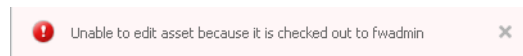
    –   If you are working in Form Mode, in the asset's toolbar, click the **Check Out** icon.

        > **Note:**   If you do not see the **Check Out** icon in the asset's toolbar, either revision tracking for that asset type is not enabled on your site or the asset is already checked out to you.

        WebCenter Sites checks the asset out to you.

    –   If you are working in Web Mode, do the following:

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

            The tab displays the "Asset to be checked in" screen (shown in Figure 15–2). This screen contains a table with revision tracking details about the primary asset (asset you opened in Web Mode) and all of its associated assets (assets displayed in the primary asset's web page view), as shown below:

Figure 15–2   'Assets to be checked in' Screen'

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

b. In the revision tracking detail table, select (**Ctrl**+click) the asset(s) you wish 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 desired asset's row.

WebCenter Sites checks the asset(s) out to you.

15.3 Examining Your Checkouts

A list of assets that are currently checked out to you is accessible from your dashboard (in the **Home** tab).

To view a list of assets currently checked out to you

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Access your dashboard by clicking the **Home** tab.

3. Navigate to the "Checkouts" section of the dashboard.

The "Checkouts" section of the dashboard (shown in Figure 15–3) lists all of the assets that are currently checked out to you.

Figure 15–3 'Checkouts' Section of the Dashboard
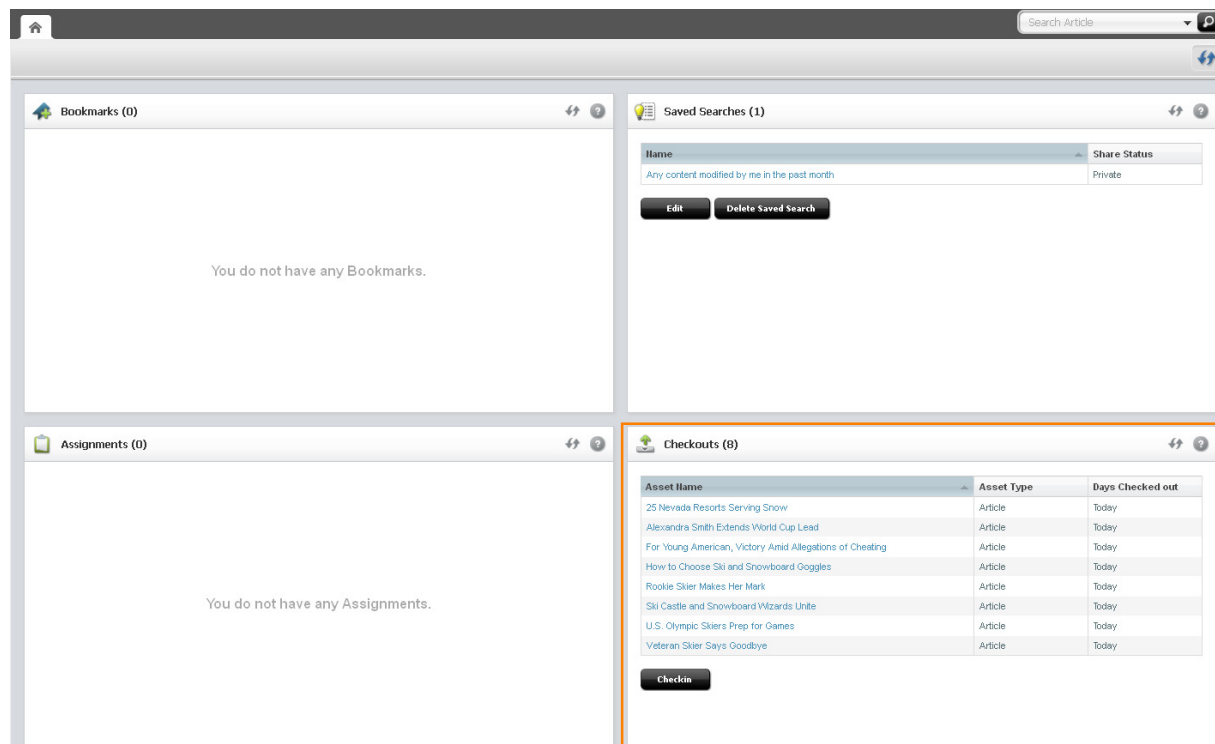
4. (Optional) If you want to open an asset, click its name in the list.

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

15.4 Undoing a Checkout

This section shows you how to undo the checkout of an asset. Undoing a check out makes the asset available to other users who have permissions to work with it.

To undo the checkout of an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the asset for which you want to undo the checkout and open it:

    a. Access the dashboard by clicking the **Home** tab.

    b. Navigate to the "Checkouts" section of the dashboard.

        The "Checkouts" section of the dashboard displays a list of assets currently checked out to you.

    c. In the list of assets, navigate to the desired asset and click its name.

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

3. Undo the check out. Depending on whether the asset opened in Form Mode or Web Mode, do one of the following:

    – **If the asset opened in Form Mode:**

        a. In the asset's toolbar, click the **Undo Checkout** icon.

The following dialog box is displayed:

Figure 15–4   'Undo Checkout' Warning Message
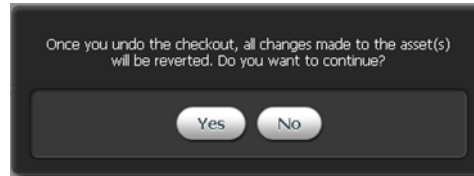
   b.   In the dialog box, click **Yes**.

   WebCenter Sites undoes the checkout of the asset.

– **If the asset opened in Web Mode:**

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

   The tab displays the "Asset to be checked in" screen (shown in Figure 15–5). This screen contains a table with revision tracking details about the primary asset (asset you opened in Web Mode) and all of its associated assets (assets displayed in the primary asset's web page view), as shown below:

Figure 15–5   'Asset to be checked in' Screen for an Asset Displayed in Web Mode

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

   b.   In the revision tracking detail table, select (**Ctrl**+click) the asset(s) whose checkouts you wish to undo and then click the **Undo Checkouts** button.

   WebCenter Sites undoes the check outs of the selected assets.

15.5 Checking In Assets

This section shows you how to check an asset in. 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.

To check in an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the asset you wish to check in and open it:

   a. Access the dashboard by clicking the **Home** tab.

   b. Navigate to the "Checkouts" section of the dashboard.

      The "Checkouts" section of the dashboard displays a list of assets currently checked out to you.

   c. In the list of assets, navigate to the desired asset and click its name.

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

3. Check in the asset. Depending on whether the asset opened in Form Mode or Web Mode, do one of the following:

   – **If the asset opened in Form Mode:**

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

         The tab displays the "Assets to be checked in" screen (shown in Figure 15–6), which displays a table containing the asset's revision tracking details:

Figure 15–6 'Assets to be checked in' Screen for an Asset Displayed in Form Mode

      b. Make sure the row containing the asset is highlighted, then click the **Checkin** button.

      c. (Optional) 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 will apply to all assets that you are checking in.

      d. (Optional) If you want to create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.

      e. Click **Checkin**.

         WebCenter Sites checks the asset in to the database.

   – **If the asset opened in Web Mode:**

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

         The tab displays the "Asset to be checked in" screen. This screen contains a table with revision tracking details about the primary asset (asset you opened in Web Mode) and all of its associated assets (assets displayed in the primary asset's web page view), as shown in Figure 15–7:

Figure 15–7 'Assets to be checked in' Screen for an Asset Displayed in Web Mode

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

b. In the revision tracking detail table, select (**Ctrl**+click) the asset(s) you wish 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 desired asset's row.

c. (Optional) 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 will apply to all assets that you are checking in.

d. (Optional) If you want to create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.

e. Click **Checkin**.

WebCenter Sites checks the selected asset(s) back in to the database.

15.6 Examining Revision History

Note: You can examine an asset's revision history only if the asset is displayed in Form Mode. If the asset opens in Web Mode, you will have to switch to Form Mode

---

To examine an asset's revision history

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose revision history you want to view:

a. Do one of the following:

– If the asset is not currently checked out to you, in the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

> For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

– If the asset is currently checked out to you, access the dashboard by clicking the **Home** tab. Then, navigate to the "Checkouts" section of the dashboard.

b. In the list of assets, navigate to the desired asset and click its name.

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

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

4. View the asset's revision history. Do one of the following:

– In the asset's toolbar, click the **Show versions** icon.

– In the menu bar, select **Edit**, then select **Version**, and then select **Show versions**.

The tab displays the asset's revision history, shown in Figure 15–8:

Figure 15–8 'Revision History Report' Screen

5. Click the **magnifying glass** icon next to the version you want to view.

The tab displays the Inspect view of the version of the asset you selected (in Form Mode).

15.7 Reverting to a Previous Version (Rollback)

This section shows you how to roll an asset back to a previous version.

> **Note:** You can roll an asset back to a previous version only when the asset is displayed in Form Mode. If the asset opens in Web Mode, you will have to switch to Form Mode

To rollback an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find the asset you want to roll back to a previous version and open it:

a. Do one of the following:

– If the asset is not currently checked out to you, in the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

For more information about finding assets, see Chapter 6, "Finding and Organizing Assets."

– If the asset is currently checked out to you, access the dashboard by clicking the **Home** tab. Then, navigate to the "Checkouts" section of the dashboard.

b. In the list of assets, navigate to the desired asset and click its name.

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

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

4. Roll back to a previous version of the asset. Do one of the following:

– In the asset's toolbar, click the **Rollback** icon.

– In the menu bar, select **Edit**, then select **Version**, and then select **Rollback**.

Note: You cannot revert to a previous version of an asset if:

■ Revision tracking is not enabled for the asset type.

■ The asset is already checked out by you or another user. To roll the asset back, it must be checked in.

■ The version to which you want to roll back is the first (SYSTEM) version of the asset.

If you have questions about revision tracking or your permissions, contact your WebCenter Sites administrator.

The tab displays the "Rollback" screen (as shown in Figure 15–9):

Figure 15–9   'Rollback Page: Surfing' Screen
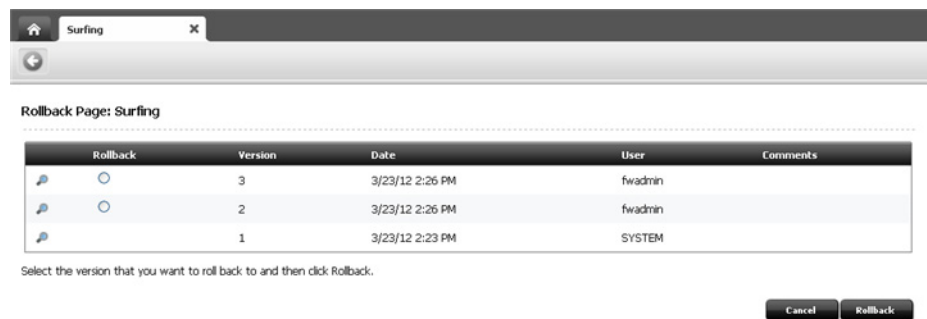
5. In the **Rollback** column of the table, select the radio button next to the version of the asset to which you want to roll back.

6. Click **Rollback**.

WebCenter Sites rolls the asset back to the version you selected. When you roll back an asset, WebCenter Sites creates another version of it.

16

Workflow

Most websites are produced by a team of people in which different individuals assemble content, edit and review it, and decide what goes where and when to update the pages. Work flows from one person to the next in a predictable way, and that process is called **workflow**.

This chapter presents a brief overview of workflow concepts followed by procedures on how to perform specific tasks related to workflow. It includes the following sections:

- Section 16.1, "Overview"
- Section 16.2, "Sample Workflow"
- Section 16.3, "Viewing Your Assignments"
- Section 16.4, "Using Workflow Functions"

16.1 Overview

The following sections describe basic workflow concepts and terminology.

> **Note:** In addition to the functionality described in this chapter, WebCenter Sites provides the following workflow functionality through the WebCenter Sites Admin interface:
>
> - **Workflow groups** – allow you to manage a defined set of assets in a coordinated manner that allows those assets to reach the end of the workflow process together, prior to publishing.
>
> - **Workflow reports** – allow you to track the progression of assets and user assignments in workflow.
>
> For information on workflow groups and reports, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

16.1.1 Workflow and Assets

Assets can (but do not have to) be assigned to a **workflow**. A workflow routes an asset through a series of editorial tasks (states) by assigning the tasks to the appropriate users at the appropriate times. Either specific assets or all assets of a certain type can be assigned to a workflow.

Depending on how your site is configured, assets might be assigned to a workflow either automatically (for example, when you create a new asset) or manually. The

workflow system lets WebCenter Sites direct and track the assignment of assets to users and specifies what users can do with those assets through permissions.

The flow of the editorial tasks performed on the asset, as well as who is authorized to perform those tasks at each point in the workflow is defined by a **workflow process**. The workflow administrator can define as many workflow processes per asset type as needed.

> **Note:** During workflow, the asset is not electronically transferred from one person to the next. What is transferred is permissions to the asset. The asset itself remains in its original location in the database throughout the workflow process and throughout its existence in WebCenter Sites.

16.1.2 States and Steps

A workflow process defines a series of **states**. A state is a point in the workflow process that represents the status of the asset at that point, for example, "Ready to Edit" or "Ready for Approval."

States are linked together in a specific order by **steps**. A step is the movement of the asset between states. Because creating workflow steps links workflow states in a specific order, creating steps in a workflow process is what organizes the process. In each step, the asset goes from a start ("from") state to an end ("to") state. When creating the workflow process, the administrator defines the states and links them via the appropriate steps.

Steps and states have names; for example, in the FirstSite II sample site, "Send for Approval" is a step originating from the "Ready to Edit" state and resulting in the "Ready for Approval" state. An asset can move from one state to another via more than one step. For example, an asset that is ready for approval can be rejected because of factual errors or stylistic problems, each type of rejection having its own step.

Assets are assigned to users by roles. As an asset progresses through the workflow, each step assigns it to users holding roles authorized to work on the asset in the next state. For each step, there is at least one role authorized to complete work on an asset and allow it to continue moving through the workflow. In certain cases, a user holding the appropriate role can choose between steps; for example, a user holding the Approver role can either approve or reject an asset assigned to him/her for approval.

When you log in to WebCenter Sites, the "Assignments" section of the dashboard (**Home** tab) provides a summary of your present workload, from which you can access the assets assigned to you. When your work on the asset is complete, you use the **Finish Assignment** function to invoke the next step in the workflow; the workflow process then moves the asset to the next state and assigns the asset to the appropriate users. Note that a step can be conditional; that is, certain users or all users can be prevented from taking a step until some condition is met.

16.1.3 Users, Roles, and Participants

A **user** in WebCenter Sites is a person who is assigned a WebCenter Sites user name which he/she uses to identify him/herself and to log in to WebCenter Sites. What a user can or cannot do is determined by the role (or roles) assigned to that user by the administrator.

A **role** describes and determines the function(s) of a user in a CM site by granting him/her permissions to perform specific functions; in the context of workflow, these permissions are called **function privileges**.

The workflow process grants roles (not individual users) the appropriate function privileges. The function privileges are enforced only when an asset has been assigned to a workflow. Function privileges depend not only on the user's role, but also on the state of the asset and whether or not the asset has been assigned to the user.

> **Note:** Because function privileges are granted to a user through his/her role(s), they function independently of the access permissions assigned by the administrator at the user level.
>
> For example, a user might not normally have the permission to edit "Content" assets, but he/she can have the function privilege to do so if he/she has the Editor role, is participating in a workflow process for "Content" assets, and the asset he/she wants to edit is in the appropriate workflow state.

Each role required by a particular workflow state in a workflow process is a participating role. Participating roles are chosen for each state in a workflow process by the administrator. Each user whose assigned role(s) match those required by that workflow state is therefore a **participant** for that state in the workflow process and is authorized to take the workflow step leading from that state to the next state.

Unless the administrator decides otherwise, assets placed in workflow are assigned to all available participants for a given role. However, depending on how your administrator configured a given workflow step, you may be able to limit which users can work with a particular asset by choosing the desired assignees from among the participants available in each participating role.

An **assignee** is a workflow participant chosen to work on a specific assignment. Assignees are set when an asset is assigned to a workflow, but you may have the ability to choose different assignees when the asset is already in a workflow process. How assignees are chosen for a workflow process is determined by the configurations your administrator made to the steps in the workflow process. Workflow steps can be configured to allow users assigned specific roles to choose assignees. However, workflow steps can also be configured to automatically assign an asset to all users with a specified role or to assign an asset to only the user who created it.

When assignees are set for a given asset in the workflow, only the chosen assignees will see the asset in their assignment lists, and only they can complete the assignment before the workflow process changes the state of the asset.

16.1.4 Workflow Assignments

An assignment is an asset that a chosen participant (an assignee) is (or is supposed to be) working on. An asset appears on the participant's assignment list as soon as the asset enters a state for which the participant has a role to fulfill.

A typical workflow design generates an e-mail notification when you are given a workflow assignment. You can see an updated list of your assignments at any time in the "Assignments" section of your dashboard (located on the **Home** tab).

16.1.4.1 Assignment Duration

Each workflow state has an associated estimated time of completion (deadline) for an assignment. If the administrator has granted you the appropriate permission, you can override the default estimate for the next assignment.

As the assignment deadline nears, associated assignment actions in the form of e-mail notifications can be triggered as timed events relative to the estimated time to completion. For example:

- You receive a reminder the day before your assignment is due.

- You and the workflow initiator receive a warning the day the assignment is due.

- The initiator receives notification the day after the due date that the assignment has not been completed.

16.1.4.2 Voting Your Assignments

If you participate in workflow, you have a vote. **Voting** means taking a workflow step that moves the asset from its current state to the next, after you have completed the task required by the current workflow state (such as editing an article) and committed the changes to the WebCenter Sites database (saved the asset), if applicable. You cast your vote by either using the **Finish Assignment** function (available in the "Assignments" section of the dashboard) or by viewing the status of an asset and finishing your assignment using the **Workflow commands** drop-down menu (accessible by selecting **View** and then selecting **Status** in the menu bar when working with the asset). If more than one participant with a given role has the assignment, either one, or all of them must vote before the asset moves to the next state, depending on how the workflow was set up by the administrator.

Depending on your role in the workflow process, when you vote to finish the assignment you may be given a choice of steps to take; for example, if you are an approver and your current assignment is to either approve an asset for publishing or reject it, when you finish your assignment you can invoke either a step that approves the asset for publishing, or a step that rejects it due to factual error, depending on your choice. When you vote, the asset moves to the next workflow state unless the step you chose is in disagreement with the step chosen by other assignees with the same role as you.

If, for some reason, you are unable to complete your assignment, you can **abstain from voting**, as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow. If you change your mind, you can reverse your abstention by voting again, as long as the asset has not already moved to the next state.

16.1.4.3 Delegating Your Assignments

Another way of handling an assignment is to **delegate** it to another participant holding the same role as you, assuming the asset you are delegating is not already assigned to that person for the current workflow state.

Your function privileges (set by the administrator) determine whether you can delegate your assignments. Also, the administrator can delegate assignments on your and other assignees' behalf, if necessary.

Delegating an assignment can trigger associated **delegate actions** in the form of e-mail notifications. For example:

- The recipient of the new assignment is notified.

- The workflow administrator is notified of the assignment delegation.

16.1.5 Deadlocks

An asset moves from one state to the next when assignees cast their votes (that is, take a step) for a given workflow state. When defining the workflow process, the administrator decides whether each step is **all-voting**, that is, whether all assignees must vote (take the step) for the asset to move to the next state. By default, steps are not all-voting, which means that the first assignee to vote in a given workflow state determines the flow of the asset, and the assignments for the remaining assignees for that workflow state are cancelled. If the administrator set the step to be all-voting, the asset is held in its current workflow state until all assignees have voted, at which time the asset moves to the next state.

If there is a choice of steps and each step is all-voting, the potential for a deadlock exists. A deadlock occurs when all of the assignees must vote, and the voting is not unanimous on which step to take. A workflow process typically includes a **deadlock action** to generate e-mail notifications to all assignees, showing the vote tally and advising all assignees to vote again in favor of the majority. Deadlocks cause additional work for all the users involved, and should be avoided whenever possible. They should also be resolved as quickly as possible so that the flow of work is not hindered.

16.2 Sample Workflow

The FirstSite II sample site includes six sample workflow processes which guide assets of different types from creation to approval for publishing. The sample workflows are simple, transitioning through three states via five possible steps, but they serve to illustrate how a workflow process works. This section is based on the FSII: Approval for Content sample workflow process included in the FirstSite II sample site.

The FSII: Approval for Content sample workflow process has the following roles participating: author, editor, approver, and administrator. Each role has only a single participant (your organization will most likely have more complex processes, with several users participating in each role). A participant from any of the roles can create a new "Content" asset, which automatically assigns it to the FSII: Approval for Content workflow. By creating the asset, workflow is initiated. The asset then moves from author to editor to approver. The approver can either approve or reject the asset. If the approver rejects the asset, it goes back to the editor. The administrator can perform the functions of author, editor, and approver at any point in the workflow, as well as return an already approved asset back to the editor for additional changes.

16.2.1 Sample Workflow States and Steps

The FirstSite II sample site includes a sample workflow process called FSII: Approval for Content. The flow of the process is shown in Figure 16–1:

Figure 16–1   Workflow-Flowchart
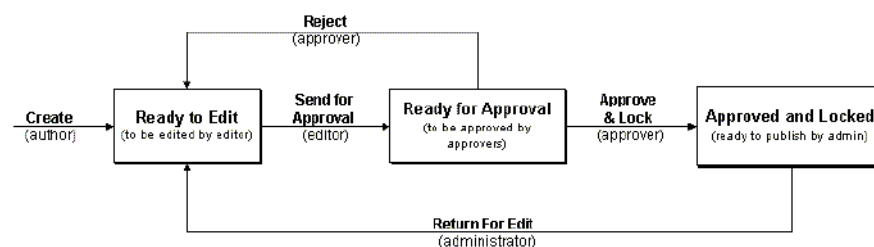
The steps and states from this workflow process are described in Table 16–1:

Table 16–1 States and Steps

Asset in State...	Step	Description	Asset Moves to State...
none	Create	A user with the ContentAuthor role creates a "Content" asset, which automatically assigns it to the FSII: Approval for Content workflow.	Ready to Edit
Ready to Edit	Send for Approval	A user with the ContentEditor role receives an e-mail notification of the assignment. The editor revises the asset to complete the assignment.	Ready for Approval
Ready for Approval	Reject	A user with the Approver role receives an e-mail notification of the assignment. The approver completes the assignment by rejecting the asset because of factual errors. The rejection triggers a notice to the editor, who must make some corrections and resubmit the asset for approval.	Ready to Edit
Ready for Approval	Approve and Lock	The approver completes the assignments by approving the asset. The asset is flagged in the WebCenter Sites database as "ready to publish" for selected destinations.	Approved and Locked
Approved and Locked	Return for Edit	The workflow administrator (holding the Workflow Admin role) reviews the asset and determines that the content needs to be updated with additional information. The workflow administrator then uses votes to return the asset to the editor for revision.	Ready to Edit

16.2.2 Sample Workflow Scenario

This section describes the typical flow of a "Content" asset through the FSII: Approval for Content workflow process.

1. The author creates the asset and writes the content

The process starts when Conrad the author creates the "Content" asset. Since the "Content" asset type in the FirstSite II sample site is configured to automatically place each new "Content" asset in workflow, Conrad's asset is automatically placed into the FSII: Approval for Content workflow process. Conrad writes the content and saves the "Content" asset.

When Conrad saves the asset, the workflow process automatically changes the state of the asset to "Ready to Edit," assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

2. The editor edits the asset and sends it for approval

Connie the editor logs in, checks her assignment list, and opens the "Content" asset for editing. She reads the content and fixes some punctuation. When done, Connie saves her changes and then votes to send the asset on for approval.

The workflow process changes the state of the asset to "Ready for Approval," assigns it to Napoleon the approver, and sends Napoleon an e-mail notice about his new assignment.

3. The approver approves the asset

Napoleon the approver is already logged in, so when he receives his e-mail, he accesses the "Assignments" section of the dashboard to view his assignment list. Napoleon opens the newly assigned "Content" asset and examines it. It looks fine, so he can vote to either approve or reject the asset for this workflow process. The workflow process presents both options to him.

> **Note:** If two or more users with the same role have the same assignment in a given workflow state, the first vote cast determines the next state for the asset.
>
> For example, if the FSII: Approval for Content workflow process included two approver users who both had a vote when approving the asset for publishing, a rejection by either of them would cancel the assignment of the other person and return the asset to the editor.
>
> Your administrator might set up a workflow in which a disagreement like this causes a deadlock (see Section 16.1.5, "Deadlocks") that has to be resolved before the asset is returned to the previous state or moved to the next one.

Since Napolean voted to approve the asset, the workflow process changes the state of the asset to "Approved and Locked," and flags it in the database as "ready to publish." The asset will be published to the website during the next publishing session.

4. The workflow administrator returns to the editor

When new information becomes available, it has to be added to the asset. When that happens, the workflow administrator can vote in the workflow process to return the asset to Connie for review and updating.

The workflow process automatically changes the state of the asset to "Ready to Edit," assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

When Connie finishes her assignment, the updated asset will need to be re-approved before it can be re-published to the website.

16.3 Viewing Your Assignments

To manage your workload, you can view a list of your current assignments and their status by accessing the "Assignments" section of your dashboard (located on the **Home** tab).

> **Note:** As you work in the interface, new assignments might be given to you, and you may complete some of your current assignments, causing your assignment list to change. Check your assignment list periodically to make sure you stay up to date with your assignments.

To view a list of your workflow assignments

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Access your dashboard by clicking the **Home** tab. Then navigate to the "Assignments" section of your dashboard.

   The "Assignments" section of your dashboard displays a list of your workflow assignments.

Figure 16–2   'Assignments' Widget

The list provides information about the asset's name, the action to take in the workflow process, the name of the user who assigned the asset to you, and the amount of days left until the assignment is due for completion.

3. Click an asset's name to open it in its Inspect view (in either Form Mode or Web Mode). You can also right-click an asset in the list to open the asset's Edit view or to preview the asset.

16.4 Using Workflow Functions

The following sections describe the workflow functions you use in the Contributor interface. These functions are available from the menu bar (select **View**, and then select **Status**) when you are working with an asset. Depending on your function privileges, some of the described functions may not be available to you.

This section provides information about the following topics:

- Section 16.4.1, "Assigning an Asset to a Workflow"
- Section 16.4.2, "Setting a Process Deadline"
- Section 16.4.3, "Setting an Assignment Deadline"
- Section 16.4.4, "Finishing Your Assignments"
- Section 16.4.5, "Delegating Your Assignments"
- Section 16.4.6, "Abstaining from Voting"
- Section 16.4.7, "Resolving Deadlocks"
- Section 16.4.8, "Removing an Asset from Workflow"
- Section 16.4.9, "Viewing an Asset's Participant (Assignee) List"
- Section 16.4.10, "Setting Workflow Participants"
- Section 16.4.11, "Examining the Workflow Progress of an Asset"

16.4.1 Assigning an Asset to a Workflow

An asset can be assigned to a workflow either automatically or manually.

Automatic workflow assignment is set up by the administrator for selected asset types. When you create a new asset of such type, the asset is automatically placed in the workflow process assigned to that asset type. Consult your administrator to find out which asset types are set up for automatic workflow assignment.

Manual workflow assignment is available to users with appropriate permissions, assuming a workflow process is assigned to the selected asset type.

To manually assign an asset to a workflow

> **Note:** Before an asset can be assigned to a workflow, the administrator must first assign one or more workflow processes to the asset type of the asset in question; otherwise, the option to assign the asset to a workflow is not available. Consult your administrator to find out which workflow processes are available to which asset types on your system.

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you want to place in workflow. Do one of the following:

   – Search for and open the desired asset:

     a. In the **Search** field, enter search criteria identifying the asset and click the **magnifying glass** button.

        A "Search" tab opens displaying the results of your search.

     b. In the list of search results, click the name of the desired asset.

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

     a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar.)

        A list of bookmarked assets is displayed underneath the **Bookmarks** node.

     b. In the list of bookmarked assets, double-click the name of the desired asset.

     For more information on searching, see Chapter 6, "Finding and Organizing Assets."

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

3. In the menu bar, select **View**, then select **Status**.

4. In the "Workflow commands" drop-down menu, choose **Select Workflow**.

   The tab displays the "Select Workflow" form, shown in Figure 16–3:

Figure 16–3   'Select Workflow' Form

5. In the "Workflow Process" drop-down menu, select a workflow process.

6. If the workflow process is configured in such a way that you must select assignees for each role involved in the workflow process, you will see the **Set Participants...** button. Do the following:

    a. Click **Set Participants...**

        The tab displays the "Set Participants" form.

    b. Select at least one user for each role and then click **Set Participants**.

        Each participant you select becomes an assignee in the respective role(s) for this asset.

7. (Optional) In the "Action to Take" field, enter brief instructions for the person receiving the assignment.

8. Click **Select Workflow**.

9. If the administrator enabled the selection of assignees for the first step in the workflow process, the tab displays the "Choose Assignees" form (shown in Figure 16–4):

Figure 16–4   'Choose Assignees' Form

In such cases, select at least one user for each role, then click **Set Assignees**.

The tab re-displays the asset's status summary screen (as shown in Figure 16–5).

Figure 16–5   Status Summary Screen

At this point, the asset is in workflow; participants with roles required by the next state typically receive e-mail notifications of their assignments.

16.4.2 Setting a Process Deadline

A process deadline is the overall time allotted for an asset to pass through a workflow process. By default, no process deadline is set. This deadline is independent of the assignment deadline described later in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

> **Note:** Deadlines are informational only – the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set a process deadline, the workflow administrator must first have done the following:

- Allowed a process deadline to be set for this workflow process.
- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set a process deadline is available only if both of the above conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether setting a process deadline is enabled for the workflow process in question.

To set a process deadline

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset for which you want to set a process deadline:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the asset for which you want to set a process deadline.

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

3. In the menu bar, select **View**, then select **Status**.

   The tab displays the asset's status summary screen.

4. In the "Workflow commands" drop-down menu, select **Set Process Deadline**.

   > **Note:** If you do not see the **Set Process Deadline** function in the drop-down menu, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

   The tab displays the "Set Process Deadline" form (as shown in Figure 16–6):

Figure 16–6   'Set Process Deadline' Form

5. In the "Set Process Deadline" field, select the **Due** radio button and then use the date picker to select a date.

   When setting a process deadline, you should consider where the asset is in the workflow process, and the cumulative time of the remaining steps. The default is to have no process deadline.

6. Click **Save**.

   The tab re-displays the asset's status summary screen.

16.4.3 Setting an Assignment Deadline

An assignment deadline is the time allotted to the assignee to complete an assignment as an asset advances through workflow. This deadline is independent of the process deadline described earlier in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

> **Note:**   Deadlines are informational only — the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set an assignment deadline, the workflow administrator must first have done the following:

- Allowed an assignment deadline to be set for this workflow state.

- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set the assignment deadline is available only if both of these conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether an assignment deadline is allowed for the workflow state in question.

To set an assignment deadline

> **Note:** This procedure describes how to set an assignment deadline from an asset's Inspect view. You can also set an assignment deadline when you complete an assignment for an asset. In such case, the "Finish My Assignment" form will include an **Assignment Deadline** field.

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset for which you want to set an assignment deadline:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the asset for which you want to set an assignment deadline.

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

3. In the menu bar, select **View**, then select **Status**.

4. In the "Workflow commands" drop-down menu, select **Set Assignment Deadline**.

   > **Note:** If you do not see the **Set Assignment Deadline** function in the drop-down menu, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

   The tab displays the "Set Assignment Deadline" form (shown in Figure 16–7):

   Figure 16–7   'Set Assignment Deadline' Form

5. In the "Set Assignment Deadline" field, enter a date using the date picker. The default assignment deadline is set by the administrator in the workflow state

definition. For example, in the FSII: Approval for Content sample workflow, each state has a duration of one year from the current date and time.

6. Click **Save**.

The tab re-displays the asset's status summary screen.

16.4.4 Finishing Your Assignments

After you complete your work for an assignment, you need to notify the system that you are finished so the asset can continue to move through the workflow.

To finish your assignment for an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Access the desired asset's "Finish My Assignment" form. Do one of the following:

   – If you are currently working with the asset:

      a. In the menu bar, select **View**, then select **Status**.

         The tab displays the asset's status summary screen.

      b. In the "Workflow commands" drop-down menu, select **Finish My Assignment**.

   – If the asset is not already open:

      a. Access your dashboard by clicking the **Home** tab.

      b. Navigate to the "Assignments" section of your dashboard.

      c. In the list of assets assigned to you, select the desired asset's row and then click **Finish Assignment**.

         The "Finish My Assignment" form is displayed (shown in Figure 16–8).

Figure 16–8   'Finish My Assignment' Form

3. Complete the form as follows:

> **Note:**   You can cancel this procedure at any time by clicking either
> **Cancel** (next to the **Finish My Assignment** button) or **Go Back** (in the
> asset's toolbar).

- – If you hold multiple participant roles in the workflow process, in the
  "Assigned User Roles" field, select the role for which you are finishing this
  assignment.

- – (Optional) In the "Action Taken" field, enter a short description of the work
  you completed on the asset.

- – (Optional) In the "Action to Take" field, enter a short suggestion for the next
  person who will work with the asset.

- – If setting the assignment deadline is enabled for the next step in the workflow
  process, you will see the "Assignment Deadline" field.

  If you want to override the time allotted for the next assignment, in the
  "Assignment Deadline" field, select the **Due** radio button and then use the
  date picker to enter a date. If you do not specify a date, the assignment is due
  within the time determined by the next workflow state.

> **Note:** This feature appears only if enabled by the workflow administrator.
>
> To set the assignment deadline, you must hold an administrative role in the workflow process or otherwise have the right privileges. For more information, see Section 16.4.3, "Setting an Assignment Deadline."

4. Click **Finish My Assignment**.

5. If the administrator has set up the workflow process in a way that requires you to choose assignees for the next step when you finish your assignment, WebCenter Sites displays the "Choose Assignees" form (Figure 16–9):

Figure 16–9   'Choose Assignees' Form

Select at least one user for each displayed role, then click **Set Assignees**.

The tab displays the asset's status summary screen (Figure 16–10), showing the changes in the "Workflow State" and "Workflow history" fields. For more information about these fields, see Section 16.4.11, "Examining the Workflow Progress of an Asset."

Figure 16–10   Status Summary Screen
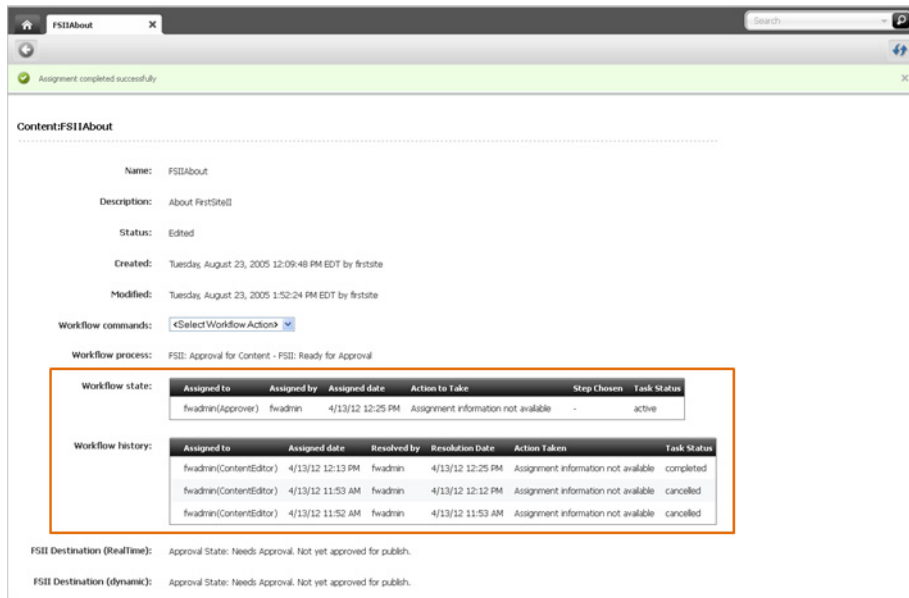
What happens after you complete your assignment depends on the way the administrator set up the next workflow step. There are five possible options:

- **Assign From a List of Participants** – when you (or another user with the appropriate privileges) assign an asset to a workflow, you have the option to decide which participants in each role get the assignment when the asset enters a workflow state requiring those roles. This is the default mechanism for moving an asset through a workflow.

- **Choose Assignees When Step is Taken** – this option, described in step 5 is similar to the "Assign From a List of Participants" option described earlier, but instead of predetermining at the beginning of the workflow who will get the assignment during which workflow state(s), you choose assignees for the next workflow state in real-time each time you take a step.

- **Retain "From" State Assignees** – you keep the assignment as the asset moves to the next state; this allows you to continue working on the asset in that state. You probably know why it is appropriate for you to keep the assignment, but if you do not, ask your WebCenter Sites or workflow administrator.

- **Assign To Everyone –** the asset is assigned to all users holding roles participating in the current workflow process.

- **No Assignments –** as the asset moves to the next state, it remains in the workflow so that function privileges defined for the workflow process are enforced. However, the asset is assigned to no one and participant roles alone (through their assigned function privileges) determine who can work on the asset, and how.

16.4.5 Delegating Your Assignments

As you review your assignment list, you might find that you will be unable to complete certain assignments. For example, you might notice that an assignment's due date falls during your scheduled vacation time. In such situations, you can delegate your assignment to another user who has the same role as you, assuming that the user does not already have an identical assignment for the asset; that is, if both you and another user have the Editor role, you cannot delegate the asset to the other user if

he/she already has the asset assigned through the Editor role. (The asset can still be assigned to the user through a different role or another workflow process.)

To delegate an assignment

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you wish to delegate to another user:

    a. Access your dashboard by clicking the **Home** tab.

    b. Navigate to the "Assignments" section of the dashboard.

    c. In the list of assets, click the name of the desired asset.

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

3. In the menu bar, select **View**, then select **Status**.

4. In the "Workflow commands" drop-down menu, select **Delegate Assignment**.

    > **Note:** If you do not see the **Delegate Assignment** function in the drop-down menu, stop here. You do not have the right permissions to access the function or there are no other users in your role to whom you can delegate your assignment.

    The tab displays the "Delegate Assignment" form, shown in Figure 16–11.

Figure 16–11 'Delegate Assignment' Form

5. If you hold a workflow administrator role and multiple users with the same role are assigned to this step in the workflow process, the "Assigned to" field displays a drop-down menu. In the "Assigned to" drop down list, if you are delegating the

assignment on behalf of another user, select the user who wishes to delegate the assignment. Otherwise, select your own user name.

6. In the "Delegate to" field, select the user to whom you want to delegate the assignment.

7. (Optional) In the "Action Taken" field, enter a comment about your action.

8. Click **Delegate**.

   The tab displays the asset's status summary screen. If the "Workflow History" table is not displayed in the field, click the **Click here to see Workflow History** link. The delegation is denoted in the "Task Status" column for the assignment you delegated.

   This action also triggers a notification e-mail to the new assignee, assuming your site is configured to do so.

16.4.6 Abstaining from Voting

Sometimes, you are unable to deal with a particular assignment: your workload is too heavy, or perhaps you have been miscast in your role. In such situations, you can abstain from voting (that is, waive your participation), as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow.

To abstain from voting on an assignment

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset for which you want to abstain from voting:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the asset for which you wish to abstain from voting.

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

3. In the menu bar, select **View**, then select **Status**.

   The tab displays the asset's status summary screen.

4. In the "Workflow commands" drop-down menu, select **Abstain From Voting**.

   The tab displays the "Abstain from voting" form (Figure 16–12):

Figure 16–12   'Abstain from voting' Form

5. If you hold multiple participant roles in the workflow process, select the role for which you are abstaining from voting on this assignment in the "Assigned User Role" field.

6. (Optional) In the "Action Taken" field, enter a brief explanation for your abstention and click **Abstain from Voting**.

    The tab displays the asset's status summary screen (Figure 16–13). The abstention is denoted in the "Workflow state" field. Keep in mind that abstaining does not cancel your assignment.

Figure 16–13   Status Summary Screen

16.4.7 Resolving Deadlocks

A deadlock can occur when there is a choice of steps to move the asset to the next state, and each step requires all assignees to vote. If the vote is not unanimous in favor of a single step, there is a deadlock.

Frequently, resolving deadlocks involves offline communication and negotiation among assignees to achieve consensus; as such, deadlocks cause additional work for everyone involved and should be avoided whenever possible. If a deadlock occurs, it should be resolved as quickly as possible so that the flow of work suffers minimal delay.

To resolve a deadlock, certain participants must change their votes to achieve unanimity. If you receive an e-mail notification that your vote is the one causing the deadlock, you must vote again to break the deadlock.

To resolve a deadlock, do one of the following:

- Vote again on the assignment and select to finish it, as described in Section 16.4.4, "Finishing Your Assignments".

- In some cases, you can also resolve the deadlock by changing your vote to an abstention, which clears the way for the asset to move to the next workflow state (see Section 16.4.6, "Abstaining from Voting").

16.4.8 Removing an Asset from Workflow

You can remove an asset from workflow assuming you have the permissions to do so. When you remove an asset from workflow, all assignments for the asset are cancelled.

To remove an asset from workflow

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset you wish to remove from workflow:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the desired asset.

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

3. In the menu bar, select **View**, then select **Status**.

   The tab displays the asset's status summary screen.

4. In the "Workflow commands" drop-down menu, select **Remove from Workflow**.

   The tab displays the "Remove from Workflow" form (shown in Figure 16–14):

Figure 16–14   'Remove from Workflow' Form

5. If you are sure you want to remove the asset from workflow, click **Remove From Workflow**. (Otherwise, click **Cancel**.)

The tab re-displays the asset's summary screen. The "Workflow process" field denotes the removal. All assignments for the asset are automatically cancelled.

16.4.9 Viewing an Asset's Participant (Assignee) List
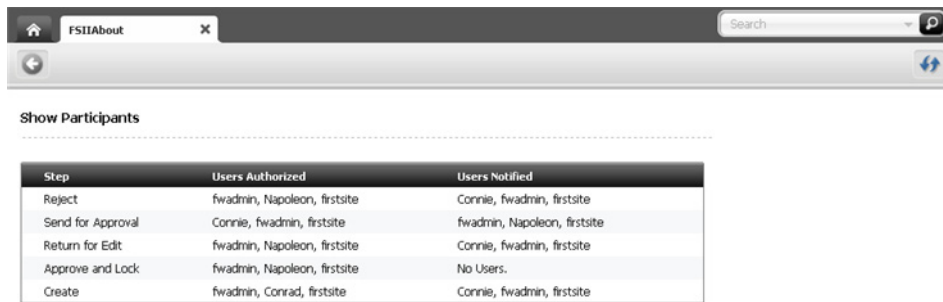
To examine an asset's participant (assignee) list

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose participant list you wish to view:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the desired asset.

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

3. In the menu bar, select **View**, then select **Status**.

4. In the "Workflow commands" drop-down menu, select **Show Participants**.

   > **Note:**   If you do not see the **Show Participants** function in the drop-down menu, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

The tab displays the "Show Participants" summary screen (shown in Figure 16–15):

Figure 16–15   'Show Participants' Screen

For each step in the workflow process, the "Show Participants" summary displays the following:

- **Step** – steps involved in the current workflow process for the asset.

- **Users Authorized** – users authorized to take the next step in the workflow process when they hold the assignment for the asset.

- **Users Notified** – users who will get the next assignment for the asset.

5. When you are finished viewing the list, click the **Go Back** icon in the asset's toolbar to return to the asset's Inspect view.

16.4.10 Setting Workflow Participants

Once you have placed an asset in a workflow and chosen the assignees for each role in the workflow process, you might find that you forgot to include a certain user as an assignee for a particular role. Or perhaps you realized that you gave the assignment to a certain user by mistake. In such cases, you can modify the list of participants for an asset while the asset is in workflow.

To set workflow participants

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset for which you want to set participants:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the desired asset.

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

3. In the menu bar, select **View**, then select **Status**.

   The tab displays the asset's status summary screen.

4. In the "Workflow commands" drop-down menu, select **Set Participants**.

   Note: If you do not see the **Set Participants** function in the drop-down menu, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

   The tab displays the "Set Participants" form (shown in Figure 16–16):

Figure 16–16 'Set Participants' Form

Each participant you select in this form becomes an assignee in the respective role(s) for this asset.

5. Choose the desired assignees for this assignment by selecting the names of the users in each of the role lists.

6. When you have selected the desired assignees, click **Set Participants**.

   The tab displays the asset's status summary screen. The newly selected assignees are denoted in the "Workflow state" field.

   > **Note:** The participants list updates as the asset passes through each step in the workflow process. However, added users get the assignment only if the workflow state assigned to their role has not yet been reached.

16.4.11 Examining the Workflow Progress of an Asset

To examine the workflow progress of an asset

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the asset whose workflow progress you want to view:

   a. Access your dashboard by clicking the **Home** tab.

   b. Navigate to the "Assignments" section of the dashboard.

   c. In the list of assets, click the name of the desired asset.

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary screen.

4. Navigate to the fields containing the asset's workflow summary (shown in Figure 16–17):

Figure 16–17   Workflow Summary Fields
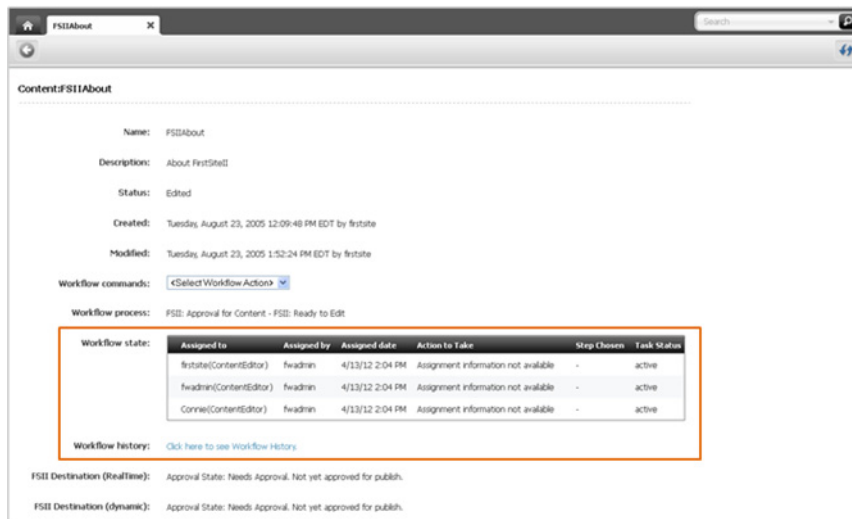
- The **Workflow process** field indicates the workflow process which the asset is currently passing through.

- The **Workflow state** field (Figure 16–18) displays a table that indicates where the asset currently is in the workflow process and to whom the asset is currently assigned.

Figure 16–18   'Workflow state' Field

- The **Workflow history** field (Figure 16–19) displays a table that shows the assignments completed on the asset so far, and the result of each assignment. Each row in the list represents a single assignment. Items are ordered with the most recently completed assignment at the top of the list.

Figure 16–19   'Workflow history' Field

If you do not see the "Workflow history" table, click the **Click here to see Workflow History** link to display the table.

Table 16–2 defines all of the columns in the "Status" and "Workflow history" lists.

Table 16–2   Columns in the 'Status' and 'Workflow history' Lists

Column	Definition
Assigned To	The user name(s) of the assignee(s) for each assignment. Note that the user's role appears in parentheses following the user name.
Assigned By	The user name of the assignee who finished working with the asset and assigned it to the next participant. In the "Workflow history" list, the very first entry in this column (at the bottom of the list) shows the user name of the person who assigned the asset to the workflow process.
Assigned Date	The date and time the asset was assigned to the user.
Action to Take	Instructions from the user who assigned the asset, assuming that person entered instructions in the "Finish Assignment" form when they finished their assignment (see Section 16.4.4, "Finishing Your Assignments"). If the text is longer than the width of the column, click the text to view its entirety.
Step Chosen	The step indicated by the user who completed the assignment, when there is a choice of next step in the "Finish Assignment" form.
Action Taken	Information about the work this user did with the asset (if information was entered on the form). If the text is longer than the width of the column, click the text to view its entirety.
Resolved By	The person whose action moved the asset to the next state.
Resolution Date	The date and time the action was taken to move the asset to the next state.

Table 16–2   (Cont.) Columns in the 'Status' and 'Workflow history' Lists

Column	Definition
Task Status	The status of the assignment. Possible values are as follows: ■ Abstain - the assignee has abstained from voting. ■ Active - the asset is currently assigned to someone. ■ Cancelled - the first vote moved the asset to the next state, so the assignment has been cancelled for the other assignees, or the asset has been removed from workflow. ■ Completed - the assignee has completed the step. ■ Delegated - the assignment has been delegated to another user in the same role. ■ Queued - the asset has multiple assignees for the current state, the next step is all-voting, and not everyone has voted yet. (Also appears if the asset is deadlocked.)

17

Oracle WebCenter Sites: Engage Overview

WebCenter Sites: Engage enables you to design websites that gather information about your site visitors and customers, evaluate that information, and then use that information to personalize the product placements and promotional offerings that are displayed for each visitor. Engage is installed with WebCenter Sites. Engage adds features to WebCenter Sites that extend the XML and JSP object methods available for programming your e-commerce site.

This chapter contains the following sections:

- Section 17.1, "Collecting and Using Visitor Data"
- Section 17.2, "Using Segments to Categorize Visitors"
- Section 17.3, "Making Recommendations to Segmented Visitors"
- Section 17.4, "Basing Promotions on Buying Patterns"

17.1 Collecting and Using Visitor Data

With Engage, you use assets to do the following:

- Collect visitor data using the Visitor Attribute, History Attribute, and History Definition assets
- Use that visitor data to define visitor segments (using Segment assets)
- Recommend products and content to visitors based on the segments they belong to (using Recommendation assets)
- Run promotions that apply to all or specific segments (Promotion assets)

Developers and administrators create and manage the visitor data and underlying business logic, while marketers create and manage the Segment, Recommendation, and Promotion assets. As with any of the other Sites applications, you create and work with assets on the management site. Then, when assets are approved, you publish them to your delivery site.

Marketers and developers are expected to collaborate extensively to implement effective marketing efforts.

17.2 Using Segments to Categorize Visitors

Segments are assets that categorize groups of visitors based on the visitor data that you are gathering about them. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting the values that qualify or disqualify a visitor for the segment.

You use the "Segment Filtering" forms in Engage to categorize groups of visitors based on the visitor attributes, history attributes, and history definitions created by the developers.

Segments are the key to personalization with Engage. When visitors browse your site, the information they submit is used to qualify them for segment membership. When the site displays a page with a recommendation or promotion, Engage determines which segments a visitor belongs to and displays the product recommendations or promotional messages that are designated for those segments.

For detailed information on segments, see Chapter 18, "Grouping Visitors into Segments with Engage."

17.3 Making Recommendations to Segmented Visitors

You create "Recommendation" assets and then configure them by rating assets based on their importance to the segments that you have created.

Recommendations are assets that determine which products or content should be featured or "recommended" on a site page. These assets are rules that are based on the segments the visitors qualify for, and, in some cases, relationships between the product or content assets.

Recommendations have templates. A recommendation returns a list of assets to its template when the template is rendered on a site page. The items in a list of recommended assets are rated according to their importance to the current visitor based on the segments that the visitor belongs to.

For detailed information on recommendations, see Chapter 19, "Creating and Configuring Recommendations with Engage."

17.4 Basing Promotions on Buying Patterns

Promotions are assets that define an offer of value (a discount) to the visitors based on the products that the visitor is buying and the segments that the visitor qualifies for. This value can be offered in several ways:

- A discount off the purchase price of the promoted products
- A discount off the entire value of the shopping cart
- A discount off shipping charges
- A combination discount: a shipping discount with a price or cart discount

Promotions use the same templates as recommendations. You decide which recommendation the promotion overrides, and Engage uses that recommendation's template to render the promotion on the site page.

For detailed information on segments, see Chapter 20, "Creating Promotions with Engage."

18

Grouping Visitors into Segments with Engage

Segments are assets that categorize visitors into groups on the basis of visitor data that you gather. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting values that qualify or disqualify a visitor for the segment.

This chapter describes segments and presents procedures for creating them. It includes the following sections:

- Section 18.1, "About Segments"
- Section 18.2, "About the Segment Forms"
- Section 18.3, "Creating Segments"
- Section 18.4, "Creating and Using the ContentQuery Asset"
- Section 18.5, "Sample Segment Assets"
- Section 18.6, "Previewing a Segment on a Web Page"
- Section 18.7, "Publishing Segments"
- Section 18.8, "After You Publish"

18.1 About Segments

Segments are used to create recommendations and promotions. The segments determine which content in the recommendations and promotions visitors qualify for and display that content to the visitors.

Segments are the key to personalization and marketing with Engage. You, as a marketer, create the visitor segments that the site pages depend on because you know which marketing messages should be associated with specific visitor segments.

When you create a segment, you specify filtering criteria that a visitor must match in order to be included as a member of that segment. This is comparable to when database or site administrators create a database query, and they specify parameters that a database record must match in order to be included in the results of the query.

This section contains the following topics:

- Section 18.1.1, "Segments and Visitor Data Assets"
- Section 18.1.2, "Developing Segments: Process Overview"

18.1.1 Segments and Visitor Data Assets

You build segments by using the visitor data assets as filtering criteria. There are three kinds of visitor data assets: visitor attributes, history attributes, and history definitions.

- **Visitor attributes** hold types of information that specify one characteristic only. For example, there can be attributes named *years of experience*, *job description*, or *number of children*.

  When visitors change the data, the new data overwrites the old. For example, if a visitor changes her job description from *analyst* to *marketing specialist*, there is no record of the fact that the visitor used to be an analyst.

- **History attributes** are individual information types that you group together to create a single type of historical record.

- This historical record is a **history definition**. For example, a history definition called *purchases* could be made up of the history attributes *SKU #*, *itemname*, *quantity*, and *price*.

  Engage treats the data recorded as a history definition as a whole unit of information. It assigns a timestamp to and stores each instance of the data, which means that you can create segments based on counts or sums of history definitions.

Developers create the visitor data assets based on the kinds of information that the marketing and design teams want to collect and analyze. You and the other marketers can use those assets to create segments that categorize your visitors, and the developers program your site pages to collect and store visitor information.

18.1.2 Developing Segments: Process Overview

There are five general steps for creating segments:

1. **Planning.** A cross-functional design team including developers and marketers determines the data you want to gather about your site visitors.

2. **Creating visitor data assets.** The developers create and define the necessary visitor attributes, history attributes, and history definitions using the forms in Engage.

3. **Creating segments.** You (the marketers) use the "Segment" forms in Engage to categorize visitors on the basis of visitor attributes, history attributes, and history definitions.

4. **Collecting visitor data.** The developers program the appropriate site pages to collect and store visitor data. For example, they might create an online registration form for visitors to fill out with information that qualifies them for segments. When visitors browse your site, the information they submit is stored in the Sites database.

5. **Segmenting visitors.** Now when visitors browse your site, the information they submit is used to qualify them for segment membership. The promotional messages and recommended products are personalized based on the segments that visitors qualify for.

18.2 About the Segment Forms

You will use forms on two when creating segments, the Content tab and the Detail tab. This section describes these tabs.

This section contains the following topics:

-

-
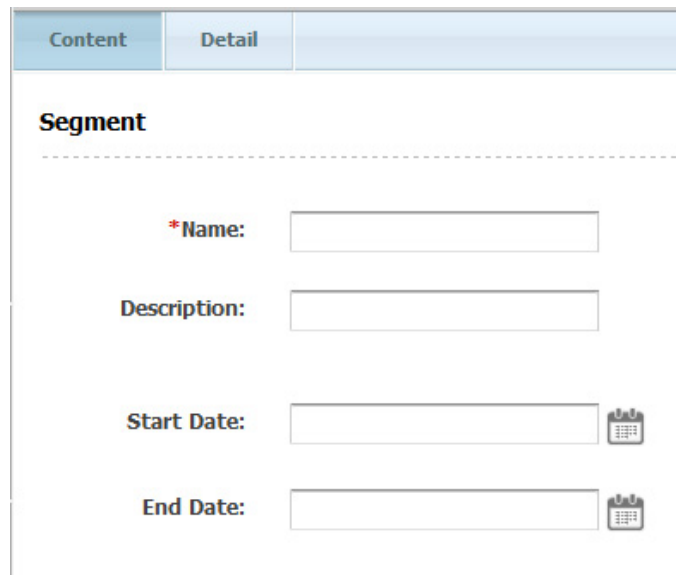
18.2.1 Segment Content Tab

The Segment Filtering Criteria Content tab displays the visitor data assets that you can use to create segments. In this form you select the criteria that will define your segment.

Figure 18–1   Content Tab of New Segment Asset

When viewing an existing segment, the stored information is displayed:

Figure 18–2   Content Tab of Existing Segment Asset

Existing segments are easily modified. From the menu bar select **Edit**, then from the menu select **Edit**. The form as shown in Figure 18–1 is shown in the tab, but populated with the segment's stored data:

Figure 18–3   Content Tab of Existing Segment Asset Available for Edits

18.2.2 The Segment Detail Tab

While you're creating a segment, Engage displays each condition (criterion) that you add to the segment in a form similar to the following:

Figure 18–4   Detail Tab of Existing Segment Asset

As you add criteria to a row, you create a more inclusive segment. In the preceding form, the visitor can be one who is aged 30 to 39 and has an income of over $100,000. In other words, you add more factors that can qualify a visitor for a segment by working across the table, adding criteria to the same row.

As you add criteria to a column, you create a more restrictive segment. In the following example, a visitor belongs to the segment only if both the criteria are true:

Figure 18–5   Editing Filtering Criteria

Add restrictions to a segment by working down the form, adding them to the criteria. In the above image, the filter is for people who are aged 30 to 39, and are single.

In summary, segments broaden as you add OR criteria and narrow as you add AND criteria.

This section contains the following topics:

- Section 18.2.2.1, "Categories"
- Section 18.2.2.2, "The Shopping Cart Criterion"

18.2.2.1 Categories

The visitor data assets in the Segment Filtering Criteria form are organized within categories which are viewable in the mega menu by clicking the eye icon.

You can start typing a criteria in the field (for example, typing S suggests "Street Address," "State or province name," and "Shopping Cart." Typing Sh suggests only "Shopping Cart." Additionally, the mega menu is available by selecting the eye icon. The mega menu displays all visitor data assets grouped into categories.

Because visitor data assets are so varied, developers assign them to categories to organize them. (Developers create categories when they define visitor data assets.) The **Profile** category, for example, details visitor attributes such as age and income, that are related to personal information about the visitors. For more information on the mega menu, see the different steps in Section 18.3, "Creating Segments."

> **Note:**   The actual categories of visitor data assets will likely differ for your installation, depending on the installation options and what your developers have defined. See your developers if you need information about categories or visitor data assets.

18.2.2.2 The Shopping Cart Criterion

Shopping Cart is listed with the categories on the segment filter forms but the shopping cart is a special, default feature rather than a category of attributes.

Figure 18–6   Shopping Cart Criterion in Filtering Criteria

You can use the Shopping Cart criterion to create segments based on the following kinds of conditions:

- The total value of all the products in the shopping cart
- Whether a specific product is in the shopping cart
- Whether a certain number of products are in the shopping cart
- Whether a certain number of specific products is in the shopping cart

If you want to implement a promotion based on the current state of a visitor's shopping cart, use this form to build a segment and then use the segment in the promotion.

The Shopping Cart is always available for defining your segments. Therefore, even before your site developers create visitor attributes or history definitions, you can create segments defined by shopping cart information.

18.3 Creating Segments

Before you create segments, be sure the following tasks have been completed:

- The marketing, design, and development teams met to determine the kinds of data that you want to collect about your visitors.
- The developers created the visitor attributes, history attributes, and history definitions that the cross-functional team decided are necessary.
- You (the marketers) obtained a list or overview of the visitor data assets that were created and you understand what they mean and how they are categorized.

This section contains the following topics:

- Section 18.3.1, "Step 1: Name and Define the Segment"
- Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes"
- Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions"
- Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria"

18.3.1 Step 1: Name and Define the Segment

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites Contributor interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Segment**.

> **Note:** If **New Segment** does not appear in the New menu, stop here. You do not have the permissions to create segments. Consult your administrator for more information on your permissions.

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.

Figure 18–7   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. For more information, see Chapter 16, "Workflow."

4. Once the users are selected as assignees, add the general information regarding the segment.

The tab displays the segment asset's **Content** tab:

Figure 18–8   Content Tab of New Segment Asset

In the **Name** field, enter a unique, descriptive name for the segment. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

In the **Description** field, enter a brief description of the segment. You can enter up to 128 alphanumeric characters.

(Optional) Assign a start and/or end date to the segment asset. For more information about start and end dates, see Section 7.3.2, "About Future Preview."

5. Click the **Detail** tab.

The tab displays the Filtering Criteria form. The categories of visitor attributes and history definitions you can use to build your segment are listed in the drop-down menu, and also in the mega-menu opened by clicking the mega menu icon (Figure 18–10).

Figure 18–9   Filtering Criteria Form on the Detail Tab

Figure 18–10   Mega Menu Icon

Note that filtering on text strings is case-sensitive unless it is explicitly set not to be so.

Do one of the following:

– If you want to create a segment based on buyer contact information, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

– If you want to create a segment based on the user profile, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

– If you want to create a segment based on buyer history, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

– If you want to create a segment based on a history definition, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

– If you want to create a segment based on the shopping cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.2 Step 2: Create Segment Filtering Criteria with Visitor Attributes

1. In the Filtering Criteria form on the **Detail** tab, click the icon for the mega menu for the attributes.

Figure 18–11   Mega Menu Icon

Engage displays a list of the attributes in the category.

2. Click the name of the attribute that you want to use to define the segment.

   The form displays constraint fields that are meaningful for that attribute.

3. Use the form to set the attribute values that include a visitor in the segment or exclude a visitor from the segment.

   For example, if the attribute is Age and you want to include people between the ages of 20 and 24, set the values as follows:

Figure 18–12   Age Attribute and Values as a Filter

Note that certain attributes have pre-determined ranges. In this case, the age ranges available are already set.

To exclude people who are in that age range, select the **Exclude** checkbox. Alternately, you can set the values as follows:

Figure 18–13   Age Attribute and Values as a Filter

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

18.3.3 Step 3: Create Segment Filtering Criteria with History Definitions

1. In the Filtering Criteria form, open the mega menu and select **Purchase summary** from the Buyer History section.

   The Filtering Criteria form for the purchase is displayed. It shows the first history definition in the category. For example:

Figure 18–14   Purchase Summary Filtering Fields

It has three general areas that you use to restrict or filter items:

- The first row allows a filter the number of items purchased or total value of items purchased.

- The second row allows you to select the overall purchases, the most recent purchase, or a purchase within a certain time period.

- The checkboxes allow you to filter based on certain items, certain store IDs, certain quantities, or specific amount of sales.

2. Use one or more of the following options to create simple or complex criteria by using all three areas in the Filtering Criteria form to restrict or filter one item.

This section contains the following topics:

- Section 18.3.3.1, "Filtering Based on a Total"

- Section 18.3.3.2, "Filtering Based on a Count"

- Section 18.3.3.3, "Filtering Based on the First Time a History Definition Was Recorded"

- Section 18.3.3.4, "Filtering Based on the Most Recent Time a History Definition Was Recorded"

- Section 18.3.3.5, "Adding a History Attribute to Further Define the Segment"

- Section 18.3.3.6, "Adding Products to Further Define the Segment"

18.3.3.1 Filtering Based on a Total

You can define the segment based on a total, such as the total amount spent, a total price, or a total number of items.

For example, a site developer could create a history definition named Purchase History, which would be a historical record of purchases made by site visitors. One of the history attributes in this definition could be **number of items**. Using this history definition, a marketer could create a segment based on the total number of items purchased by site visitors.

To define a segment based on a total, complete the following steps:

1. At the top of the form, select the **Total** option, and set the values that include a visitor in the segment or exclude a visitor from the segment.

   For instance, the example history definition could be set to include visitors who have purchased 10 items or more:

Figure 18–15   First Row of Purchase Summary

| Total | Number of items | is greater than or equal to | 10 |

2. In the next row, select **A specific time period**. Two date fields will appear. Specify the time period to use for the total.

   For example, to include visitors who bought the specified number of items during the first six months of the year, the time option values for the **Purchase history** history definition could be set as follows:

Figure 18–16   Specific Time Period Entry for Purchase Summary

Purchase summary	👁			Exclude ✖
Total	Number of items	is greater than or equal to	10	
A specific time period	between	2012-01-01 00:00:00 📅	and 2012-06-30 00:00:00 📅	

3. (Optional) To further restrict this criterion by adding a history attribute to it, go to Section 18.3.3.5, "Adding a History Attribute to Further Define the Segment".

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

18.3.3.2 Filtering Based on a Count

You can define the segment based on the total number of times this history definition was recorded for a visitor.

For instance, using the **Purchase history** history definition described in Section 18.3.3.1, "Filtering Based on a Total," a marketer could define a segment based on the number of times **Purchase history** was recorded for a visitor. The effect of this criterion is that Engage would consider how many times a visitor purchased anything instead of considering what they bought or how much they spent.

To define a segment based on a count, complete the following steps:

1. Select the **Count** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

   For example, the **Purchase history** history definition could be set to include visitors who have purchased something (anything) at least five times:

| Count | is greater than or equal to | 5 |

2. In the next row, select **A specific time period**. Two date fields will appear. Specify the time period to use for the total.

For example, to include visitors who bought the specified number of items during the first six months of the year, the time option values for the **Purchase history** history definition could be set as follows:

Figure 18–17 Specific Time Period Entry for Purchase Summary

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Section 18.3.3.5, "Adding a History Attribute to Further Define the Segment."

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

    – If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

    – If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

    – If you selected Shopping Cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.3.3 Filtering Based on the First Time a History Definition Was Recorded

You can define the segment based on the first time the history record was recorded for visitors.

For instance, using the **Purchase history** history definition described in Section 18.3.3.1, "Filtering Based on a Total" a marketer could define a segment based on the first time the visitor purchased something—in other words, the first time a **Purchase history** record was recorded for the visitor.

To define the segment based on the first time the definition was recorded, complete the following steps:

1. Select the **Earliest date recorded** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

    For example, the **Purchase history** history definition could be set to include visitors who purchased something on or before January 1, 2012:

Figure 18–18 Earliest Date Recorded

2. Use the Calendar icon to select a date. The default time added is 01:00; this value can be changed by typing it in the field.

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Section 18.3.3.5, "Adding a History Attribute to Further Define the Segment."

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

   – If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

   – If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

   – If you selected Shopping Cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.3.4 Filtering Based on the Most Recent Time a History Definition Was Recorded

You can define the segment based on the last time (the most recent time) the history definition was recorded for a visitor.

For instance, using the **Purchase history** history definition described in Section 18.3.3.1, "Filtering Based on a Total" a marketer could define a segment based on the most recent time the visitor purchased something—in other words, the last time a **Purchase history** record was recorded for the visitor.

To define the segment based on the last time the history definition was recorded, complete the following steps:

1. Select the **Latest date recorded** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

   For example, to include visitors who have purchased something since January 1, 2012, the **Purchase history** values could be set as follows:

Figure 18–19   Latest Date Recorded

2. Use the Calendar icon to select a date. The default time added is 01:00; this value can be changed by typing it in the field.

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Section 18.3.3.5, "Adding a History Attribute to Further Define the Segment."

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

   – If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

   – If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

   – If you selected Shopping Cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.3.5 Adding a History Attribute to Further Define the Segment

You can add a history attribute to create a more complex segment—one that further restricts the count, total, first, or last record by taking a specific attribute into consideration.

To add a history attribute to further define the segment, complete the following steps:

1. Select and configure one of the four options in the first line of the form (**Total**, **Count**, **Earliest date recorded**, or **Latest date recorded**). If you need help with this step, go to one of the following procedures:

   – Section 18.3.3.1, "Filtering Based on a Total"

   – Section 18.3.3.2, "Filtering Based on a Count"

   – Section 18.3.3.3, "Filtering Based on the First Time a History Definition Was Recorded"

   – Section 18.3.3.4, "Filtering Based on the Most Recent Time a History Definition Was Recorded"

2. Under the attribute list for this criterion, **Product list**, **Store ID**, **Number of items**, and **Amount of sales** each have a checkbox. click the history attribute that you want to use as a filter. Typically this list will include items such as Product list, Store ID, Number of items, and Amount of sales.

   As a checkbox is selected, constraint fields that are meaningful for that attribute display. Clicking more than one attribute, or an attribute more than once, will display constraint fields for each time an attribute is clicked.

3. Use the constraint fields to set the attribute values that further constrain the criterion. For example:

Figure 18–20   Store ID Constraint Field

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

   – If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

   – If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

   – If you selected Shopping Cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.3.6 Adding Products to Further Define the Segment

You can add products to create a more complex segment—one that further restricts the count, total, first, or last record by taking specific products into consideration—if the history definition that you use to define this segment has a product list history attribute.

To add a product to the segment definition, complete the following steps:

1. Select and configure one of the four options at the top of the form (**Count**, **Total**, **Earliest**, or **Latest**). If you need help with this step, go to one of the following procedures:

    – Section 18.3.3.1, "Filtering Based on a Total"

    – Section 18.3.3.2, "Filtering Based on a Count"

    – Section 18.3.3.3, "Filtering Based on the First Time a History Definition Was Recorded"

    – Section 18.3.3.4, "Filtering Based on the Most Recent Time a History Definition Was Recorded"

2. Under the attribute list, select **Product list**.

    The form displays a drop zone.

Figure 18–21   Product List Displaying Drop Zone

3. Use the Content Tree to select products and drag them to the drop zone.

Figure 18–22   Product List WIth Products
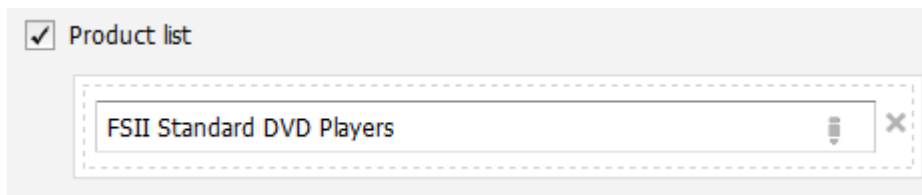
Once the is added, the criterion will only select those purchases made that include the item in the list.

4. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

   – If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

   – If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

   – If you selected Shopping Cart, go to Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

18.3.4 Step 4: Define the Segment with Shopping Cart Criteria

1. In the Filtering Criteria form, select the **Shopping Cart** category.

   Engage displays the Shopping Cart criterion.

Figure 18–23   Specific Time Period Entry for Purchase Summary

2. To define this segment based on the total value of the items in a visitor's shopping cart, select the first option and then set the values. For example, to include visitors who have at least $50 worth of products in their carts, set the values as follows:

Figure 18–24   Total Value of Items In Shopping Cart

   To define this segment based on the total number of items in the visitor's shopping cart, select the second option and then set the values. For example, to include visitors who have three or more items in their carts, set the values as follows:

Figure 18–25   Total Count of Items in Shopping Cart

3. To restrict the item count or cart value to specific products in the catalog, select **Restrict to specific products** in the pull-down menu on the next line.

   The Drop Zone will appear. Drag and drop the product that you want from the Content Tree into the Drop Zone.

4. Add other criteria as needed. From the menu bar, select **Content**, then select **Save**. The criterion is added to the segment and the segment is saved.

5. Do one of the following:

      –   If you selected a visitor attribute category, go to Section 18.3.2, "Step 2: Create Segment Filtering Criteria with Visitor Attributes."

      –   If you selected a history definition category, go to Section 18.3.3, "Step 3: Create Segment Filtering Criteria with History Definitions."

18.4 Creating and Using the ContentQuery Asset

One asset that can make using multiple other assets together easier is the ContentQuery asset. This asset is the returned value of a search of assets that is defined within the ContentQuery asset. Using this, for instance, you can create an asset that only returns content items with a certain tag or certain asset type. There are many ways to write the search parameters, making it easy to use as a dynamic search of a certain type of content.

To create a ContentQuery asset

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites Contributor interface.

2. In the menu bar, select **Content**, then select **New**, and then select **Content Query**.

> **Note:** If **New ContentQuery** does not appear in the New menu, stop here. You do not have the permissions to create content queries. Consult your administrator for more information on your permissions.

The **Content** tab of the ContentQuery asset is displayed.

Figure 18–26 Content Tab of ContentQuery Asset

In the **Name** field, enter a unique, descriptive name for the segment. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

In the **Description** field, enter a brief description of the segment. You can enter up to 128 alphanumeric characters. This is optional.

In the **List Size** field, enter the length of the list to return. This is optional.

In the **Sort Field** field, select the field (Name, Asset Type, Locale, Modified) that the returned assets are sorted on. This is optional.

In the **Sort Order** field, select the order (Ascending, Descending, or Random) to display the items. This is optional.

3. Click the **Query** tab.

The **Query** tab of the ContentQuery asset is displayed.

Figure 18–27   Advanced Search Fields for ContentQuery asset

This is where the search parameters are created. Wild cards (* ?) are allowed as in any other asset search; no field is required.

At the top, select **Any of these words** or **All of these words** and enter the search text.

In **Asset Name**, enter a name (or partial name) of an asset.

In **Description**, enter a full or partial description.

In **Tags**, enter the tags assigned for assets.

In **Id**, enter the ID for assets.

In **Locale,** enter the location assigned to assets.

In **Author**, enter the person who created the asset.

In **Modified**, select the time frame that the asset was last modified.

In **Asset Type**, select the type of asset.

4. Once you have completed the search parameters, click **Run Advanced Search**. The results of the selected parameter search will appear in the docked panel to help you see that the parameters are correct for your needs.

Figure 18–28   ContentQuery Advanced Search Query Results
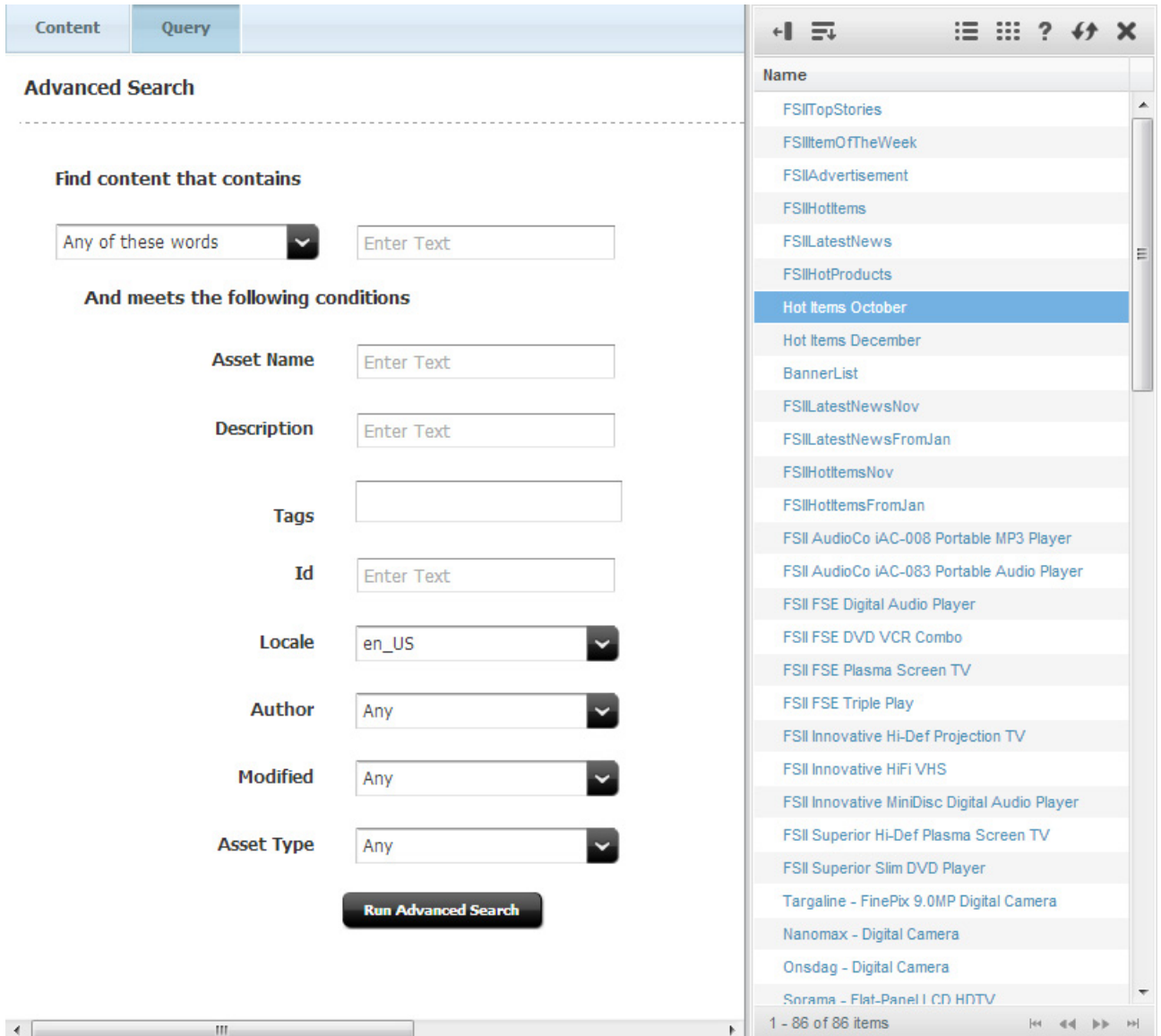
If necessary, modify the parameters of the advanced search.

The advanced search is available in both the Edit mode and Inspect mode of the content query asset.

5. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

18.5 Sample Segment Assets

If you have installed the sample sites, the FirstSite II sample site comes with one sample segment asset: AffluentYoungSingles. This segment is designed to work in concert with the sample Recommendation and Promotion assets. Use these sample segments as templates for creating segment assets for your site.

18.6 Previewing a Segment on a Web Page

Once a segment is created and incorporated into the web site, it can be useful to preview it. It is especially useful when the function of the segment is to display different assets depending on the visitor. This is done with the **Preview with Segment** button in Web mode.

To use Preview with Segment, perform these steps:

1. View the web site or an appropriate asset containing the segment to preview in Web mode.

2. Click the **Preview** icon.

Figure 18–29   Preview Icon

The page will display in preview. The toolbar will change and different icons will appear.

3. Click the **Preview with Segment** icon.

Figure 18–30   Preview with Segment
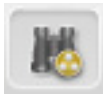
4. When clicked, a menu displaying the available segments displays. The first entry will be No Segments, an option to preview with no segments.

Figure 18–31   Preview with Segment Menu
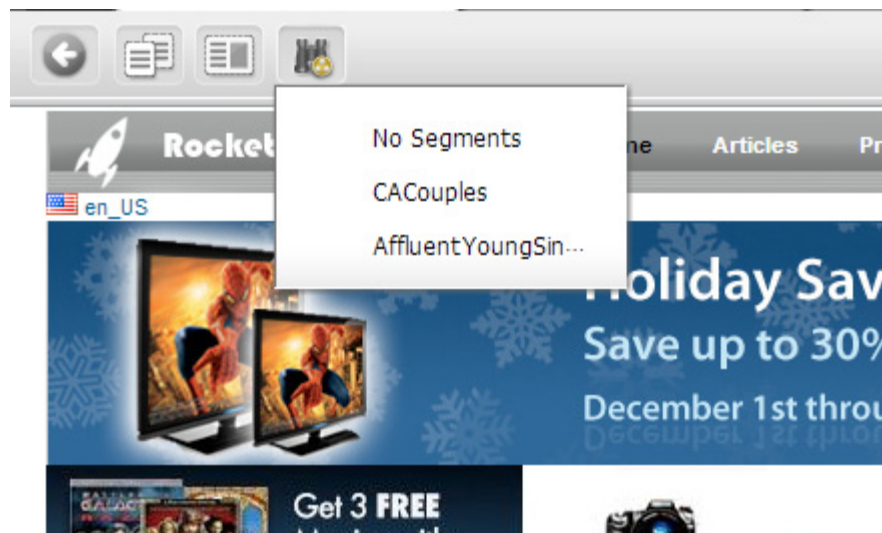
5. Select a segment. The preview will refresh to display with the selected segment in place.

18.7 Publishing Segments

When your segments are ready, you must approve them so they can be published to your delivery system. Engage can then use the segments to assess visitors and recommend the appropriate items to them.

Be sure to examine or inspect your segments to verify that you configured them correctly before approving them for publishing.

For more information about approving and publishing assets, see Chapter 14, "Approval for Publishing."

18.8 After You Publish

After you have created, verified, and published the segments, you must assign ratings to the products and content that are significant to members of each segment. For details, see Chapter 19, "Creating and Configuring Recommendations with Engage."

You can also create promotions after you have created segments. For more information, see Chapter 20, "Creating Promotions with Engage."

19

Creating and Configuring Recommendations with Engage

Recommendations are assets that determine which other assets are featured or recommended on a site page. Recommendations calculate which assets to recommend based on the segments the visitors qualify for, and, in some cases, context-based relationships between assets (for example, movies related to each other by genre).

After you create the Recommendation assets, (typically, marketing people create Recommendation assets), you configure them by rating their child assets based on their importance to the segments that visitors qualify for. Assets are recommended (or are not recommended) based on those ratings. Additionally, the Related Items recommendation defines relationships between assets that allow for cross- or up-selling items according to how those items are related to one another. You determine which assets have those relationships.

This chapter contains the following sections:

- Section 19.1, "Recommendation Assets"
- Section 19.2, "Asset Selection Factors"
- Section 19.3, "Asset Recommendation Processes"
- Section 19.4, "Creating Recommendation Assets"
- Section 19.5, "Editing Recommendation Assets"
- Section 19.6, "Configuring Assets to Be Recommended"
- Section 19.7, "Verifying Recommendation Assets"
- Section 19.8, "Publishing Rated Flex Assets"

19.1 Recommendation Assets

A recommendation asset collects, assesses, and sorts assets, and then recommends the most appropriate of these assets to the current visitor. How does it determine which assets are the most appropriate? By consulting the list of segments that the visitor belongs to and any confidence set in the recommendation for each asset. (For information about confidence, see Section 19.2.2, "Confidence.")

You create segments and then rate the flex assets for their importance to each segment. When a recommendation asset is invoked from a site page, Engage determines which segments the current visitor qualifies for, and then selects the assets that are identified by the recommendation to have the highest rating for those segments. These are the assets that are recommended to the visitor.

Engage provides the following types of recommendations:

- **Static Lists** – operates in two modes, List and Recommendation:

    - In List mode, a Static Lists recommendation holds and returns a single static, preselected list of assets regardless of segments (or whether segments apply at all). Confidence values are automatically assigned to assets on the list based on their position on the list; the first asset receives a confidence value of 100%, the next one 99%, and so on, in descending order.

    - In Recommendation mode, a Static Lists recommendation holds and returns static, preselected lists of recommended assets when the visitor qualifies for segments defined in the recommendation, and also when no segments apply.

        When a template invokes the recommendation, the recommendation returns the assets on the static lists. For each asset that you add to a segment's static list, you can assign a confidence value for In Segment and Out of Segment ratings. (A variant of this type of recommendation was formerly known as manual.)

    You create a static lists recommendation by selecting assets from your bookmarks and adding them to each segment's list (recommendation mode) or the common list (list mode). Because this is a static lists recommendation, the assets in the list(s) remain the same until you change them (or delete them from the database).

- **Dynamic Lists** – references a special asset called a CSElement asset, which your developers have coded as a type of program known as an element. When a template invokes the Dynamic Lists recommendation, it executes the element, which returns a list based on the conditions defined in the element. For example, you could create a recommendation named New Products whose referenced element selects only those Product assets that have been added to the database in the past five days.

    You create a Dynamic Lists recommendation by selecting a CSElement asset (which contains the logic for generating the list) in the tree. You can then test the selected element by displaying the current list results.

    As its name implies, this type of recommendation is dynamic: each time it is invoked by a template, the recommendation executes the element, which regenerates the list, based on the current state of the database.

- **Related Items** – holds the name of a relationship between flex assets that are related to one another based on context (for example, similarly themed movies). When a template invokes a Related Items recommendation, assets are returned (recommended) only if they are manually configured to have the relationship named by the recommendation with the asset that is currently displayed on the page.

    Typical relationships between assets are cross-sell and up-sell relationships. For example, a Related Items recommendation named Cross-Sell displays a list of science fiction movies on rendered pages that display suspense movies because the marketers determined that people who buy science fiction movies also buy suspense movies.

    You create a Related Items recommendation by naming it and specifying that it is a Related Items recommendation. You must then determine which flex assets should have the relationship represented by this recommendation with other flex assets. You assign these relationships in the parent asset's New or Edit form, and you assign a confidence value to each asset on the list for each segment.

When the recommendation is rendered by its template, Engage does two things. First, Engage identifies which assets have the relationship named by the recommendation with the currently displayed asset. Additionally, Engage examines the ratings for those assets to determine whether those assets are relevant for the current visitor.

The functionality of each of the available types of recommendation assets is summarized in the following table:

Parameter	Static Lists (List Mode)	Static Lists (Recommendation Mode)	Dynamic Lists	Related Items
Ratings (by segment)	Yes	Yes	Yes	Yes
Confidence (by segment)	Determined by asset's position in the list; no segment distinction.	Yes	Yes	Yes
Selection Criteria	Highest only	Highest, Random	Highest, Random	Highest, Random
Sort Order	Descending by confidence only	Yes	Yes	Yes
Options	■ Can return the children of recommended assets ■ Can be overridden by promotions ■ Can apply to all or select asset types	■ Can return the children of recommended assets ■ Can be overridden by promotions ■ Can apply to all or select asset types	■ Can return the children of recommended assets ■ Can be overridden by promotions ■ Can apply to all or select asset types	■ Can return the children of recommended assets ■ Can be overridden by promotions ■ Can apply to all or select asset types
Build	Built by manually adding assets to the list and setting their order in the list.	Built by manually assigning assets to and setting their confidence values for each segment's list.	Built in realtime by code in the assigned CSElement asset.	Built by adding assets to each segment's list in the parent asset's New and Edit forms.

19.2 Asset Selection Factors

When Engage determines which assets are the most appropriate to recommend to the current visitor through a given recommendation, it multiplies each asset's **individual rating** in the segment by the **confidence** value assigned to the asset in the recommendation to obtain the asset's **weighted** rating. The following sections describe these concepts in detail.

This section contains the following topics:

- Section 19.2.1, "Ratings"
- Section 19.2.2, "Confidence"
- Section 19.2.3, "Selection Criteria"

■ Section 19.3.4, "Related Items"

19.2.1 Ratings

An asset's individual rating establishes how important the asset is to the visitor belonging to a particular segment. You manually assign the rating to the asset in the asset's Create or Edit view.

> **Note:** Only flex assets can be rated for segments. Basic assets do not support ratings and are ignored by the recommendation if placed in it. Consult your administrator to make sure you are only placing flex assets in the recommendations you create.

You can assign three kinds of ratings to an asset:

Rating	Description
In Segment	Used when the current visitor is a member of a specific segment.
Out of Segment	Used when the current visitor is not a member of a specific segment.
When no segment ratings apply	Used when no segments are defined for the current site, or the asset is placed in a recommendation that does not recognize segments (Static Lists recommendation in List mode).

There is also a system default rating for flex assets or flex parents that have not been assigned any of these specific ratings. The system default is set to 50 unless you and your development team decide to change it (through an XML or JSP object method on your site pages). The system default represents the average or middle point in the rating scale for your site, which is why it is recommended that you keep the system default rating set to 50.

Range of Ratings

The valid range for individual ratings is 0 through 100. The individual values of 0 and 100 are special and affect an asset's rating as follows:

■ An asset rating of 0 for a segment tells Engage to never recommend the asset to a member of the segment. For example, you might want to make sure that your site never recommends PCs or PC software to members of a segment named Macintosh Users.

■ An asset rating of 100 for a segment tells Engage to always recommend the asset to a member of the segment.

Inheritance of Ratings

Flex assets and flex parents inherit In Segment, Out of Segment, and When No Segment Ratings Apply (fallback) ratings from their parents. The asset's or parent's **final rating** is the average of its individual rating (which is the system default rating if it has no individual rating) plus its inherited rating. The asset's inherited rating is the final rating of its parent, as illustrated by the following formula:

```
Final rating= individual rating+inherited rating/2
```

where,

individual rating = system default if custom rating is not specified

inherited rating = parent's final rating

For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	70	no rating inherited	**70**
Asset Parent B (child of Asset Parent A)	60	70	(60 + 70) / 2 = **65**
Asset 1 (child of Asset Parent B)	95	65	(95 + 65) / 2 = **80**

If the flex asset inherits a rating for a segment that it does not have an individual rating for, Engage averages the inherited rating with the system default rating (which is typically 50) to determine the final rating. For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	80	nothing inherited	**80**
Asset Parent B (child of Asset Parent A)	none, so the system default of 50 is used	80	(50 + 80) / 2 = **65**
Asset 1 (child of Asset Parent B)	70	65	(70 + 65) / 2 = **67.5**

Because the values of 0 and 100 have special functions, the following rules apply to them when inheritance is concerned:

- If either the individual or the inherited rating is 0, the final rating is 0.

- If either the individual or the inherited rating is 100, the final rating is 100 unless the other value is 0.

If the current visitor belongs to more than one segment and the asset has ratings for those segments, the following rules apply:

- The highest of the ratings is the final rating.

- If one of those ratings is 0, the final rating is 0.

19.2.2 Confidence

Confidence in Engage indicates how likely your visitors are to want to view a particular piece of content; thus, Engage uses confidence values assigned to each asset in a recommendation to decide how often a piece of content is to be recommended to the visitor. When a recommendation assesses an asset against a given segment, the asset's rating (either individual or final, depending on the scenario) is multiplied by the confidence value for that segment in the recommendation to produce the asset's weighted rating. The weighted rating is then used by the recommendation to determine how relevant the asset is to the current visitor. Confidence is therefore a

scaling factor for the asset's rating. Keep in mind that neither an asset's individual rating nor its confidence value alone can be used to recommend the asset to the visitor; the weighting process applies to all assets assigned to a given recommendation.

Note that when an asset is assessed by multiple recommendations, its respective weighted ratings are calculated independently of one another; that is, the confidence values assigned to the asset in one recommendation do not affect the asset's rating visible to the other recommendation. For example, if an asset has an individual rating of 80, a 60% confidence for Segment A in Recommendation 1, and a 90% confidence for Segment A in Recommendation 2, both recommendations use the asset's individual rating of 80 when calculating its respective weighted rating.

The way confidence is assigned depends on the type of recommendation:

- For Static Lists recommendations in List mode, Engage automatically assigns a confidence value to each asset in the list based on the asset's position in the list: the first asset on the list gets a value of 100%, the second 99%, the third 98% and so on, in descending order.

- For Static Lists recommendations in recommendation mode, you manually assign confidence values to assets for each segment in the recommendation via the recommendation's New or Edit forms.

- For Related Items recommendations, you manually assign confidence values to assets for each segment in the recommendation via the parent asset's New or Edit form.

- For Dynamic Lists recommendations, confidence values are returned to Engage by the selected CSElement asset and assigned to the respective assets automatically.

Range of Confidence Values

Because confidence is a scaling factor, it is presented as a percentage. The valid range of percentage values is 0 through 100. The values of 0% and 100% affect an asset's rating as follows:

- A confidence value of 0% means the asset will never be returned by that recommendation because the asset's rating is multiplied by 0% (0), which results in a rating of 0.

- A confidence value of 100% means the asset's rating is not scaled or affected by the confidence at all because the asset's rating is multiplied by 100% (1).

Inheritance of Confidence Values

Typically you designate relationships between flex assets and assign a confidence value to that relationship at the parent level because assets inherit the confidence value assigned to their parents by the recommendation.

If the asset has more than one confidence value for the same recommendation, Engage uses the highest value (even if one of those values is 0); it does not average them.

19.2.3 Selection Criteria

Selection Criteria is a configuration option that allows you to specify how the Recommendation asset selects assets to be returned to the template that requests them.

> **Note:** List mode Static Lists recommendations do not support the Random selection criterion.

The method that you select for Selection Criteria determines how Engage selects assets from the database. There are two Selection Criteria methods:

- **Highest** – Engage selects the assets with the highest weighted rating for the current segments (that is, the segments that the current visitor belongs to).

- **Random** – Engage uses a weighted random algorithm (operating on the assets' weighted ratings) to select the assets from the list. Use this selection criterion to design a recommendation that rotates its message, keeping the recommended assets current or different each time a visitor returns to the site page. The selections are still based on the weighted ratings of the assets, however, because this is a weighted random algorithm. The higher the asset's rating for the current segment, the more likely it is to be chosen.

  For example, a template is coded to call a recommendation that uses the random selection criteria method for one asset. The possibilities include these three products:

Asset	Weighted Rating
Movie 123	95
Movie ABC	87
Movie RedYellowBlue	65

The probability of the product being selected is its rating divided by the sum of all the ratings (247). Therefore, Movie 123 has a 38% chance of being selected, Movie ABC has a 35% chance, and Movie RedYellowBlue has a 26% chance.

19.2.4 Sort Criteria

Sort Criteria is a configuration option that allows you to specify the order in which the template should render the assets returned to it by the recommendation. Sort Criteria are applied to the list of returned assets after the Selection Criteria method determines which assets to include in the list.

> **Note:**   List mode Static Lists recommendations do not support the Random selection criterion.

By default, you can sort the list of selected assets by the following attributes:

- **_ASSETTYPE_** – sorts the assets in the list alphabetically by asset type. For example, Article assets are first, then Image assets, and then the Product assets. (By default, assets are sorted in ascending order; you can reverse the sort order by selecting the **Descending** sort direction.)

- **_CONFIDENCE_** – sorts the returned assets by their confidence values.

- **_RATING_** – sorts the returned assets by their rating (individual or final, if applicable).

For each attribute, you can specify either ascending or descending sort order.

Sort options specific to the asset types available on your site are set up by your administrator. As an example, a site could be set up to include the following attribute types and corresponding attributes:

- **Product Attribute** – sorts by product attributes such as Price, SKU, or Color, and so on (depending on which product attributes are used in your system).

- **Content Attribute** – sorts by content attributes such as Headline, Filename, or Author, and so on (depending on which content attributes are used in your system). Note that content attribute means only those attributes that are used to define flex assets, not basic assets.

You can add as many sort options as you want to a recommendation. Engage uses these options in the order in which they appear on the recommendation form.

19.3 Asset Recommendation Processes

The following section explains how Engage determines which assets to pass to the template for each type of recommendation.

This section contains the following topics:

- Section 19.3.1, "Static Lists in List Mode"

- Section 19.3.2, "Static Lists in Recommendation Mode"

- Section 19.3.3, "Dynamic Lists"

- Section 19.3.4, "Related Items"

19.3.1 Static Lists in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table in Section 19.1, "Recommendation Assets" for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the Recommendation asset.

- If a template invokes a List mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0, regardless of the segment(s) the visitor belongs to.

- When a template invokes a List mode Static Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage recommends the assets with the highest weighted ratings (the random weighted algorithm is not supported in List mode).

The recommendation calculates the weighted ratings of the assets on its list as follows:

- It examines each asset on the recommendation's list to determine whether that asset has a No segment ratings apply rating.

- For each asset that has such a rating, Engage multiplies the rating by the confidence value for the asset (determined by the asset's position in the list). This value is the asset's weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90 x 0.75).

- Engage recommends the assets using the Highest selection criterion to determine which assets to return (the Random selection criterion is not supported in List mode). For more information on selection criteria, see the section Section 19.2.3, "Selection Criteria."

19.3.2 Static Lists in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Recommendation mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0 for the current visitor.

- When a template invokes a Recommendation mode Static Lists recommendation and it requests fewer assets than are on the recommendation's list, Engage uses the Selection Criteria method specified in the recommendation to determine which assets to return.

The recommendation calculates the weighted ratings of the assets on its list as follows:

- It determines which segments the current visitor belongs to.

- It examines each asset on the recommendation's list to determine whether that asset has a rating for any of the segments that apply to the current visitor.

- For each asset that has a rating for the segment(s) the current visitor belongs to, Engage multiplies the rating by the confidence value assigned in the recommendation for that asset. This value is the asset's weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90 x 0.75).

- If the Selection Criteria method is Highest, Engage recommends the assets with the highest weighted ratings. If the Selection Criteria method is Random, Engage uses a weighted random algorithm to select and return the recommended assets (based on their weighted ratings). For more information on selection criteria, see the section Section 19.2.3, "Selection Criteria."

19.3.3 Dynamic Lists

When a Dynamic Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Dynamic Lists recommendation but it does not ask for a specific number of assets, the recommendation returns all the assets it obtains from the generated list. Engage does not calculate weighted ratings in this case.

- If a template invokes a Dynamic Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage uses the **Selection Criteria** method specified in the recommendation to determine which assets to return.

Engage calculates the asset ratings as follows:

- It determines which segments the current visitor belongs to.

- It examines each asset returned by the element to determine whether that asset has a rating for any of the segments that apply to the current visitor.

- For each asset that has an appropriate rating, it multiplies the rating by the confidence value for that asset (from the element). This value is the asset's final rating. For example, if the rating is 90 and the confidence is 0.75, it calculates the

final rating to be 67.5 (90 x 0.75). If the element does not return a confidence value, Engage assigns a confidence value of 1 to each asset in the list.

- If the Selection Criteria method is Highest, Engage recommends the assets with the highest final ratings. If the Selection Criteria method is Random, Engage uses a weighted random selection to return the recommended assets.

19.3.4 Related Items

In this example, a template that displays a product description for a Movie asset named Movie 123 invokes a Related Items recommendation named Cross-Sell. The template for Cross-Sell asks for five assets that have the Cross-Sell relationship with Movie 123.

Engage does the following:

- Determines which segments the current visitor belongs to.

- Examines the Related Items section of the asset form for Movie 123 to determine which assets are listed for the Cross-Sell recommendation. It also examines the related assets for all parents of Movie 123.

- Creates a preliminary list of all Movie and Product assets that have the Cross-Sell relationship with Movie 123. (This list includes all the Product assets that inherited this relationship from their parents.) This list also determines the confidence value for each asset.

- Examines the Ratings section on the asset forms for all of the Movie and Products assets on the preliminary list.

- Constrains the preliminary list to include only those Movie and Product assets that have applicable ratings for the segments that the current visitor belongs to.

- Multiplies the rating by the confidence for each asset on the constrained list.

- If the Selection Criteria method is Highest, Engage recommends the five assets with the highest final ratings. If the Selection Criteria method is Random, Engage uses a weighted random algorithm (operating on the assets' weighted ratings) to return the five recommended assets.

19.4 Creating Recommendation Assets

Typically, marketing people create Recommendation assets and set confidence values for assets referenced by Static Lists and Related Items recommendations. (Confidence for Dynamic Lists recommendations is coded into the template that renders the assets being recommended).

Business users assign individual ratings to assets referenced by recommendations created by marketing.

This section contains the following topics:

- Section 19.4.1, "Recommendation Development Overview"

- Section 19.4.2, "Creating Static Lists Recommendations in List Mode"

- Section 19.4.3, "Creating Static List Recommendations in Recommendation Mode"

- Section 19.4.4, "Creating Dynamic Lists Recommendations"

19.4.1 Recommendation Development Overview

The basic steps for setting up recommendations are as follows:

1. Designers and developers meet with the marketing team to define all the marketing messages that you want to display on your site and to plan how to represent those messages using recommendation and promotion assets.

2. The designers and developers design and code templates for the recommendations. If Dynamic Lists recommendations will be used, they also write CSElement assets designed to generate dynamic lists.

3. Marketing then uses Engage Recommendation forms to create Recommendation assets (that is, name and configure the recommendations).

4. Using the Engage flex asset forms, you rate how important the assets are to each segment, and, therefore, to the individual visitors who become members of those segments. (Typically, you assign ratings to flex parents instead of to individual flex assets.)

   For each Related Items recommendation, you assign to flex assets the assets with relationships that are defined by that recommendation. (Typically, you specify relationships for flex parents instead of for individual flex assets.)

This section describes how to create and configure Recommendation assets (step 3 above). The section Section 19.6, "Configuring Assets to Be Recommended" describes how to assign ratings to assets and how to assign flex assets to flex parent assets via the relationships defined in a Related Items recommendation (step 4 above).

19.4.2 Creating Static Lists Recommendations in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table in Section 19.1, "Recommendation Assets" for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the Recommendation asset.

To create a Static Lists recommendation in List mode

Before you can assign assets to a recommendation, it is suggested that you add the source asset(s) to your bookmarks for easy retrieval during the creation of the recommendation.

> **Note:** You can click **Save** as you progress through the sections of the Recommendation form in this procedure to save the changes you have made up to and in that section.

1. Log in to WebCenter Sites, select the site you want to work with and the icon for the WebCenter Sites Contributor interface.

2. Find the assets to be included in the recommendation and bookmark them (which adds them to the **Bookmarks** node in the **My Work** tree):

   a. In the **Search** field, enter the desired search criteria (if any) and click the magnifying glass icon.

   b. If you want 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. Select the asset type to which you want to limit your search.

    c. In the search results list, select (Ctrl+click) the assets you wish to bookmark. In the Search tab's toolbar, click the **Bookmark** icon.

For more information on searching for and bookmarking assets, see Chapter 6, "Finding and Organizing Assets."

3. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

    a. 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. For more information, see Chapter 16, "Workflow."

    b. If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the Mode switch in the asset's toolbar.

The tab displays the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Name** section of the form is displayed first:

Figure 19–1   Recommendation Content Tab

> **Note:**   When creating or editing a Recommendation asset, you can switch between the sections of the form by clicking the name of the section you want to switch to.

- 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. For more information, see Chapter 16, "Workflow."

- If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

4. In the **Name** field, enter a unique, descriptive name for the list. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

5. In the **Description** field, enter a brief description of the list. You can enter up to 128 alphanumeric characters.

6. In the **Subtype** drop-down list, select a subtype for the recommendation. A subtype is a method of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list will display "(no subtype)". Consult your developers for information on available recommendation subtypes (if any).

7. In the Template drop-down list, select a template for the recommendation.

> **Note:** If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations on your site. Consult your developers for information on recommendation templates.

8. In the **Mode** field, select the **List** in the drop-down menu.

9. In the **Start Date** and **End Date** fields, select a date range in which the asset will display online. For more information on Start/End dates, see Section 7.3.1, "About Start and End Dates."

10. In the **Locale** field, select the location that the asset will display in online.

11. Select the **Options** tab.

Set the options appropriate for the list's intended purpose.

Figure 19–2 Recommendation List Options

If the **This recommendation applies to all asset types** checkbox is not marked, a menu will appear to select the asset types that the recommendation applies to (Figure 19–3).

Figure 19–3   Options, Showing Menu

Options:

☑ Bring back children of returned assets.

☑ Promotions can override this recommendation.

☐ This recommendation applies to all asset types.

`<Pick Type>` ⌄

In the **Selection** section of the Recommendation form, choose the selection criteria for the recommendation. For more information, see the section Section 19.2.3, "Selection Criteria."

In the **Sort** section of the Recommendation form, do the following:

a. In the Attribute Type drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

For more information, see the section Section 19.2.4, "Sort Criteria."

b. In the Attribute drop-down menu, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, _**ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

12. Select the **Detail** tab to add information regarding lists.

If the **Mode** selected on the Content tab was **List**, the **Detail** tab displays a single drop zone:

Figure 19–4 Recommendation Detail Tab Drop Zone
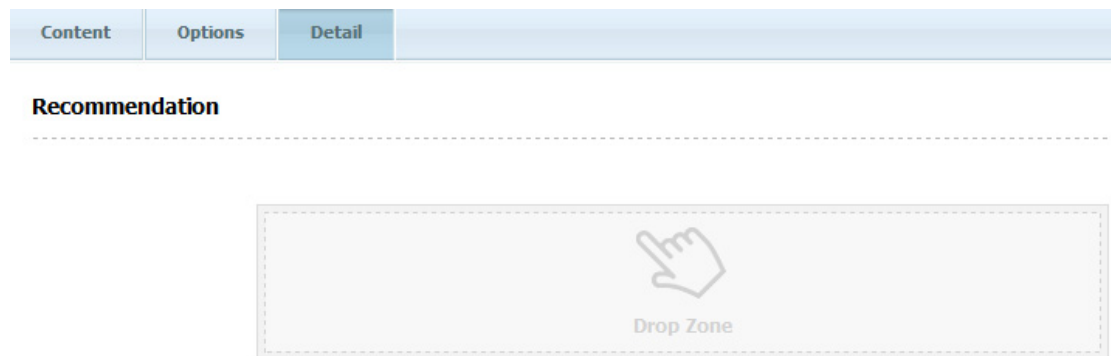
13. In the drop zone, add the assets (which you bookmarked in step 2 in Section 19.4.3, "Creating Static List Recommendations in Recommendation Mode") that you want to include in this segment's list. Do the following:

    a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane).

    b. In the list of bookmarked assets (displayed under the Bookmarks node) click the name of the desired asset and then drag it to and drop it into the field.

14. (Optional) You can change the order in which the assets in the list are organized by selecting an asset in the list and dragging within the list to move the asset up or down the list.

15. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.4.3 Creating Static List Recommendations in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

Keep the following in mind:

- If you are going to use segments, make sure you know which assets belong in which segments.

- If the segments you need do not exist, you can create them (assuming you have the appropriate permissions). See Chapter 18, "Grouping Visitors into Segments with Engage" for information on creating and configuring segments.

- You should know in advance the confidence values (in segment, out of segment, and when no segments apply) you will assign to the assets you are adding to the list.

Before you can assign assets to a recommendation, you should add the source asset(s) to your bookmarks for easy retrieval during the creation of the recommendation.

To create a Static Lists recommendation in Recommendation mode

> **Note:** You can click the **Save** icon (located in the asset's toolbar) as
> you progress through the sections of the Recommendation form in this
> procedure to save the changes you have made up to and in that
> section.

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

2. Find the assets to be included in the recommendation and bookmark them (which adds them to the **Bookmarks** node in the **My Work** tree):

   a. In the **Search** field, enter the desired search criteria (if any) and click the magnifying glass button.

   b. If you want 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. Select the asset type to which you want to limit your search.

   c. In the search results list, select (Ctrl+click) the assets you wish to bookmark. In the Search tab's toolbar, click the **Bookmark** icon.

   For more information on searching for and bookmarking assets, see Chapter 6, "Finding and Organizing Assets."

3. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

   a. 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. For more information, see Chapter 16, "Workflow."

   b. If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the Mode switch in the asset's toolbar.

   The tab displays the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Name** section of the form is displayed first:

Figure 19–5   Recommendation Content Tab

> **Note:**   When creating or editing a Recommendation asset, you can switch between the sections of the form by clicking the name of the section you want to switch to.

- 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. For more information, see Chapter 16, "Workflow."

- If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

4. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

5. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.

6. In the **Subtype** drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).

7. In the **Template** drop-down list, select a template for the recommendation.

> **Note:** If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

8. In the **Mode** field, select **Recommendation** in the drop-down menu.

9. In the **Start Date** and **End Date** fields, select a date range in which the asset will display online. For more information on Start/End dates, see Section 7.3.1, "About Start and End Dates."

10. In the **Locale** field, select the location that the asset will display in online.

11. Select the **Options** tab.

   Set the options appropriate for the list's intended purpose.

Figure 19–6   Recommendation Options Tab

In the **Selection** section of the Recommendation form, choose the selection criterion for the recommendation. For more information, see the section Section 19.2.3, "Selection Criteria."

In the **Sort** section of the Recommendation form, do the following:

a. In the Attribute Type drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

   For more information, see the section Section 19.2.4, "Sort Criteria."

b. In the Attribute drop-down menu, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, _ **ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

12. On the **Detail** tab, do the following:

As the **Mode** selected on the Content tab was **Recommendation**, the Detail tab displays two drop zones for static lists:

Figure 19–7   Segment and Asset Drop Zones for Static Lists and Smart Lists
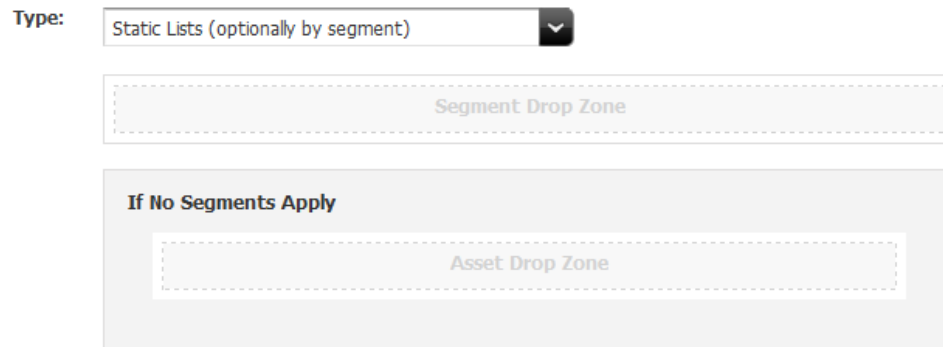
13. In the Drag Products Drop Zone, add the assets (which you bookmarked in step 2 in Section 19.4.3, "Creating Static List Recommendations in Recommendation Mode") that you want to include in this segment's list.

Complete the following:

a. In the **My Work** tree, expand the **Bookmarks** node. (If the **My Work** tree is collapsed, expand it by clicking the **My Work** bar in the navigation pane).

b. In the list of bookmarked assets (displayed under the **Bookmarks** node) click the name of the desired asset and then drag and drop it into the field.

14. Assign a confidence value for each asset, both **In Segment** and **Out of Segment**. Confidence is a weighting factor for the recommendation to use in determining which assets to return for the current visitor when that visitor is a member of the segment and when that visitor is not a member of the segment.

If the asset is not added to a segment, then only one **Confidence** field appears.

For additional information, see Section 19.2.2, "Confidence."

15. As you drag each segment into the Drop Zone, do the following:

Add as many segments as you want to include.

(Optional) Similarly, add assets to the **If No Segments Apply** category and assign confidence values as appropriate.

The completed form will look similar to the following:

Figure 19–8   Segments in a Recommendation

16. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.4.4 Creating Dynamic Lists Recommendations

> **Note:**   Before beginning this procedure, Consult your developers to find out which CSElement asset(s) should be used with the Dynamic Lists recommendation(s) you want to create.

To create a Dynamic Lists recommendation

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites Contributor interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

   a. 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. For more information, see Chapter 16, "Workflow."

b. If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the Mode switch in the asset's toolbar.

The tab displays the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Name** section of the form is displayed first:

Figure 19–9   Recommendation Content Tab

> **Note:**   When creating or editing a Recommendation asset, you can switch between the sections of the form by clicking the name of the section you want to switch to.

■   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. For more information, see Chapter 16, "Workflow."

- If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

3. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

4. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.

5. In the **Subtype** drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).

6. In the **Template** drop-down list, select a template for the recommendation.

> **Note:** If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

7. In the **Mode** field, select the **Recommendation** in the drop-down menu.

8. In the **Start Date** and **End Date** fields, select a date range in which the asset will display online. For more information on Start/End dates, see Section 7.3.1, "About Start and End Dates."

9. In the **Locale** field, select the location that the asset will display in online.

10. Select the **Options** tab.

   Set the options appropriate for the list's intended purpose.

Figure 19–10   Recommendation Options Tab

In the **Selection** section of the Recommendation form, choose the selection criterion for the recommendation. For more information, see the section Section 19.2.3, "Selection Criteria."

In the **Sort** section of the Recommendation form, do the following:

a. In the Attribute Type drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

For more information, see the section Section 19.2.4, "Sort Criteria."

b. In the Attribute drop-down menu, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, _ **ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

11. On the **Detail** tab, do the following:

Select **Dynamic Lists (generated by an element)** or **Dynamic Lists (optionally by segment)** from the **Type** menu. When selecting by element, a single Drop Zone displays (Figure 19–11). When selecting by segment, a segment Drop Zone and a Drop Zone for assets not contained in a segment displays (Figure 19–12).

Figure 19–11   Segment and Asset Drop Zones for Dynamic Lists
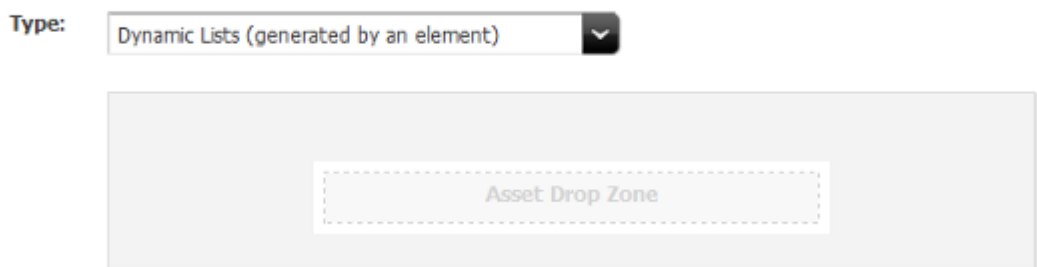
Figure 19–12   Segment and Asset Drop Zones for Dynamic Lists

12. If you are creating the dynamic list generated by an element, skip to the next step.

    If you are creating the dynamic list optionally by segment, drag the segment or segments into the Segment Drop Zone. Once each segment is added, it will have its own Asset Drop Zone.

13. Drag each desired asset into the Asset Drop Zone. If the type is a Dynamic List generated by an element, a CSElement is the only available asset type to drop in the drop zone. If the type is a Dynamic List optionally by segment, then either a CSElement or a Content Query asset are the only assets available to drop.

    The completed form will look similar to Figure 19–13.

Figure 19–13   Completed Drop Zone in Recommendation
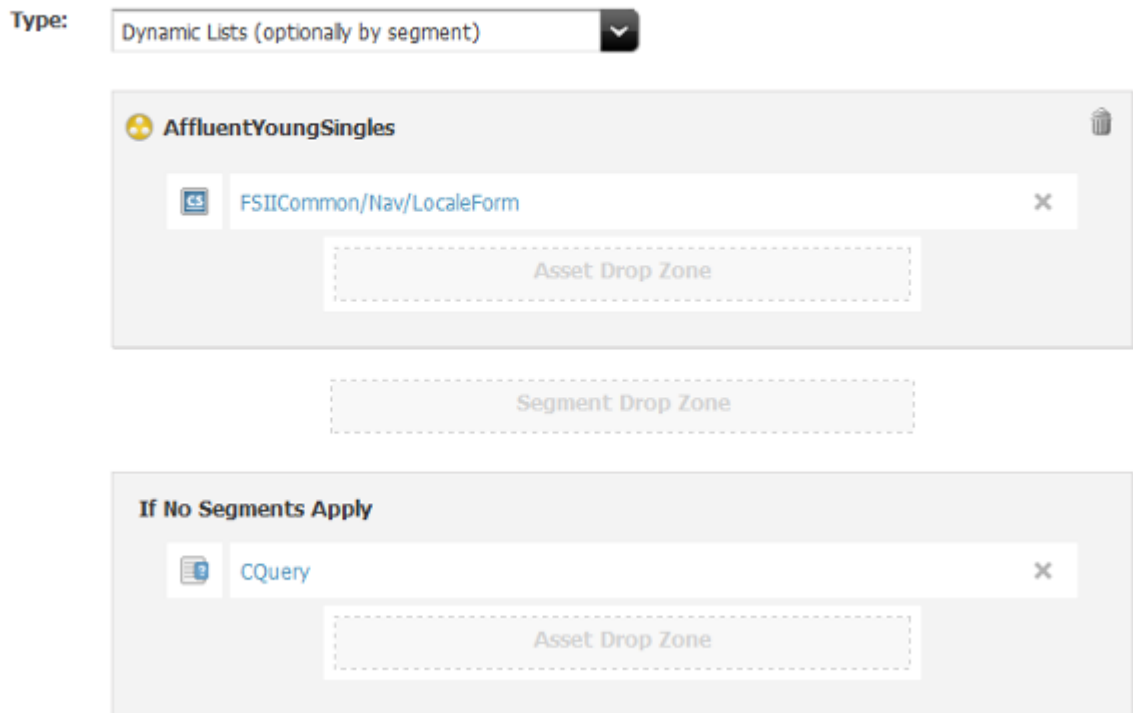
In this example, the segment named AffluentYoungSingles was dropped in the Segment Drop Zone, and a CSElement placed there. In the If No Segments Apply section, a Content Query was dropped.

14. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.4.5 Creating Related Items Recommendations

To create a Related Items recommendation

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

    a. 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. For more information, see Chapter 16, "Workflow."

    b. If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the Mode switch in the asset's toolbar.

The tab displays the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Name** section of the form is displayed first:

Figure 19–14   Recommendation Content Tab

- 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. For more information, see Chapter 16, "Workflow."

- If the Create view of the Recommendation asset is displayed in Web Mode, switch to Form Mode by clicking the **Mode** switch in the asset's toolbar.

3. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

4. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.

5. In the **Subtype** drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).

6. In the **Template** drop-down list, select a template for the recommendation.

   > **Note:** If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

7. In the **Mode** field, select the **List** in the drop-down menu.

8. In the **Start Date** and **End Date** fields, select a date range in which the asset will display online. For more information on Start/End dates, see Section 7.3.1, "About Start and End Dates."

9. In the **Locale** field, select the location that the asset will display in online.

10. Select the **Options** tab.

    Set the options appropriate for the list's intended purpose.

Figure 19–15   Recommendation Options Tab

In the **Selection** section of the Recommendation form, choose the selection criterion for the recommendation. For more information, see the section Section 19.2.3, "Selection Criteria."

In the **Sort** section of the Recommendation form, do the following:

a. In the Attribute Type drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

   For more information, see the section Section 19.2.4, "Sort Criteria."

b. In the Attribute drop-down menu, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, _**ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

11. On the **Detail** tab, do the following:

Select **Related Items (defined on asset forms)** from the **Type** menu.

This recommendation is used when you create and edit assets on the asset forms. Edit the asset forms

12. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

This recommendation now appears in the Related Items field (located in the **Metadata** section) of the Create and Edit views for flex assets and flex parent assets. You can now configure relationships for flex assets.

For more information, see Section 19.6.2, "Configuring Asset Relationships Using Related Items Recommendations."

19.5 Editing Recommendation Assets

To edit a Recommendation asset

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

2. Find and open the Recommendation asset you wish to edit:

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

b. If you want 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. 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 desired asset and select **Edit** from the context menu. You can also open the asset to view and then select **Edit** from the menu bar, or while viewing click the **Edit** icon.

For more information on searching, see the section Section 6.1, "Overview of Finding Assets."

When the asset is opened for editing, the asset appears in the same form as when it was created, with the same tabs and fields.

3. Make the desired edits. All fields on all tabs are available to modify.

4. Once the changes are made, Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.6 Configuring Assets to Be Recommended

The next step is to configure the segment ratings and asset relationships for the assets that you want to promote using recommendations. Specifically, you need to use the flex asset and flex parent asset forms in Sites interface to do the following:

- Rate how important the assets and parent assets are to the members of each segment.

- Configure the asset relationships that are represented by the Related Items recommendations.

> **Note:** Typically, business users configure assets to be recommended.

19.6.1 Assigning Ratings to an Asset

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

- It is much easier to manage the ratings for multiple assets if those assets reside in groups. In fact, it is often a good idea to 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.

- It is easier to compare the ratings for one group of assets to the ratings of another group than it is to compare the ratings of individual assets.

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

You should avoid using ratings to try to promote a specific flex asset in a specific circumstance. Instead, you should recommend specific assets, using either a Static Lists recommendation or a promotion to accomplish your goal.

Before you begin, be sure to complete the following tasks:

- Examine the segments to understand how they are defined and then determine which flex parents are significant for which segments.

- Ask your site developers whether they changed the system default rating for unrated assets. If they did not override the system default rating, that default rating is 50. This rating represents the average or middle point in your rating scale. Make a note of this value and keep it in mind while you rate assets. For example, rating an asset at lower than the system default rating means that it is unlikely that it would ever be recommended to a site visitor.

To assign ratings to an asset

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

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 the desired search criteria (if any).

b. If you want 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. 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 desired asset and select **Edit** from the context menu.

For more information on searching, see the section Section 6.1, "Overview of Finding Assets."

3. In the asset's Edit view, select the Marketing tab and navigate to the **Ratings** section. This section of the form lists all the segments that have been created for this site. For example:

Figure 19–16   Segment Ratings for an Asset

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).

For more information about ratings, see Section 19.2.1, "Ratings."

5. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.6.2 Configuring Asset Relationships Using Related Items Recommendations

Before you begin, be sure to complete the following tasks:

■ Ask the developers to describe each of the Related Items recommendations so that you are familiar with the relationships the Related Items recommendations represent.

■ Find out whether the recommendation is programmed to display a combination of flex assets, for example, Product and Content assets, so that you can configure the relationships correctly.

To configure relationships between assets

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

2. Before you work with the flex parent asset which has Related Items relationship(s) that you want to configure, you should find and bookmark the assets that you will want to put in these relationships. Bookmarked assets will be available in the **Bookmarks** node in the **My Work** tree.

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

   b. If you want 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. Select the asset type to which you want to limit your search.

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

   d. In the search results list, select (Ctrl+click) the assets you wish to bookmark. In the Search tab's toolbar, click the **Bookmark** icon.

3. Find the flex parent that has the Related Items relationship(s) that you want to configure and open its Edit form:

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

   b. If you want 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. 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 desired asset and select **Edit** from the context menu.

   For more information on searching, see the section Section 6.1, "Overview of Finding Assets."

4. In the parent asset's Edit form, scroll to the **Related Items** section, which will look similar to the image below:

Figure 19–17   Ratings and Related Items of an Asset

> **Note:** The Related Items section will only be available if you have created a Related Items type of Recommendation that specifies the asset type of the asset you want to add. See Section 19.4.5, "Creating Related Items Recommendations" for more information.

5. In the tree, open the **Bookmarks** node on the **My Work** tree. Drag and drop the flex asset or flex parent into the appropriate recommendation's Drop Zone.

Engage lists the assets under the recommendation.

Figure 19–18   Assets Listed as Related Items

6. In the **Confidence** column next to an asset or parent asset, enter a confidence value that represents the weight of this relationship; confidence is expressed as a percentage ranging between 0 and 100. If you enter 0 or leave the field empty, the asset is excluded from this recommendation.

For more information on confidence, see Section 19.2.2, "Confidence."

7. Save the asset. This can be done either by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

19.7 Verifying Recommendation Assets

To verify that you configured your recommendation assets correctly, complete the following tasks as a complete exercise:

- Create some test segments (see Chapter 18, "Grouping Visitors into Segments with Engage" for information on creating segments).

- In the flex asset and flex parent asset forms (for example, Product and Product Parent), assign ratings for the segments.

- Browse your site as a visitor and register yourself so that you qualify for the test segment.

- Examine the items that the recommendation assets return.

- If you find problems, ask your developers to write test pages that isolate the problem.

19.8 Publishing Rated Flex Assets

Since asset ratings and relationships take effect only after they are published, you must approve the assets whose ratings and relationships you configured so they can be published to your delivery system.

For more information about approving and publishing assets, see Chapter 14, "Approval for Publishing."

20

Creating Promotions with Engage

Promotions are assets that offer some type of value or discount to your site visitors based on the products the visitors are buying and the segments they qualify for.

This chapter describes how promotions work and how to create them. It contains the following sections:

- Section 20.1, "About Promotions"
- Section 20.2, "Creating Promotions"
- Section 20.3, "Sample Promotion Asset"
- Section 20.4, "Publishing Promotions"

20.1 About Promotions

Promotions offer some type of value to your site visitors and customers based on the segments the visitors belong to and products that they buy or view. This value can be offered in several ways:

- A discount off the purchase price of the promoted products.
- A discount off the entire value of the shopping cart.
- A discount off shipping charges.
- A combination discount: a shipping discount with a price or cart discount.

You (the marketers) define your promotions by using the following criteria:

- The segment members who qualify for the promotion. Promotions can be offered to everyone or to visitors in selected segments.
- The products to promote.
- The value the customers receive when they purchase the promoted product.
- The duration of the promotion.
- The text or graphics (or both) that appear on the rendered site page that notifies visitors of the promotion.
- The location of the notification. Promotions are displayed on the live (public) site pages by replacing the recommendation that would normally appear there.

20.1.1 About Promotions and Recommendations

Recommendation assets are the delivery mechanism for all promotional content. When you create a promotion asset, you determine where you want the promotion to be

displayed by selecting a Recommendation asset. The promotion replaces, or overrides, the recommendation and uses the template assigned to that recommendation to render the promotion in place of the recommendation that would normally be displayed.

Consequently, when Engage calculates the recommendation that a template asks for, it automatically checks whether there are any promotions that should override the recommendation. If so, it passes the promotion back to the recommendation's template and the template displays the promotion instead.

20.1.2 When Promotions Overlap

More than one promotion can use the same recommendation. What happens, then, when a visitor qualifies for more than one promotion and those promotions are using the same recommendation? It is easiest to explain with an example:

Example: Overlapping Promotions

There are two promotions running and both override the same recommendation:

Table 20–1 End Of Summer Sale Promotion

Name:	End-of-Summer Sale
Discount:	10% off the entire contents of the visitor's shopping cart
Segments it applies to:	All segments

Table 20–2 Printer Sale Promotion

Name:	Printer Sale
Discount:	30% off all printers
Segments it applies to:	1) Home Office Worker
	2) Back to School

> **Note:** Promotions do not have segment ratings. Either the promotion applies to the segment or it doesn't.

Question: How does Engage decide which promotion to display if the visitor is from either the Home Office Worker segment or the Back to School segment? And which discount is applied?

Answer: Engage randomly selects which promotion to display (each has a 50/50 chance) but it applies both discounts. However, applying both discounts does not mean that printers are discounted twice.

Examine the contents of this shopping cart:

Table 20–3 Shopping Cart Contents

Item in Cart
box of paper
printer
toner cartridge

Before Engage applies the discounts, it lists and compares the promotions for all the items in the cart:

Table 20–4   Applied Discounts for Promotions

Item in Cart	Summer Sale	Printer Sale
box of paper	10%	
printer	10%	30%
toner cartridge	10%	

Engage then applies the largest discount to each item. Therefore, on the final bill, the box of paper and the toner cartridge are 10% off and the printer is 30% off (not 40%).

Question: Only one of the promotions was displayed: how do the shoppers understand the total on the invoices?

Answer: If you (the marketers) created the promotions correctly, you entered a meaningful description of the discount in the Engage discount forms. Those descriptions are printed on the invoice next to the discounted items.

20.2 Creating Promotions

To create a promotion

Before you create your promotions, be sure that you complete the following tasks:

- Ask your site developers for a list of all the recommendations in your system and a description of where each one is programmed to appear.

- If you are creating promotions that apply to specific segments, you and the other marketers must create the segments.

This section contains the following topics:

-

-

-

-

-

-

20.2.1 Name and Define the Promotion

> **Note:**   You can click **Save** as you progress through the sections of the Promotion form in this procedure to save the changes you have made up to and in that section.

1. Log in to WebCenter Sites, select the site you want to work with (FirstSite II in this example) and the icon for the WebCenter Sites **Contributor** interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Promotion**.

> **Note:** If **New Promotion** is not on the list, stop here. You do not have the permissions to create promotions. If you have questions about your permissions, contact your administrator.

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. For more information, see Chapter 16, "Workflow."

A tab opens displaying the Promotion asset's Create view. Notice the names of the form's sections near the top. The **Name** section of the form is displayed:

Figure 20–1 Creating a Promotion Asset

> **Note:** When creating or editing a Promotion asset, you can switch between the sections of the form by clicking the name of the section you want to switch to.

3. In the **Name** section, do the following:

   a. Click in the **Name** field and enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

b. Click in the **Description** field and enter a brief description of the promotion. You can enter up to 128 alphanumeric characters.

c. In the **Start Date** and **End Date** fields, select a date range for the asset to display in Site Preview. For more information on Start/End dates, see Section 7.3.1, "About Start and End Dates."

d. Click **Continue**.

The tab displays the **Goals** section of the Promotion form, as shown in the next step.

Even though you can skip to any section of the Promotion form, be sure that you create your first promotions in the sequence that takes place when you use the **Continue** button. Remember that the information you enter on any form is not saved to the database until you save.

20.2.2 Define the Goals for the Promotion

Figure 20–2   Promotion Goals

A statement of goals is useful if your work is to be reviewed by others. Additionally, you might want to document why you designed the promotion a certain way after the promotion is complete.

In the **Goals** section of the Promotion form, do the following:

1. Click in the first **Goal** field and describe a goal.

2. Enter goals in the second and third **Goal** fields, as needed.

3. Click **Continue**.

The tab displays the Segments section of the Promotions form, as shown in the next step.

20.2.3 Define Which Visitors Are Eligible for the Promotion

Use the **Segments** section of the Promotion form to select the visitors who are eligible for the promotion. If you do not make any selections on this form, all visitors to the site are eligible for the promotion.

Figure 20–3   Promotion Segments

1. To offer the promotion to all visitors to the site, select **Apply to all visitors**.

   To restrict the promotion to visitors from certain segments, select **Apply to selected segments** and select the segments to whom you want to offer the promotion.

2. (Optional) If you need to create a new segment for the promotion, complete the following steps:

   a. Create a new segment. For help with this step, see Section 18.3, "Creating Segments."

   b. Click the **Refresh** icon in the tab displaying the promotion you are creating.

   c. Repeat the first step in this procedure to include this segment in the promotion.

3. Click **Continue**.

   The tab displays the Discount section of the Promotion form, as shown in the next step.

20.2.4 Define the Discount

Figure 20–4   Promotion Discount Definition

> **Note:**   To configure the discount to be based on the current state of a visitor's shopping cart, create a segment based on the shopping cart. Then, select that segment for the promotion. For information about creating segments based on the shopping cart, see Section 18.3.4, "Step 4: Define the Segment with Shopping Cart Criteria."

To define the discount, use the following options:

- Section 20.2.4.1, "Discounting the Entire Shopping Cart"
- Section 20.2.4.2, "Discounting Specific Products"
- Section 20.2.4.3, "Discounting the Shipping Costs"

You can combine either of the first two options with the third option, but you cannot combine the first two options.

20.2.4.1 Discounting the Entire Shopping Cart

In the Discount section of the Promotion form, do the following:

1. Select the second option under **Purchases** and then set the values that define the discount.

   For example, to offer $5.00 off, set the values as follows:

Figure 20–5 Purchase Discount as a Fixed Value

Purchases:

  ○ No Discount

  ● 5   ✕   :   dollars   ✕ ⌄ off the promoted products

   To offer 10% off, set the values as follows:

Figure 20–6 Purchase Discount as a Percentage

Purchases:

  ○ No Discount

  ● 10   ✕   :   percent   ✕ ⌄ off the promoted products

2. Select **Every product in the catalog**.

3. Click in the **Describe purchase discount** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated.

4. Either click **Continue** or go to Section 20.2.4.3, "Discounting the Shipping Costs."

20.2.4.2 Discounting Specific Products

In the Discount section of the Promotion form, do the following:

1. Select the second option under **Purchases** and then set the values that define the discount.

   For example, to offer $5.00 off, set the values as follows:

Figure 20–7 Purchase Discount as a Fixed Value

Purchases:

  ○ No Discount

  ● 5   ✕   :   dollars   ✕ ⌄ off the promoted products

   To offer 10% off, set the values as follows:

2. Select the products that the discount applies to:

Figure 20–8 Purchase Discount as a Percentage

a. Select **Specific item(s) from the tree or docked search**.

b. Select the products or product categories from the **Content Tree**, **My Work** tree, or docked search results list, and drag and drop the selected items into the Drag Products Drop Zone.

3. Click in the text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated.

4. Either click **Continue** or go to the procedure Section 20.2.4.3, "Discounting the Shipping Costs."

20.2.4.3 Discounting the Shipping Costs

You can discount shipping in addition to, or instead of, discounting purchases. In the **Discount** section of the Promotion form, do the following:

1. Under **Shipping Fees**, set the values that define the discount.

   For example, to offer 15% off shipping set the values as follows:

Figure 20–9 Promotion Shipping Fees

2. Click in the **Describe shipping fee discount for display on invoices or receipts** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated. For example:

Figure 20–10 Promotion Shipping Description

3. Either click **Continue** or go to the procedure Section 20.2.4.3, "Discounting the Shipping Costs."

20.2.4.4 Specifying a Store

You can specify the discount to apply to a certain store, if you have multiple stores. In the Store ID section, select the store.

1. Under Store ID, set the values that define the store discount.

Figure 20–11   Promotion Store ID

2. Click **Continue**.

   The tab displays the Duration section of the Promotion form, as shown in the next step.

20.2.5 Define the Promotion's Duration

Figure 20–12   Promotion Duration

> **Note:**   If you do not specify how long the promotion should run, the promotion runs until you delete it.

In the **Duration** section of the Promotion form, do the following:

1. Under **Duration**, set a start date and start time.

2. Specify when the promotion will end. Do one of the following:

   If you want the promotion to run until you delete it or change its duration, select **Apply until deleted**. Use this option if you are designing an ongoing promotion with an indefinite duration. When you want to cancel it, you can either delete it or you can edit it and apply an end duration date.

   If you want the promotion to run for a certain period of time after the start time that you specified in step 1, click **Apply for**. Enter a whole number (not a fraction or decimal) in the text box and choose hours, days, weeks, months, or years from the drop-down field.

If you want the promotion to run until a specific date, select **Apply until** and enter the date and time that you want it to end. The current date and time are displayed by default.

3. Click **Continue**.

    The **Display** section of the Promotion form displays, as shown in the next step.

20.2.6 Advertise the Promotion on Your Site

Figure 20–13 Configuring Promotion as it Displays on SIte

Promotion: Winter promotion

▸Name   ▸Goals   ▸Segments   ▸Discount   ▸Duration   **Display**

Site Display

Drag the asset from the tree or docked search in to the drop zone. This option allows you to specify a promotion which will override a recommendation. The asset type for the promotion must be a subset of the asset type specified for the recommendation.:

Drop Zone
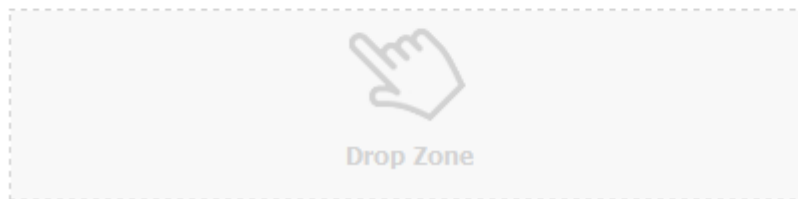
In the **Display** section of the Promotion form, do the following:

1. Find the assets to be included in the recommendation and optionally bookmark them (which adds them to the **Bookmarks** node in the **My Work** tree):

    a. In the **Search** field, enter the desired search criteria (if any) and click the **magnifying glass** button.

    b. If you want 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. Select the asset type to which you want to limit your search.

    c. In the search results list, either drag and drop the results to the drop zone, or select (**Ctrl**+**click**) the assets you wish to bookmark.

    For more information on searching for and bookmarking assets, see Chapter 6, "Finding and Organizing Assets."

2. If you selected to bookmark assets from the search results, drag and drop the asset that you want to use to advertise this promotion from the **Bookmarks** node into the Drop Zone. (Typically a promotional banner is stored as either an article or an image.)

    If you chose to drag from the search results, the items are already placed.

> **Note:** If you select multiple assets, when the promotion is displayed on your site pages, Engage displays the content that was rated the highest for the segments that the visitor belongs to. In other words, if you are using this promotion for more than one segment, you can use segment-specific ad banners for the promotion.

Once placed in the Drop Zone, the items appear on a list in the form with a drop-down list box of recommendations next to each name. For example:

Figure 20–14   Promotion Recommendations

3. In the **Pick recommendation** field next to the first item, select the name of the recommendation that you want to replace or override with this item. (The recommendation provides the location for the text you selected in step 2.)

4. Repeat step 3 for each item that you selected in step 2.

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**.

20.3 Sample Promotion Asset

When you work with the FirstSite II sample site, you get a sample promotion asset, **SummerSale**. This promotion is designed to work in concert with the sample Segment and Recommendation assets (also available from the FirstSite II sample site). Use the sample promotion as a template for creating promotion assets for your site.

20.4 Publishing Promotions

After you create a promotion, it must be approved before it can be published to your delivery system. The promotion takes effect only after it is published. Be sure to examine or inspect your promotion to verify that you configured it correctly before you approve it for publishing.

For more information about approving assets, see Chapter 14, "Approval for Publishing."

21

Navigational Reference

This chapter provides a navigational reference briefly explaining the functions of the most commonly used components of the Contributor interface.

This quick reference provides information about the following:

- Section 21.1, "Menu Bar"
- Section 21.2, "Navigation Pane"
- Section 21.3, "Workspace: Home Tab"
- Section 21.4, "Workspace: Asset Tab"
- Section 21.5, "Search/Browse Tab"
- Section 21.6, "Split View: Asset Tab and Search Results List"
- Section 21.7, "Icons"

21.1 Menu Bar

Figure 21–1   Menu Bar
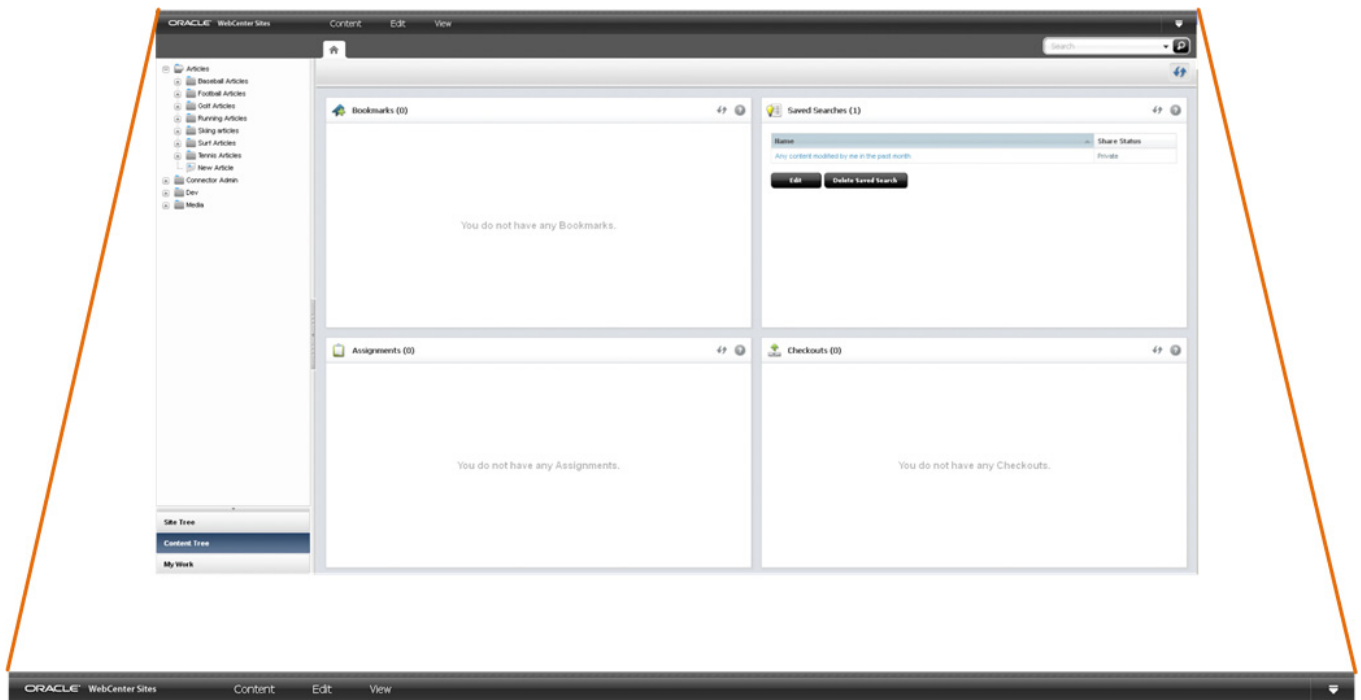
The menu bar contains the following options:

- **Content** – Opens a menu containing options to manage the assets you are currently working with. This includes: 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 Mode or Web Mode as well as 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 screen, 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 already open, in which case you will 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 to which you have permissions without having to log back in to WebCenter Sites.

        If you have permissions to access the WebCenter Sites Admin interface, the **Admin** application icon will be displayed to you in the applications bar. Clicking this icon opens the WebCenter Sites 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.

21.2 Navigation Pane

> **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

Figure 21–2   Navigation Pane
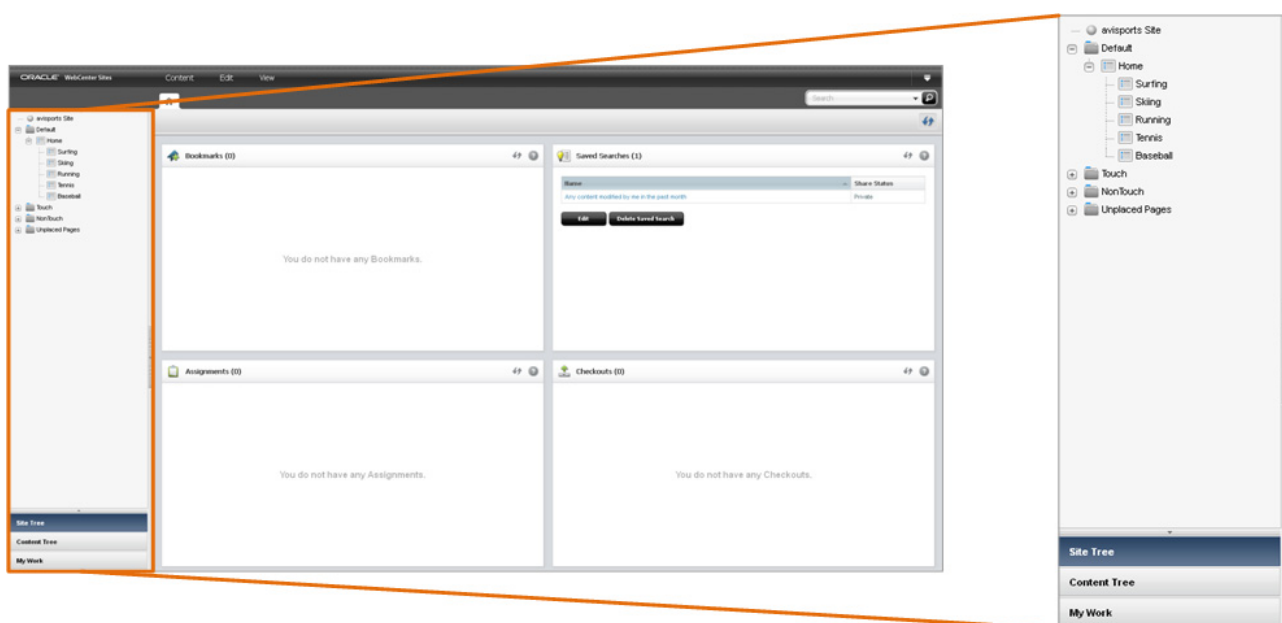
The navigation pane contains the following:

■ **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. For instructions on placing pages in a site plan and unplacing pages (removing pages from a site plan), see Section 10.2, "Placing and Unplacing Pages."

■ **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. For more information about flex relationship hierarchies, see Section 8.2, "Parent-Child Relationships."

■ **My Work** tree – Allows you to work with the **My Work** and **History** nodes. For more information, see Section 6.6, "Organizing Assets."

21.3 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, as shown in Figure 21–3.

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

Figure 21–3 Home Tab (Dashboard)
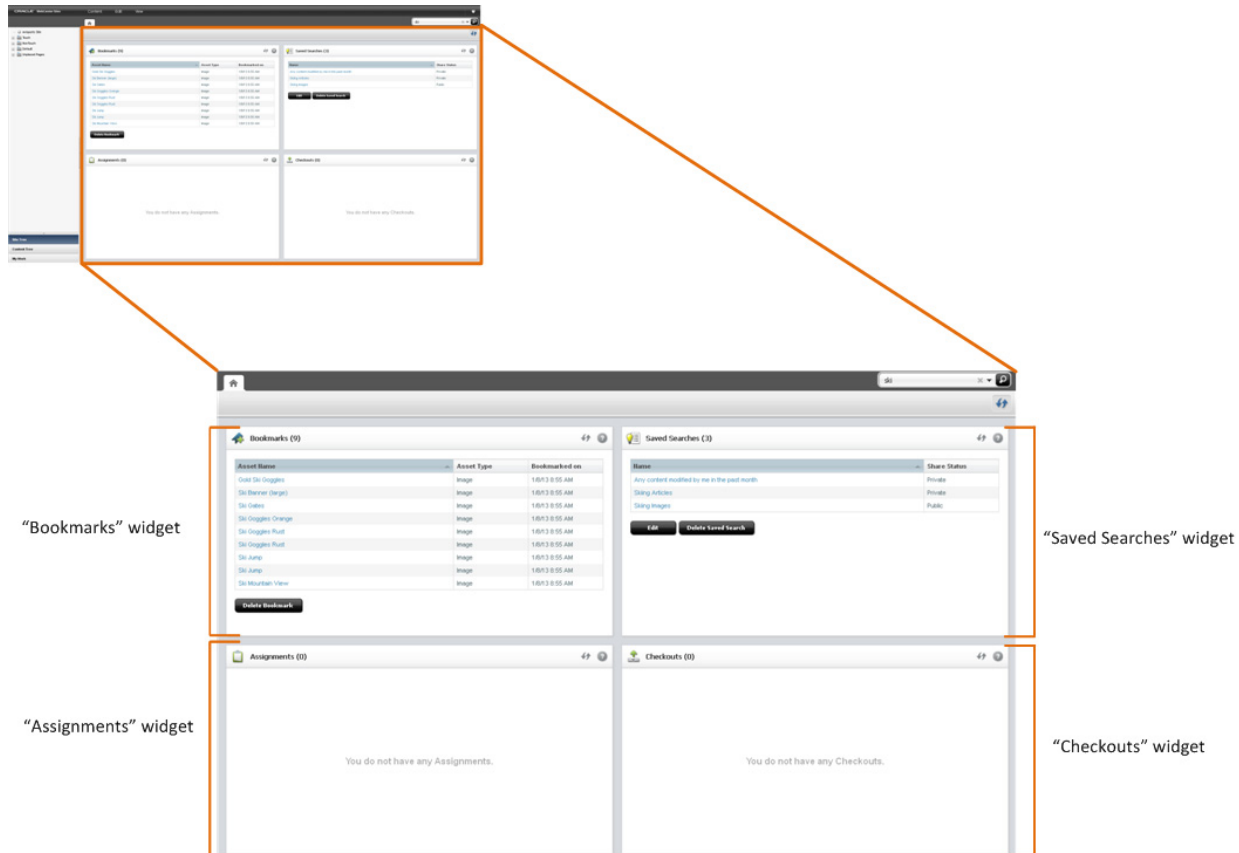
The dashboard will look different from user to user. This is because your dashboard only displays information pertaining to you. You can even reposition the widgets on your dashboard by dragging and dropping the widgets into the desired location on the dashboard. The following provides information about the widgets you will see on your dashboard:
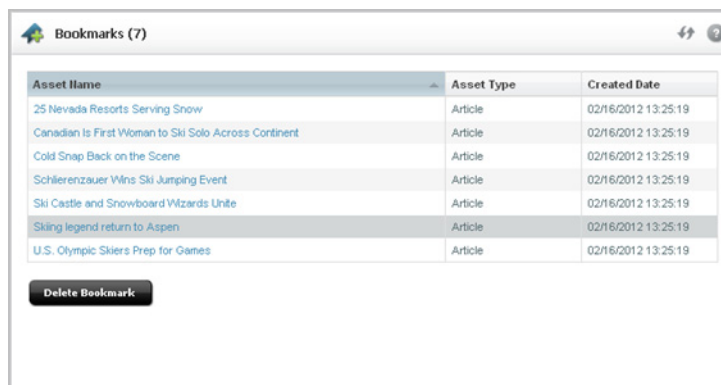
- **Bookmarks** – When you bookmark an asset for easy retrieval at a future time, the asset will be accessible from this widget. Bookmarked assets are also accessible from the **Bookmarks** node in the **My Work** tree.

- **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.

21.3.1 Bookmarks Widget

Bookmarking assets enables you to quickly access those assets at a future time. Bookmarked assets are listed under the **Bookmarks** node in the **My Work** tree and in the "Bookmarks" widget on your dashboard, as shown in Figure 21–4:

Figure 21–4   'Bookmarks' Widget

You can access a bookmarked asset by clicking the asset's name in the "Bookmarks" widget. You can also remove an asset from the list of bookmarked assets by selecting the desired asset's row and clicking **Delete Bookmark**. The asset is removed from the "Bookmarks" widget and from the **Bookmarks** node in the **My Work** tree.

For more information about bookmarking assets, see Section 6.6.1.1, "Bookmarking Assets."

21.3.2 Saved Searches Widget

You create a Saved Search by conducting a search and then saving the search criteria you used to render the results of that search. Once you have saved the desired search criteria as a Saved Search it is automatically made accessible in the "Saved Searches" widget (Figure 21–5). If another WebCenter Sites user saved their search criteria as a Saved Search and shared it to one or more of your assigned roles, you will also see that Saved search listed in your "Saved Searches" widget.

Figure 21–5   'Saved Searches' Widget
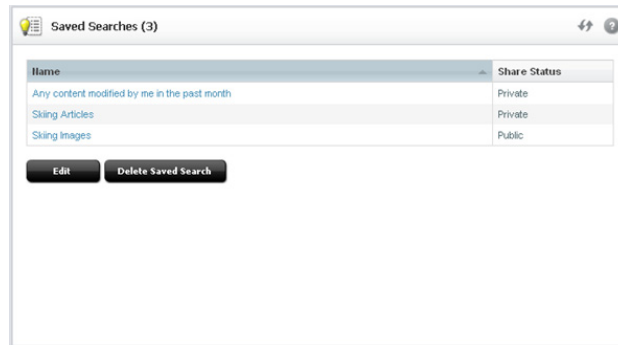
For more information about Saved Searches, see Section 6.5.1, "Saving Your Search Criteria as a Saved Search."

21.3.3 Assignments Widget
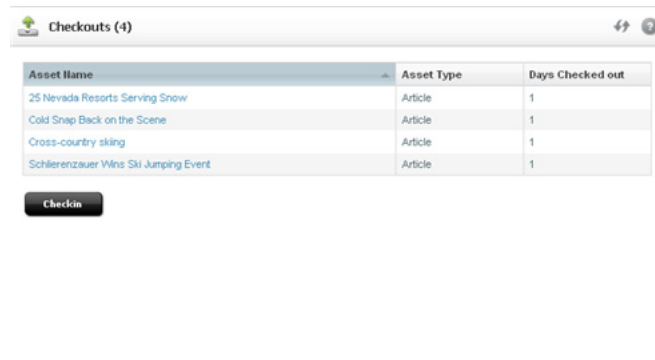
If workflow is enabled for an asset type on the site you are currently working with, the "Assignments" widget lists all of the assets currently assigned to you, as shown in Figure 21–6:

Figure 21–6   'Assignments' Widget
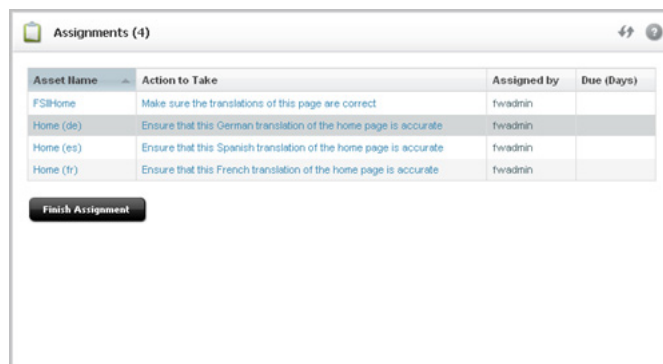
In the "Assignments" widget, you can work with an asset that has been assigned to you and finish an assignment in order to pass it through to the next step in the workflow process. For more information about workflow, see Chapter 16, "Workflow."

21.3.4 Checkouts Widget

If revision tracking is enabled for an asset type on the site you are currently working with, the "Checkouts" widget displays a list of assets that have been checked out by you, as shown in Figure 21–7:

Figure 21–7   'Checkouts' Widget

For more information about revision tracking, see Chapter 15, "Revision Tracking."

21.4 Workspace: Asset Tab

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

- Asset tab displaying the Inspect view of an asset in Form Mode:

Figure 21–8   Asset Displayed in Form Mode
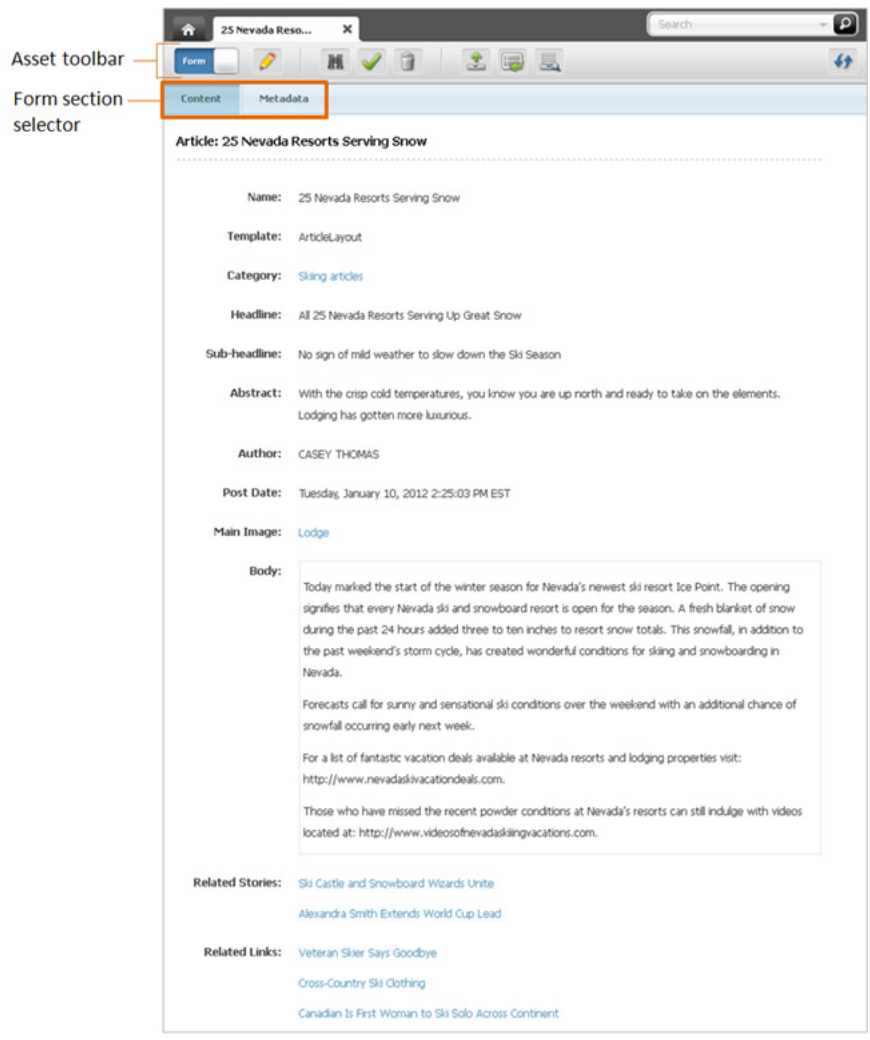
■   Asset tab displaying the Inspect view of an asset in Web Mode:

Figure 21–9   Asset Displayed in Web Mode
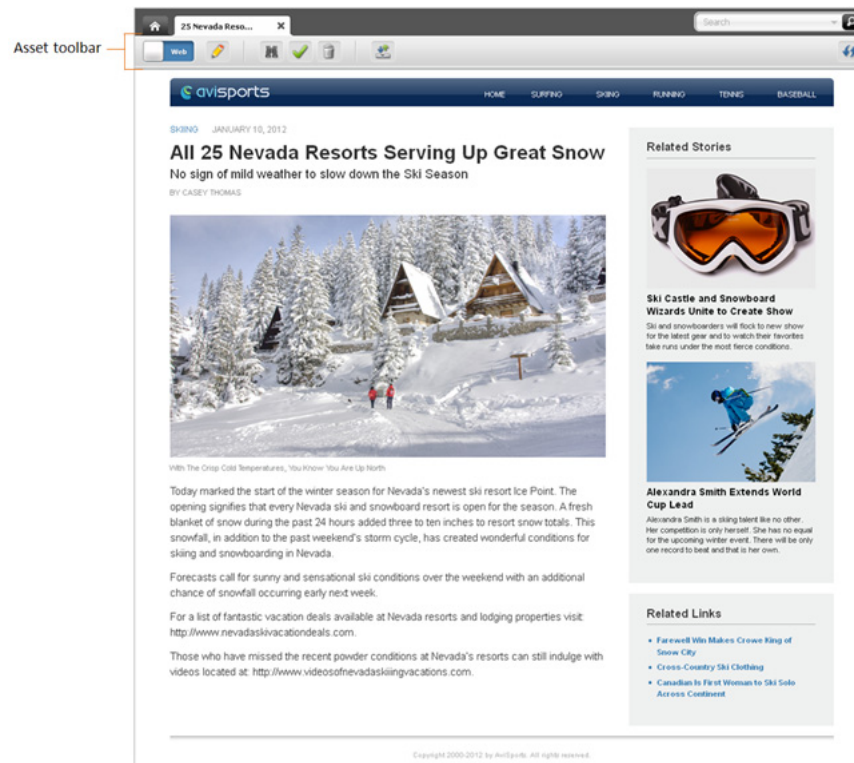
21.4.1 Asset Toolbar

The asset toolbar is available in both Form Mode and Web Mode and allows you to initiate the most commonly used content management functions, such as editing, saving, inspecting, and previewing an asset.

The asset toolbar is dynamic; that is, it displays different functions based on the following:

- The content management task you are performing at the time

- Whether you have the permissions necessary to perform a select task

- Whether content management functions, such as revision tracking, are enabled for the asset type and site with which you are currently working.

21.4.2 Form Section Selector

When you work with an asset in Form Mode, the tab displays the content entry form of that asset. An asset's form is divided into sections, accessible via the form section selector. Your administrator has the ability to customize asset forms (and their individual sections) on your site, as well as grant or deny you permissions to access specific form sections.

Table 21–1 lists the form sections available by default in a WebCenter Sites implementation.

Table 21–1   Form Sections

This section	Allows you to...
Content	View and edit the content stored in the asset.
	For more information, see Chapter 3, "Creating, Sharing, and Editing Assets in Form Mode" and Chapter 4, "Creating, Sharing, and Editing Assets in Web Mode."
Marketing	View and edit Engage options for the asset.
	For more information, see Chapter 17, "Oracle WebCenter Sites: Engage Overview," Chapter 18, "Grouping Visitors into Segments with Engage," Chapter 19, "Creating and Configuring Recommendations with Engage," and Chapter 20, "Creating Promotions with Engage."
Metadata	View the asset's metadata, such as creation date, modification date, asset ID, and any asset-specific attributes.
	Modify the asset's **Locale** setting (for more information, see Section 11.2, "Setting or Changing an Asset's Locale Designation").

21.5 Search/Browse Tab

The "Search" tab opens when you conduct a search or advanced search in the Contributor interface and displays a list of assets matching your search criteria, as shown in Figure 21–10:

Figure 21–10   'Search' Tab
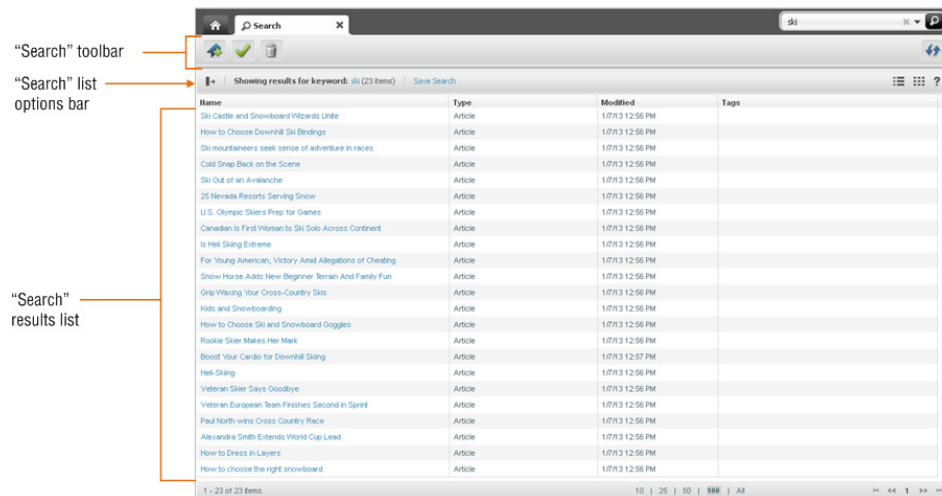
The "Search" tab consists of the following components:

- **Search toolbar** – Enables you to approve, bookmark, and delete assets listed in the "Search" tab, as well as to 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 will also 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.

For more information about conducting a search, see Chapter 6, "Finding and Organizing Assets."

The "Browse" tab (Figure 21–11) displays the list of assets returned by performing the following content management functions:

- Double-clicking the **Bookmarks** node in the **My Work** tree – the "Browse" tab opens displaying a list of bookmarked assets. For more information, see Section 6.6.1.2, "Accessing Bookmarked Assets."

- Double-clicking a parent asset in the **Content Tree** – the "Browse" tab opens displaying a list of children belonging to the parent. See Section 2.3.7, "Additional Ways of Accessing Assets."

Figure 21–11 'Browse' Tab
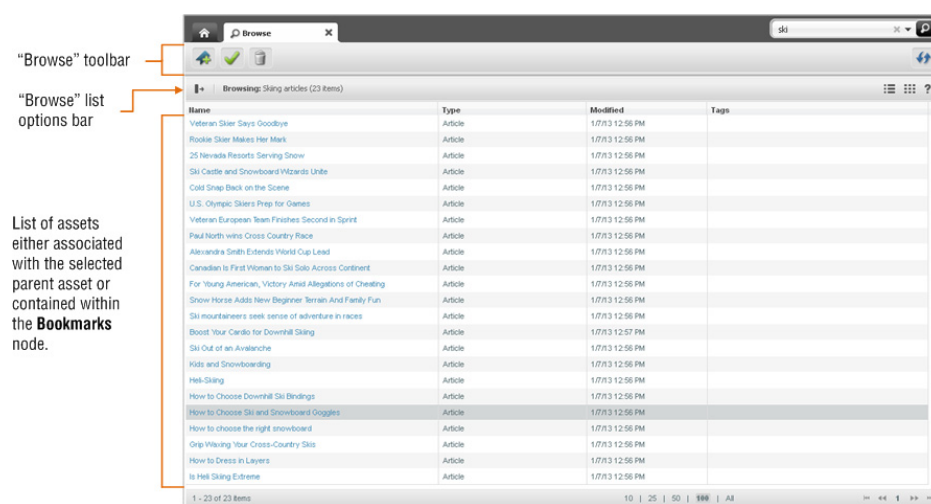
The "Browse" tab consists of the same components as the "Search" tab. The only difference is that you will not see the **Save Search** option in the **Browse list options bar**. Since this list of assets is returned by either double-clicking a parent asset in the **Content Tree** or double-clicking the **Bookmarks** node in the **My Work** tree, there is no search criteria to save as a Saved Search.

21.6 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 will be docked to the right of the tab displaying the asset (as shown below). This enables you to view the asset and the search results list simultaneously.

Figure 21–12 is an example view of the workspace with the search results list docked to the right of a tab displaying an asset's Inspect view in Form Mode:

Figure 21–12   Split View
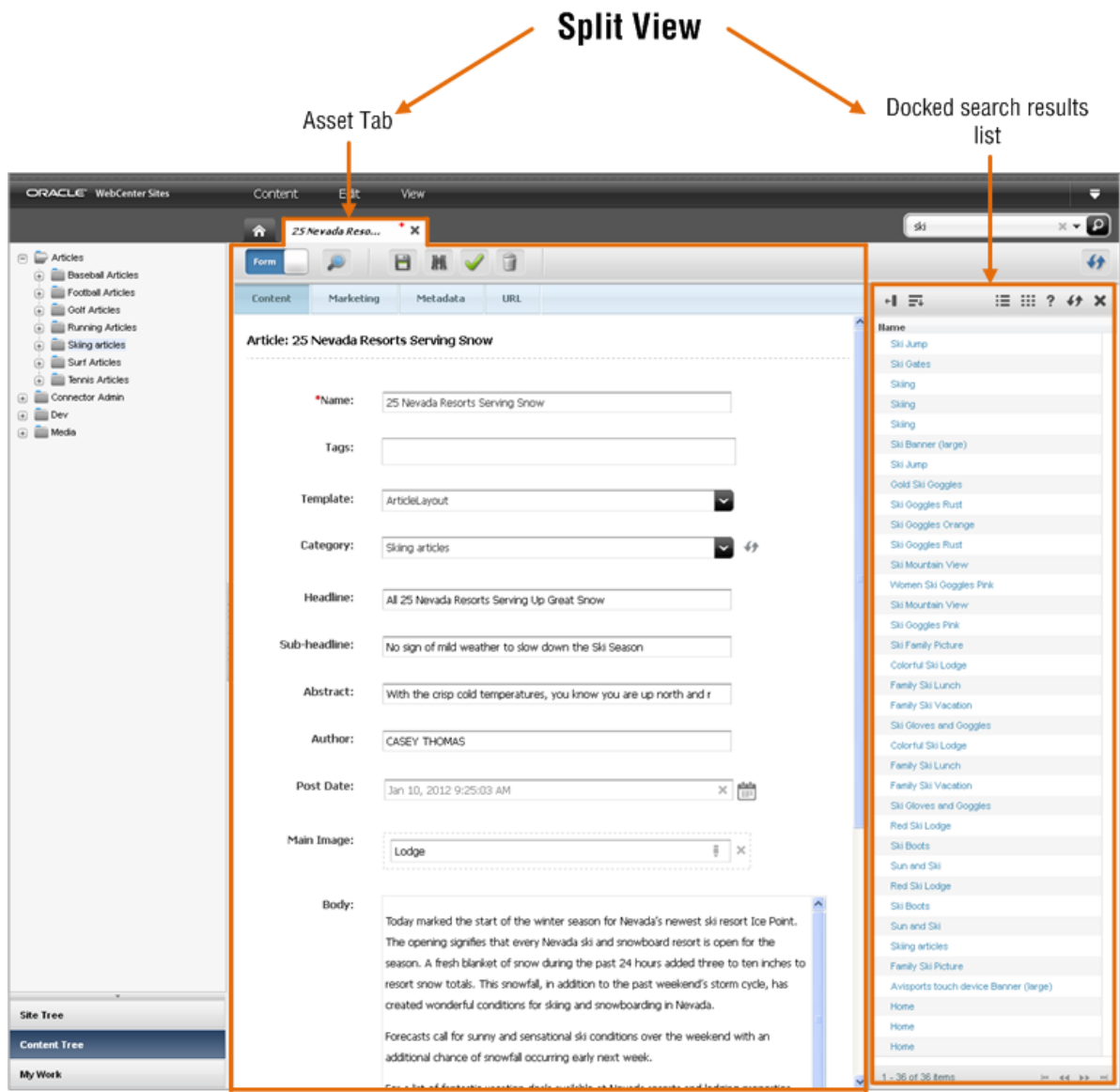
Tip: When a tab is open displaying an asset in its Edit view and you perform a search, the search results list is automatically docked to the right of the asset's tab.

Figure 21–13   Docked Search Results Toolbar

- If you want to see the search results in a "Search" tab, click **Undock** in the search results pane.

- If you want to close the search results list, click the **X** icon.

21.7 Icons

Table 21–2 shows icons you may see in your interface, depending on your permissions.

Table 21–2   Asset Toolbar Icons

This icon	Allows you to...
	Edit: Click to display the asset in its Edit view, where you can modify the asset. This icon is disabled (grayed out) if you do not have permission to edit an asset.
	Inspect: Click to display the asset in its Inspect view.
	Preview: Click to display the preview of the asset. This icon is disabled (grayed out) if you do not have permissions to preview the asset.
	Preview with Segment: Click to display the preview of the asset with a desired segment.
	Multi Device Preview: Click to display the preview of the asset as the asset will be displayed on one or more mobile devices. This icon is disabled (greyed out) if the Mobility component is not configured for your site.
	Save: Click to save the changes you have made to an asset so far, but keep the asset's "Edit" form open.
	Delete: Click to manually delete an asset. This icon is disabled if you do not have permissions to delete assets.
	Approve: Click to approve the asset for publishing. This icon is disabled (grayed out) if you do not have permissions to approve an asset.
	Change Template: Click to select another template for the asset you are working with. The template you choose will determine how the asset is rendered on the website. This icon is disabled (grayed out) if you do not have permissions to change the template of the asset.

Table 21–2   (Cont.) Asset Toolbar Icons

This icon	Allows you to...
	Check Out:
	If revision tracking is enabled for this type of asset, click this icon to check the asset out to you. Other users will not be able to make changes to this asset until you check the asset back in.
	This icon is disabled (not shown) if the asset is not being revision tracked.
	Check In:
	If revision tracking is enabled for this type of asset, and the asset is checked out to you, click this icon to check the asset back in. Now other users will be able to work with the asset.
	This icon is disabled (not shown) if the asset is not being revision tracked and/or the asset is not checked out to you.
	Undo CheckOut:
	If revision tracking is enabled for this type of asset, click this icon to undo the check out.
	This icon is disabled (not shown) if the asset is not being revision tracked.
	Rollback:
	If revision tracking is enabled for this type of asset, click this icon to go roll the asset back to a previous version.
	This icon is disabled (not shown) if the asset is not being revision tracked.
	Show Versions:
	If revision tracking is enabled for this type of asset, click this icon to display the asset's revision history report.
	This icon is disabled (not shown) if the asset is not being revision tracked.
	Checkin/Checkout:
	Displayed in an asset's toolbar when the asset is displayed in Web Mode. Click this icon to perform revision tracking functions on the primary asset (asset with which you are working) and all the assets displayed in the primary asset's web page view.
	This icon is always displayed, even if revision tracking is disabled.

22

The Flex Asset Model

As a content provider, you do not need to understand all of the details of the flex asset model. The purpose of this chapter is to help you develop a general understanding of this data model and how it relates to you as a content provider.

This chapter contains the following section:

- Section 22.1, "Overview of the Flex Asset Model"

22.1 Overview of the Flex Asset Model

As mentioned in Chapter 1, "Overview of WebCenter Sites," WebCenter Sites developers use two asset data models to create asset types and define how asset data is stored in the WebCenter Sites database: the basic asset model and the flex asset model.

The flex asset model is more complex than the basic asset model. Unlike basic assets, where the information for one instance of an asset is stored in one row of a database table, the information for one instance of a flex asset is stored in multiple database tables.

Whereas basic asset types are standalone asset types, flex asset types are composed of families of asset types. The members of a flex family are:

- flex attribute type (required)
- flex asset type (required)
- flex definition (required)
- flex parent (required)
- flex parent definition (required)
- flex filter type (optional)

The members of a flex family form an asset inheritance tree, where child assets inherit various attributes from their parents.

As a content provider, you will not directly work with all of the members of the flex family. In fact, you will mainly be working with flex assets, which are the key members of flex families (all of the other members of a flex family contribute to the flex asset in some way). If you have the appropriate permissions, you may also be responsible for creating new flex attributes, which are characteristics of flex assets.

Part II

Using the Community Application

This part describes Oracle WebCenter Sites: Community, a social computing application designed to gather visitors' comments, reviews, and ratings on website content. The Community application also enables its users to create and manage polls, which can be used to survey site visitors about desired topics. This part begins with an overview of the Community application and its users. It continues to the process of configuring and deploying widgets on web pages, and describes methods for moderating site visitors' comments, reviews, and ratings, as well as managing poll results.

> **Note:** This part is for advanced users who have experience working with tags and templates.

Part II contains the following chapters:

23

Welcome to the Oracle WebCenter Sites: Community Application

This chapter introduces the Oracle WebCenter Sites: Community application and the community widget tags that you can deploy on your websites to collect visitor feedback.

This chapter contains the following sections:

- Section 23.1, "Overview"
- Section 23.2, "Types of Community Widget Tags"
- Section 23.3, "Deployment Options"
- Section 23.4, "Community Interface"
- Section 23.5, "Community Application Roles and Permissions"

23.1 Overview

- *You have published new content to one of your company's websites and you wish to collect feedback from site visitors.*

- *You and your staff want to know which site content is most popular among visitors. Using community widgets, visitors are able to post comments, rate content, and write reviews, and you are able to better understand your visitors' preferences.*

- *Your website needs a moderator and a variety of options for managing visitors' comments, reviews, and ratings. With the Community application you can allow your site visitors to post comments, reviews, and ratings automatically to the website, or you can monitor visitors' input before displaying it on the website.*

- *You want to conduct visitor surveys on your website. The Community application enables you to create customized polls which can be used to gather feedback from your visitors to better understand their preferences on a given topic.*

- *You want to add corporate blogs to your website. If you install the Community Blogs module on a content management site, it provides the site with default components that enable you to add blog functionality to the website.*

Community is a social computing application that runs on the Web Experience Management (WEM) Framework. When the Community application is enabled on a content management (CM) site, it provides configurable community widget tags that can be deployed on any web pages to display Comments, Reviews, Ratings, Polls, and Login Bar widgets to visitors. Site visitors can form communities by utilizing these widgets to lead discussions, express opinions, participate in polls, and share experiences about specific topics on the sites. Moderators of the Community

application can collect input from such visitors in order to better understand visitors' preferences and adjust site content to their expectations.

All comments, reviews, and ratings posted to the website are displayed in the Community interface where they can be manually moderated and/or automatically moderated by the auto-moderation filters ("Restricted Words," "Visitor Blacklist," and/or "Visitor Whitelist"). Poll instances and their associated results are also displayed in the Community interface.

Figure 23–1 illustrates how a default widget tag's settings are reconfigured in the Community interface and deployed on a web page. Our example uses the Comments widget tag (for a complete list of the widget tags the Community application supports, see Table 23.2).

The Community application also supports blog functionality. Integrating the Oracle WebCenter Sites: Community Blogs module with the Community application enables your content providers to publish corporate blogs that display the Community application's comment fields and links. For more information about the Community Blogs module, see Chapter 32, "Creating Blog Content," the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*, and the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

Figure 23–1   Overview of Reconfiguring and Deploying Default Community Widgets

1. Default community widget tag settings are reconfigured by using the desired widget's "Permissions" and "Appearance" configuration screens. Once saved, the settings are also saved to the widget's "Tag" field in its deployment screen.
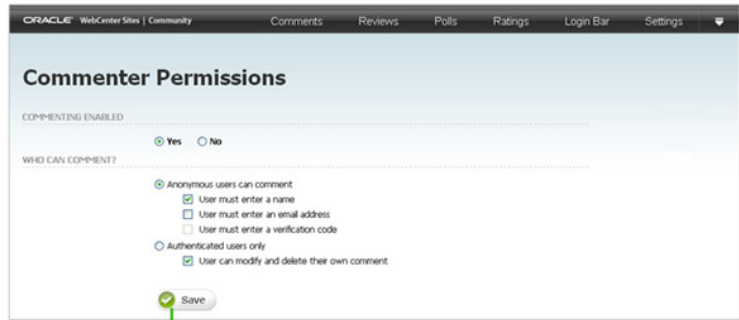
2. The widget defined in the "Tag" field is displayed on web pages once the tag is deployed on those pages.

Comments widget displayed on a web page.
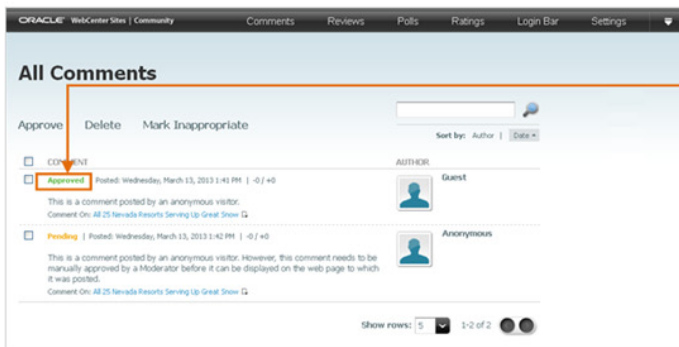
3. Comments posted to the website are also displayed in the Community interface's comments moderation screens. This example shows the comments displayed in the "All Comments" screen.

If moderation is enabled, then comments require approval in the Community interface. If moderation is disabled, then comments are automatically approved and displayed on the website.

Figure 23–2   A Closer Look at Widget Tags
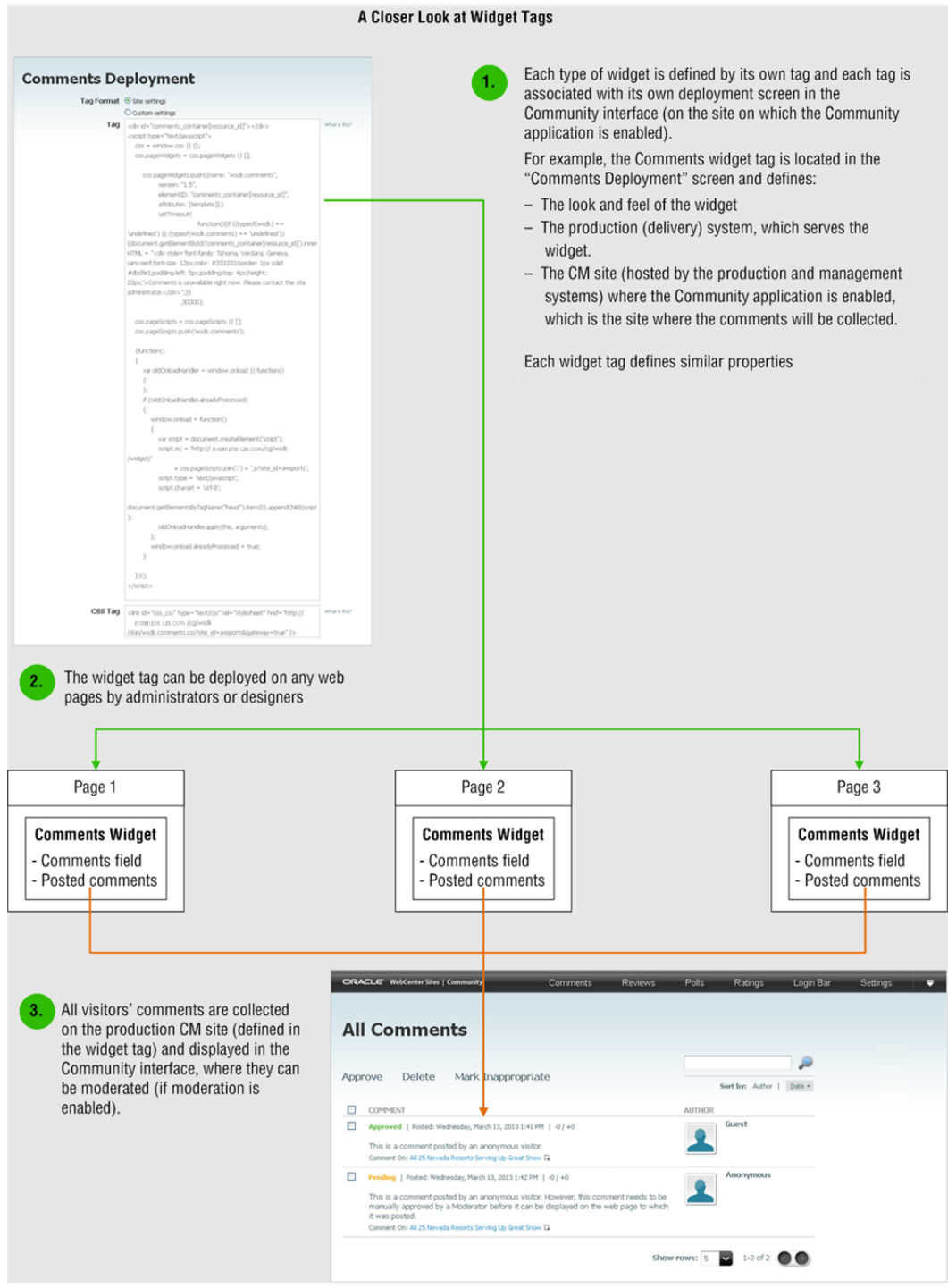
23.2 Types of Community Widget Tags

The following table lists the community widget tags administrators and designers can deploy on any web pages:

Table 23–1   Community Widget Tags

Widget Type	Widget Tag	For More Information, See ...
Comments	■ Comments ■ Comments Summary ■ Links to Topics ■ Recently Commented ■ Most Commented	Chapter 25, "Working with the Comments Widgets"
Reviews	■ Reviews ■ Reviews Summary ■ Links to Topics ■ Average Rating ■ Top Ranked Topics ■ Recently Reviewed ■ Most Reviewed	Chapter 26, "Working with the Reviews Widgets"
Ratings	■ Stars Ratings ■ Thumbs Up/Down Ratings ■ Like It Ratings ■ Recommend Ratings ■ Average Rating ■ Recently Rated ■ Most Rated	Chapter 27, "Working with Ratings Widgets"
Login Bar	Login Bar	Chapter 28, "Working with the Login Bar Widget"
Polls	■ Poll ■ Results	Chapter 29, "Working with Polls"

23.3 Deployment Options

Widget tags can be deployed with either default settings (stored on the CM site where the Community production applications are enabled), or custom settings. The tags deployed with default settings are dynamically updated when their default permissions and appearance settings are modified and saved in the Community interface. Because custom settings cannot be saved, configuring a tag with custom settings requires redeploying the tag on the desired web pages.

23.4 Community Interface

The Community application provides the Community interface. Figure 23–3 illustrates the functions associated with the Community interface and identifies the roles that have permissions to those interface functions.

Figure 23–3   Overview of the Community Interface

23.5 Community Application Roles and Permissions

The Community application uses the roles `Moderator` and `Designer` to regulate access to its interface functions, Figure 23–4 summarizes the permissions each role has to the Community application. For a detailed look at the permissions associated with each role, and the permissions site visitors can be assigned, see Table 23–2 and Table 23–3.

Figure 23–4 Community Application Roles and Permissions
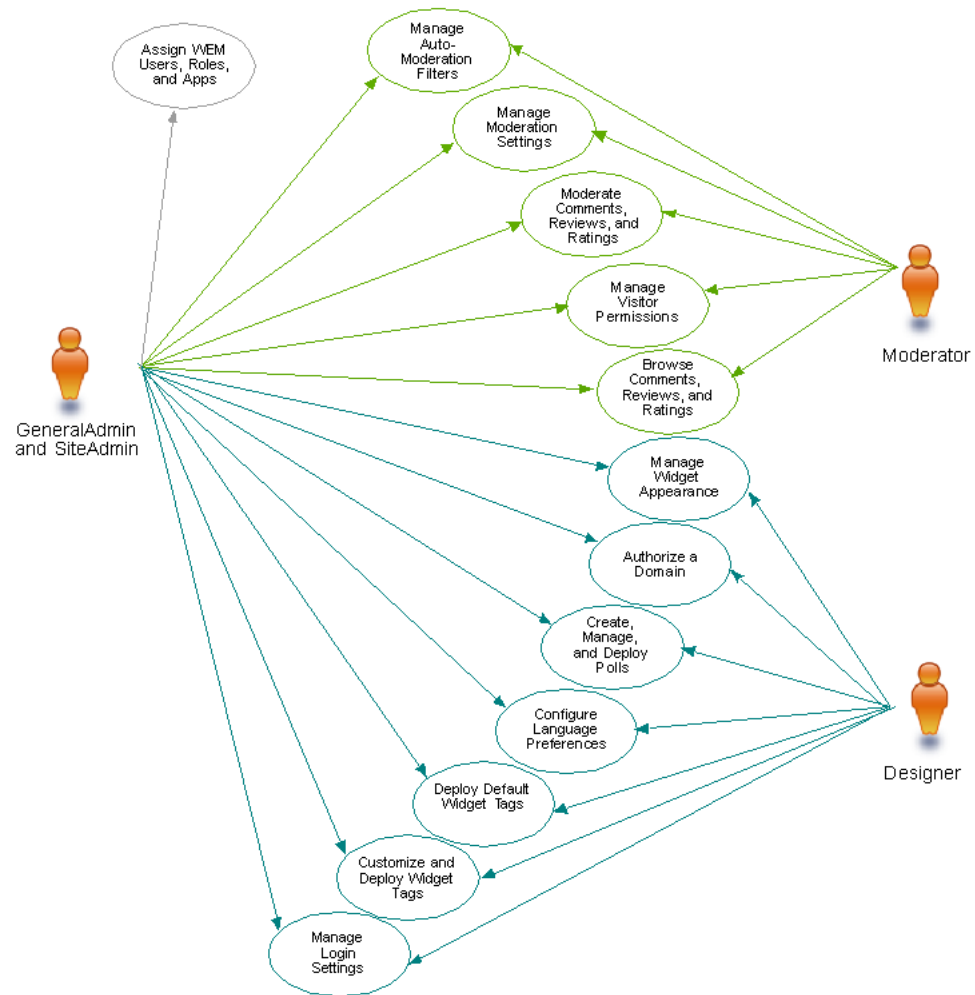
When the Community application is installed, the roles `Moderator` and `Designer` are automatically created if they do not already exist.

Moderator

Users assigned the `Moderator` role can set visitor permissions to community widgets, configure moderation settings for community widget tags, and enable (or disable) the auto-moderation filters that are used to assist in the moderation process for visitors' comments, reviews, and ratings. These users can also manually moderate comments, reviews, and ratings that are posted to the pages on which community widget tags are deployed.

Designer

Users assigned the `Designer` role can configure the default appearance of community widgets, create polls, and modify a given community widget tag with custom values. These users can also specify the domain on which community widget tags can be deployed, configure the language in which deployed community widgets will be displayed, and use the WebCenter Sites Admin interface to deploy community widget tags and publish the templates.

Table 23–2 provides an overview of the permissions users can be granted to Community interface functions.

Table 23–2   Community Application Roles and Permissions

Permissions	Moderator	Designer	For More Information, See...
Manage Commenter Permissions	Yes	No	Section 25.3.2, "Reconfiguring the Comments Wigets' Permissions Settings"
Manage Reviewer Permissions	Yes	No	Section 26.3.2, "Reconfiguring the Reviews Widgets' Permissions Settings"
Manage Rater Permissions	Yes	No	Section 27.3.2, "Reconfiguring the Ratings Widgets' Permissions Settings"
Manage Comments Widgets' Appearance	No	Yes	Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings"
Manage Reviews Widgets' Appearance	No	Yes	Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings"
Manage Ratings Widgets' Appearance	No	Yes	Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings"
Create, Manage, and Deploy Polls Widgets	No	Yes	Chapter 29, "Working with Polls"
Configure and Deploy the Login Bar Widget Tag	No	Yes	Chapter 28, "Working with the Login Bar Widget"
Authorize a Domain	No	Yes	Section 30.2.1, "Working with the Authorized Domain Screen"
Manage the Restricted Words Filter	Yes	No	Section 30.2.2, "Working with the Restricted Words Screen"
Manage the Visitor Blacklist Filter	Yes	No	Section 30.2.3, "Working with the Visitor Blacklist Screen"
Manage the Visitor Whitelist Filter	Yes	No	Section 30.2.4, "Working with the Visitor Whitelist Screen"
Manage Moderation Settings	Yes	No	Section 30.2.5, "Working with the Moderation Screen"
Configure a Language Preference for Deployed Community Widgets	No	Yes	Section 30.2.6, "Working with the Language Screen"
Deploy Default Comments Widget Tags	No	Yes	Section 25.4.1, "Deploying a Default Comments Widget Tag"
Deploy Default Reviews Widget Tags	No	Yes	Section 26.4.1, "Deploying a Default Reviews Widget Tag"
Deploy Default Ratings Widget Tags	No	Yes	Section 27.4.1, "Deploying a Default Ratings Widget Tag"
Customize and Deploy Comments Widget Tags	No	Yes	Section 25.4.2, "Deploying Custom Comments Widget Tags"
Customize and Deploy Reviews Widget Tags	No	Yes	Section 26.4.2, "Deploying Custom Reviews Widget Tags"
Customize and Deploy Ratings Widget Tags	No	Yes	Section 27.4.2, "Deploying Custom Ratings Widget Tags"
Enable SEO Support for Comments and Reviews	No	Yes	*Oracle Fusion Middleware WebCenter Sites Developer's Guide*
Deploy the CSS Tag	No	Yes	*Oracle Fusion Middleware WebCenter Sites Developer's Guide*

Table 23–2   (Cont.) Community Application Roles and Permissions

Permissions	Moderator	Designer	For More Information, See...
Moderate Comments	Yes	No	Section 25.2, "Moderating Comments"
Moderate Reviews	Yes	No	Section 26.2, "Moderating Reviews"
Moderate Ratings	Yes	No	Section 27.2, "Moderating Ratings"

Table 23–3, " Visitor Permissions to Community Widgets on the Website" provides an overview of the permissions site visitors can be granted on the website.

Table 23–3   Visitor Permissions to Community Widgets on the Website

Permissions	Authenticated User	Anonymous User	For More Information, See ...
Log in to the website	Yes	No	Section 31.2.1, "Logging in to the Site as an Authenticated Visitor"
Post Comments as an Authenticated Visitor	Yes	No	Section 31.2.2, "Posting Comments as an Authenticated Visitor"
Post Reviews as an Authenticated Visitor	Yes	No	Section 31.2.3, "Posting Reviews as an Authenticated Visitor"
Modify Approved Comments	Yes	No	Section 31.2.4.1, "Modifying Comments on the Website"
Delete Approved Comments	Yes	No	Section 31.2.4.2, "Deleting Comments from the Website"
Modify Approved Reviews	Yes	No	Section 31.2.5.1, "Modifying Reviews on the Website"
Delete Approved Reviews	Yes	No	Section 31.2.5.2, "Deleting Reviews from the Website"
Post Comments and Reviews as a Guest	Yes	Yes	Section 31.3, "Working with Comments and Reviews Widgets as an Anonymous Visitor"
Flag Inappropriate Comments and Reviews	Yes	Yes	Section 31.5, "Flagging Inappropriate Posts"
Reply to Approved Comments	Yes	Yes	Section 31.6, "Replying to Posted Comments"
View a topic's Review "Detail" Menu	Yes	Yes	Section 31.2.5.1, "Modifying Reviews on the Website"
Rank Individual Comments and Reviews	Yes	Yes	Section 31.8, "Ranking Visitor Comments and Reviews"
Share Comments and Reviews to your Facebook, Twitter, or Google+ News Feed	Yes	Yes	Section 31.9, "Sharing Comments and Reviews with Facebook, Twitter, and Google+"
Create a Permalink for a Comment or Review	Yes	Yes	Section 31.10, "Creating and Sharing a Permalink"
Submit a Rating for a Topic on the Website	Yes	Yes	Section 31.11, "Working with Ratings Widgets"
Submit a Vote for a Poll	Yes	Yes	Section 31.12, "Working with Poll Widgets"

24

Getting Started

This chapter provides instructions on logging in to the Community interface. The last section of this chapter provides a deployment scenario to help designers become familiar with the process of deploying community widget tags.

This chapter contains the following sections:

- Section 24.1, "Logging In"
- Section 24.2, "How Do I Deploy Community Widget Tags?"
- Section 24.3, "Next Steps"

24.1 Logging In

The Community application is associated with WebCenter Sites through the WEM Framework. By logging in to a site and accessing the Community application you allow the system to recognize your status as a moderator or designer and enable your permissions to Community interface functions.

To log in to the Community interface

1. Go to the following URL:

   ```
   <protcol>://<server>:<port>/<context>/login
   ```

   where `<protocol>` is the protocol of the WebCenter Sites application, `<server>` is the host name or IP address of the server running the WebCenter Sites application, `<port>` is the port number of the WebCenter Sites application, and `<context>` is the name of the WebCenter Sites application that was deployed on the server.

2. Access the Community application by logging in to WebCenter Sites. **Log in credentials are case-sensitive.**

   In this guide we are using the default login credentials of a general administrator:

   - **Username:** `fwadmin`
   - **Password:** `xceladmin`

Figure 24–1   WebCenter Sites Login Screen
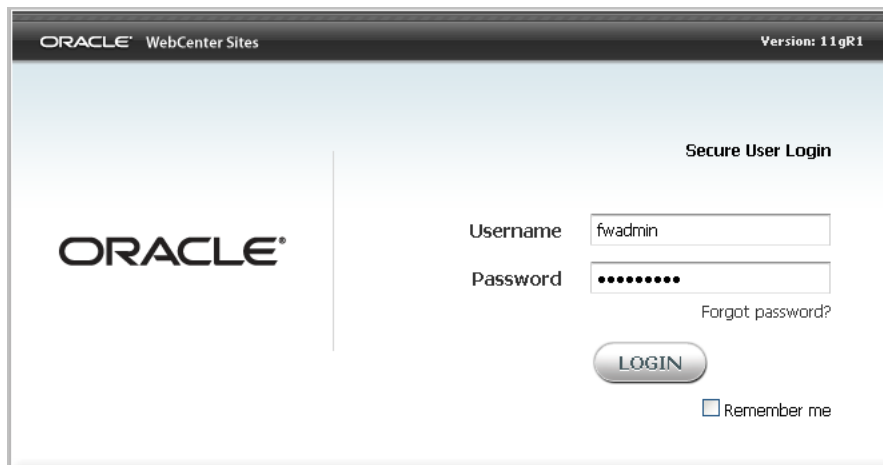
3. Click **Login**.

4. If you are logging in for the first time, the screen shown in Figure 24–2 is displayed; otherwise, you are logged in to the application you last visited:

Figure 24–2   WebCenter Sites Login Screen: Select Site

Select the site to which the Community application is assigned, and the **Community application** icon.

■   If you are a moderator, the first screen you see is the "All Comments" screen (shown in Figure 24–3 and Figure 24–4).

  –   If this is the first time the Community application is being used, there will be no comments listed in the "All Comments" screen, as shown in Figure 24–3.

Figure 24–3   Unpopulated Community Interface 'All Comments' Screen
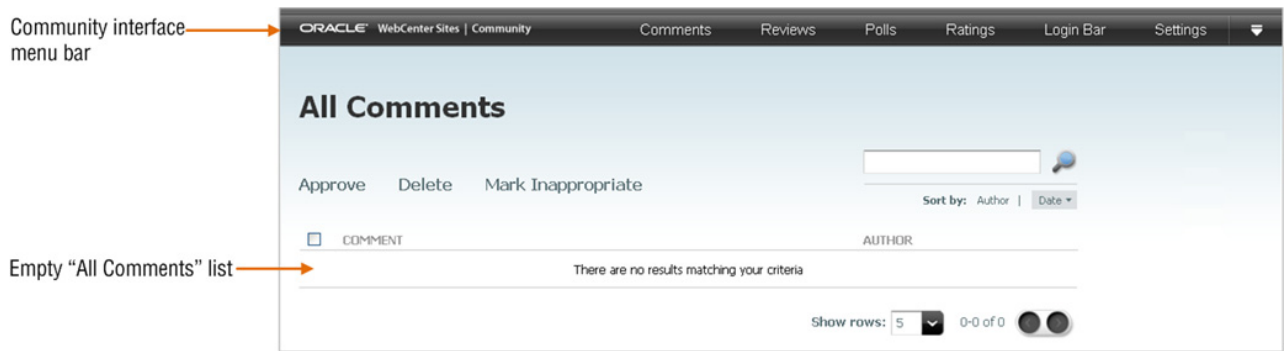
- If the Comments widget tag has already been configured and deployed on a web page, and site visitors have posted comments to that page, you will see those comments in the "All Comments" screen, as shown in Figure 24–4.

Figure 24–4   Populated Community Interface 'All Comments' Screen
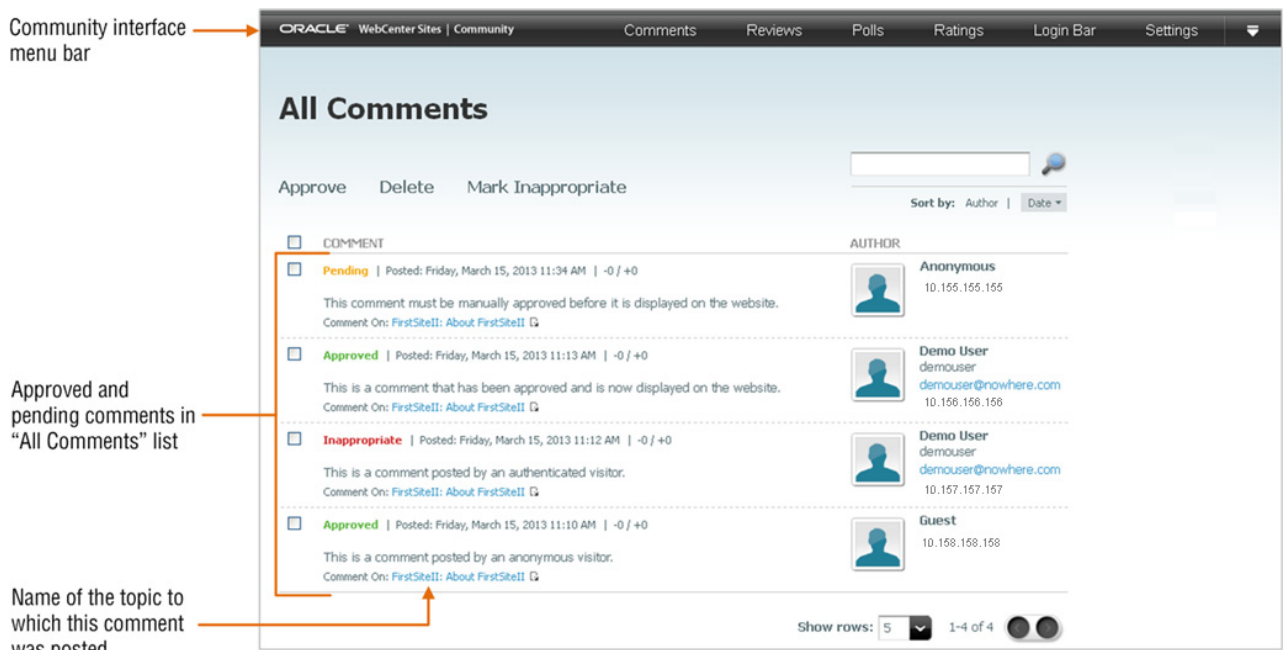
Moderators can also view visitors' comments, reviews, and ratings by either the topic to which they were posted or by the name of the site visitor who posted them.

- If you are a designer, the first screen you will see is the "All Polls" screen.

  - If this is the first time the Community application is being used, there will be no polls listed in the "All Polls" screen, as shown in Figure 24–5.

Figure 24–5 Unpoulated 'All Polls' Screen

      – If poll widgets have already been created, you will see those polls listed in the "All Polls" screen, as shown in Figure 24–6.

Figure 24–6 Populated 'All Polls' Screen
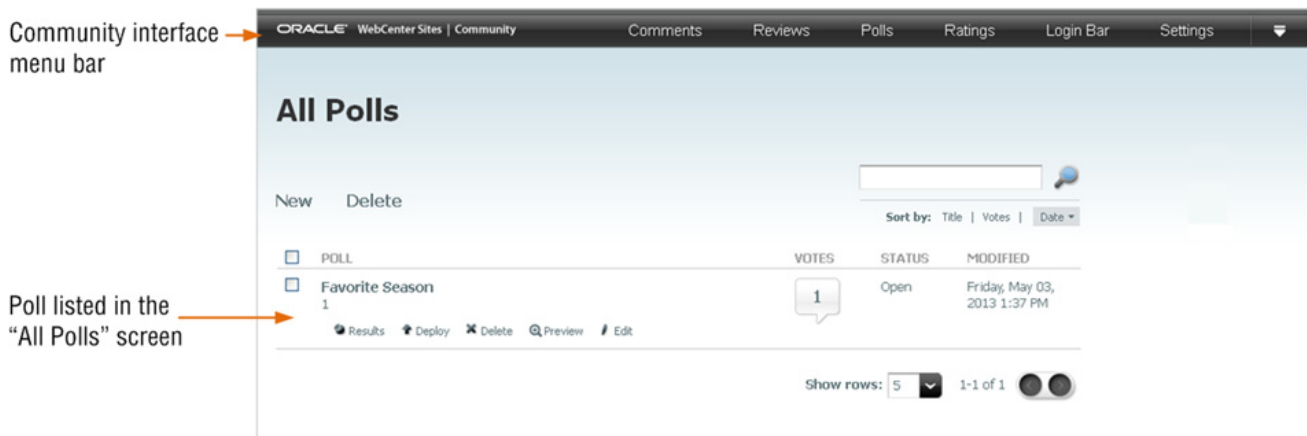
Designers can also deploy comments, reviews, ratings, and poll widget tags. For more information about deploying community widget tags, see Section 24.2, "How Do I Deploy Community Widget Tags?."

24.2 How Do I Deploy Community Widget Tags?

This scenario is for designers, and provides instructions for deploying a Comments widget tag. In this scenario, the Community application is assigned to the WebCenter Sites `FirstSiteII` sample site. You will be inserting the Comments widget tag into the `FSIILayout` template. Once this template is published, any web pages that display assets rendered by the `FSIILayout` template (for example, the content of the `FSIIAbout` asset) will also display a Comments widget.

> **Note:** Keep in mind the following:
>
> - To deploy a widget tag, you must have access to the WebCenter Sites Admin interface (**Admin**). Ensure that the WebCenter Sites Admin application is assigned to the same site as the Community application.
>
> - If you wish to reconfigure the default settings and visitor permissions for the Comments widget tag before you deploy the tag, see Section 25.3, "Reconfiguring the Comments Widget's Default Settings."
>
> - If you wish to test the current widget tag settings and visitor permissions without using a WebCenter Sites CM site, insert the tag into an `html` page instead to view the configurations you are starting with.
>
> - If Community-Gadgets is integrated with WebCenter Sites, you can deploy community widget tags directly from the WebCenter Sites Contributor interface. For more information, see Chapter 12, "Working with Widgets and Gadgets in the Contributor Interface."

To deploy community widget tags (Comments widget tag)

1. Log in to WebCenter Sites with designer credentials, select the site on which the Community application is enabled (`FirstSiteII` sample site in this example), and then select the icon for the WebCenter Sites **Community** interface.

2. In the menu bar, select **Comments**, then select **Deploy**, and then select **Comments**.

   The "Comments Deployment" screen opens, as shown in Figure 24–7:

Figure 24–7   'Comments Deployment' Screen
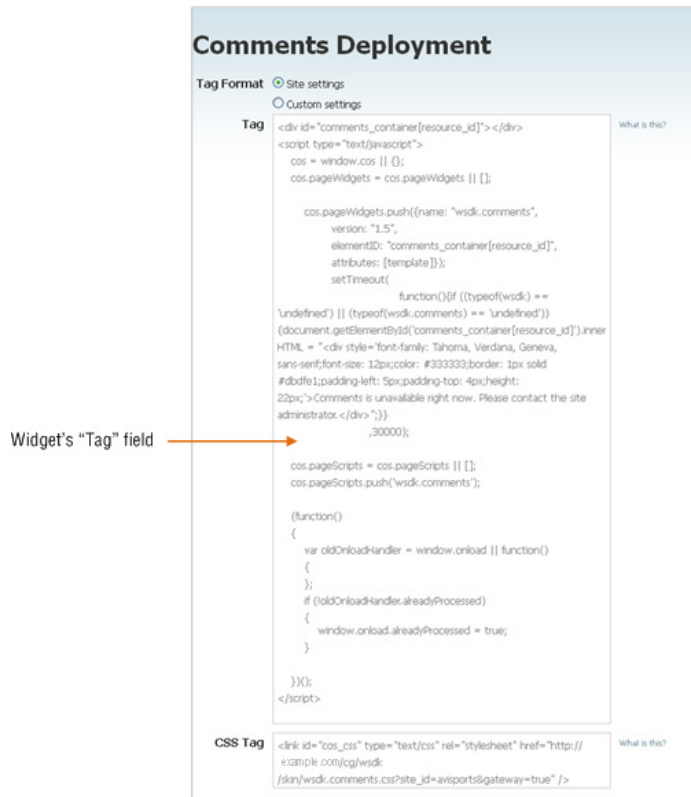
This graphic shows the Comments Deployment screen and points out the widget's "Tag" field and "CSS Tag" field.

****

3. Deploy the widget tag (in this example, we are deploying the Comments widget tag):

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Access the WebCenter Sites Admin interface:

      a. In the menu bar, point to the down-arrow icon, located at the extreme right of the screen, to render the applications bar.

      b. In the applications bar, click the **Admin** icon.

      The WebCenter Sites Admin interface opens, as shown in Figure 24–8.

Figure 24–8   WebCenter Sites Admin Interface
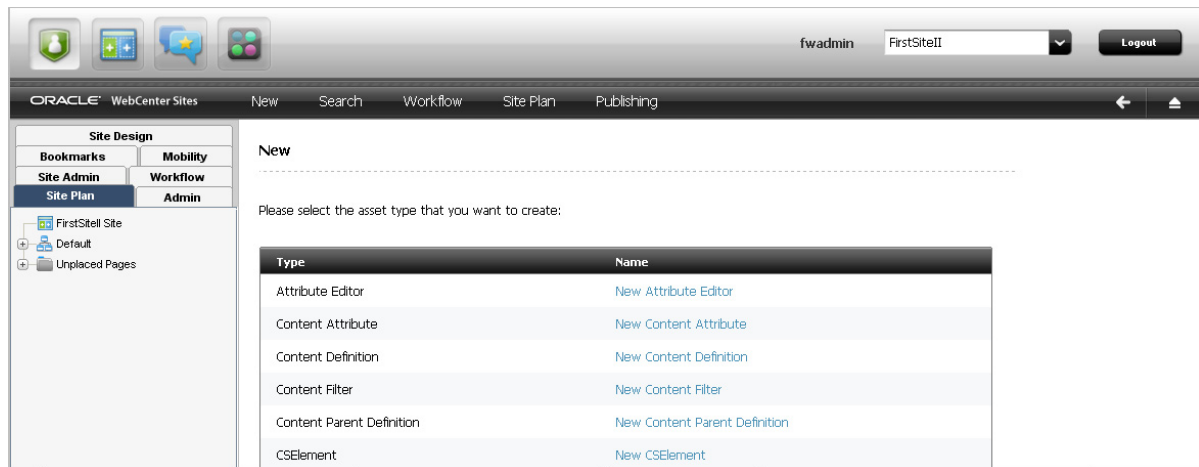
c. In the WebCenter Sites Admin interface, locate the template into which you wish to insert the widget tag (`FSIILayout` template in this example):

   a. From the start menu options, click **Search**.

   b. In the "Search" list, select **Find Template**.

   c. In the "Search for: Templates" form, click **Search**.

   d. In the "List of Templates" screen, select the template into which you wish to insert the widget tag. (`FSIILayout` template in this example.)

d. In the template's Inspect form, click **Edit**.

e. In the template's "Element" screen, insert (**Ctrl+V**) the widget tag into the **Element Logic** field in the exact location you want to display the widget.

Figure 24–9 'Element Logic' Field
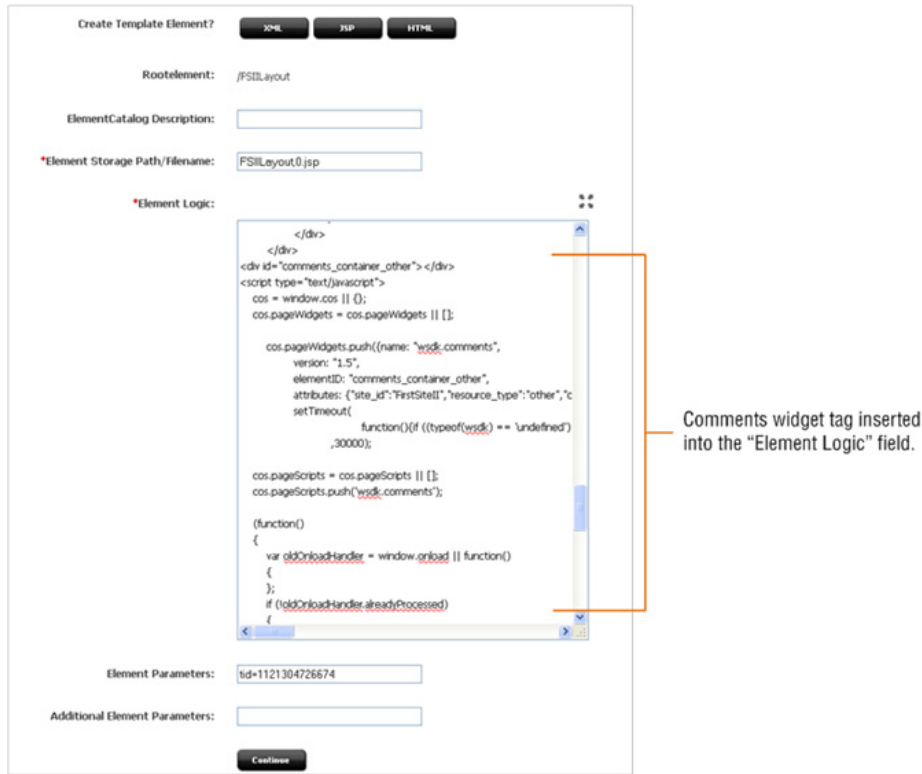
f. Click **Save**.

4. If you are deploying multiple widgets on the same page, deploy the CSS tag. The CSS tag loads all widget CSS files at the same time, decreasing the load time of a page on which multiple widgets are deployed. For detailed information and instructions about deploying the CSS tag, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

5. Preview the widget to ensure it is properly rendered on the website:

   a. Switch to the WebCenter Sites Contributor interface. In the menu bar, click the **down-arrow** to open the applications bar. In the applications bar, select the **Contributor** icon.

   b. Find an asset that is rendered by the template containing the widget tag. In the **Search** field, enter the desired search criteria and then click the **magnifying glass** button.

   A "Search" tab opens listing the results of your search.

   c. In the search results list, right-click the desired asset and select **Preview** from the context menu.

   The asset's preview opens displaying the widget (Comments widget in this example), as shown in Figure 24–10:

Figure 24–10   Preview of an Asset Displaying the Deployed Comments Widget
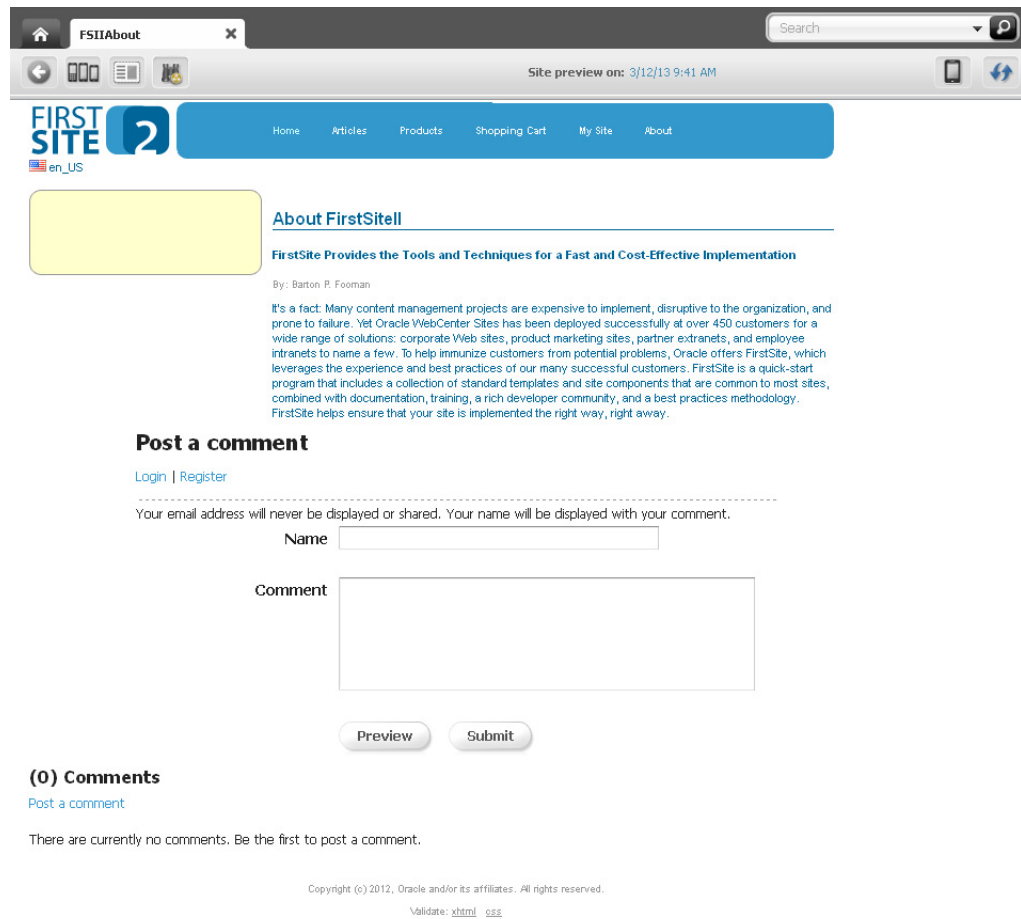
– If you want to publish the template to the website, see step 6.

– If you want to reconfigure default settings for the Comments widget tag, see Section 25.3, "Reconfiguring the Comments Widget's Default Settings."

– If you want to reconfigure and deploy another type of widget tag, see one of the following chapters:

Chapter 26, "Working with the Reviews Widgets"

Chapter 27, "Working with Ratings Widgets"

Chapter 28, "Working with the Login Bar Widget"

Chapter 29, "Working with Polls"

– If you want to configure community widget settings, such as security, language, and moderation settings, see Chapter 30, "Configuring Community Widget Settings."

6. Publish the template. For instructions, see the publishing chapters in the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

7. Access the website to view the widget on a web page.

The web page should look similar to Figure 24–11.

Figure 24–11   Web Page Displaying the Comments Widget
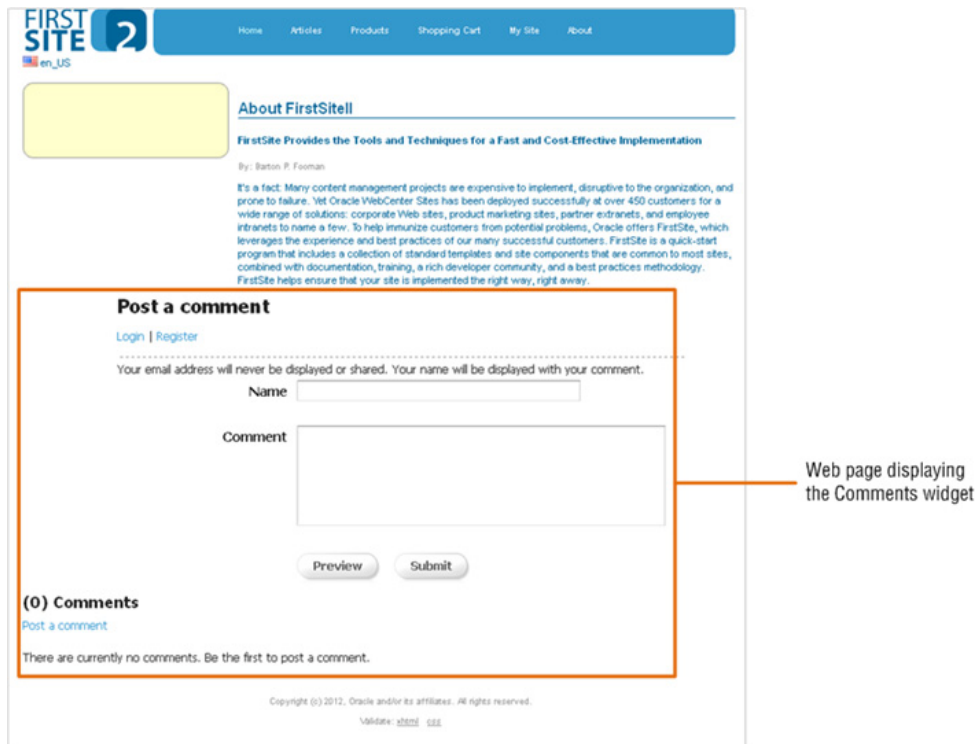
24.3 Next Steps

The next chapters provide information and instructions for moderating visitors' comments, reviews, and ratings, as well as viewing poll results. The next chapters also provide information about configuring and deploying the Comments, Reviews, Ratings, Polls, and Login Bar widgets. You will also learn how to configure global community widget settings, such as the language in which community widgets are displayed on the website.

25

Working with the Comments Widgets

This chapter provides a quick reference for moderating the comments posted to your site by visitors, configuring the visitor permissions and appearance settings for the Comments widget, and deploying the Comments widget (and all related widgets) to a web page with either dynamic (default) or custom settings.

This chapter contains the following sections:

- Overview
- Moderating Comments
- Reconfiguring the Comments Widget's Default Settings
- Deploying the Comments Widget Tags

25.1 Overview

Figure 25–1 Comments Menu

The **Comments** menu (shown in Figure 25–1) is used to work with the Comments widget and all of its related widgets (Comments Summary, Links to Topics, Recently Commented, and Most Commented). The Comments menu provides you with options to moderate the comments that visitors post to the pages of your website, configure visitor permissions and appearance settings for the Comments widget, and deploy the Comments widget and all related widgets (with either default or custom settings) to web pages.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In."

25.2 Moderating Comments

This section is for users assigned the `Moderator` role. You can moderate the comments that site visitors post to your website in the following ways:

- Moderating All Comments
- Moderating Comments by Topic
- Moderating Comments by User

25.2.1 Moderating All Comments

To access the "All Comments" screen (shown in Figure 25–2), select **Comments** from the menu bar, then select **Moderate**, and then select **All Comments**. The "All Comments" screen is used to moderate all of the comments that have been posted to the pages of your website. The comments are listed in the order they were posted (most recent to least recent). You can sort the comments in this list by either the visitor who posted the comment or the date the comment was posted.

Figure 25–2   'All Comments' Screen
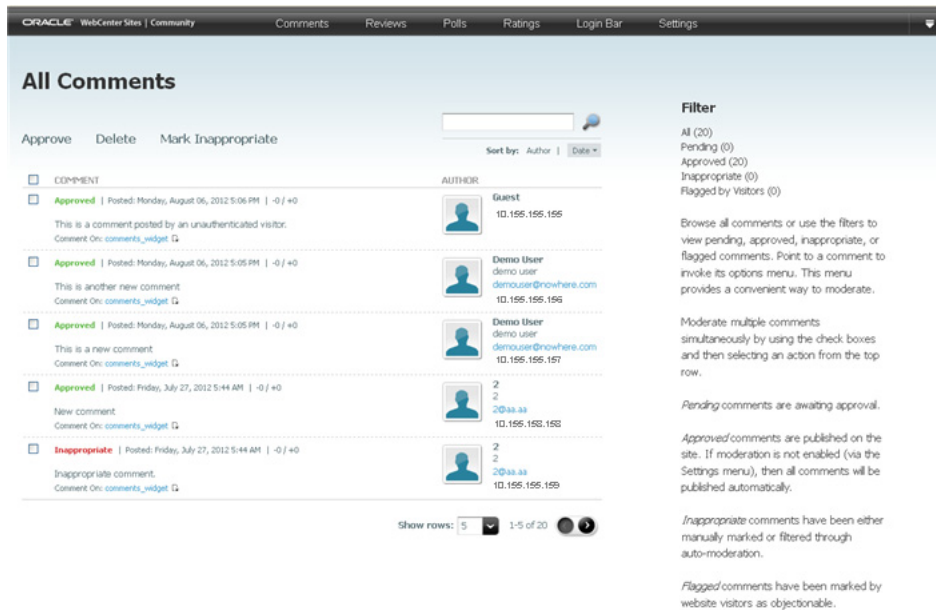
Table 25–1   Moderating All Comments

Action	Instructions
Approve visitors' comments	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to the comment you wish to approve.
	3. In the menu that appears, select **Approve**.
	The approved comment is displayed on the website

Table 25–1   (Cont.) Moderating All Comments

Action	Instructions
Delete visitors' comments	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to the comment you wish to delete.
	3. In the menu that appears, select **Delete**.
	4. In the confirmation box, click **OK**.
	The comment is removed from the Community interface and from the web page to which it was posted.
Mark a comment as inappropriate	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to the comment that contains inappropriate or inaccurate content.
	3. In the menu that appears, select **Mark Inappropriate**.
	The status of the comment changes to **Inappropriate** and the comment is not displayed on the web page. Marking the comment as inappropriate indicates to other moderators that the comment must be modified before being displayed on the website.
	Note: Comments can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Modify a comment	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to the comment you wish to modify.
	3. In the menu that appears, click **Edit**.
	The "Edit Comment" screen is displayed.
	4. In the "Comment" field, make the desired changes to the content.
	5. Click **Save**.
	The modified comment is displayed in the Community interface and on the web page to which it was posted.
	Note: If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the comment you modified to display it on the web page.
Add an authenticated visitor to the "Visitor Whitelist"	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to a comment posted by the authenticated visitor you wish to add to the whitelist.
	3. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."

Table 25–1   (Cont.) Moderating All Comments

Action	Instructions
Add a visitor to the "Visitor Blacklist"	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to a comment posted by the visitor you wish to add to the blacklist.
	3. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the "Visitor Blacklist," see Section 30.2.3, "Working with the Visitor Blacklist Screen."
Search for a comment containing specific content	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the "Search" field, enter the criteria you wish to search for.
	3. Click the **magnifying glass** icon.
	Only comments containing the search criteria you specified are listed in the "All Comments" screen.
Identify a flagged comment	A comment that is flagged on the website by a visitor will be listed in the "All Comments" screen with **Flagged** posted next to its **Approved** status.
View a topic on the website	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, navigate to the comment that is posted to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Comments widget, and the comments that visitors posted to the page.
View all comments posted by a specific visitor	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, navigate to the comment that is posted by the desired authenticated visitor.
	3. Click the visitor's name.
	The "User Comments" screen opens and displays only the comments posted by the selected visitor.
	Note: For information about moderating comments by user, see Section 25.2.3, "Moderating Comments by User."
View all comments posted to a specific topic	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, navigate to the comment that is posted to the desired topic.
	3. Click the name of the topic.
	The "All Comments" screen opens and displays only the comments posted to the selected topic.
	Note: For information about moderating comments by topic, see Section 25.2.2, "Moderating Comments by Topic."

Table 25–1   (Cont.) Moderating All Comments

Action	Instructions
Post a reply to a comment	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**.
	2. In the list of comments, point to the comment to which you wish to post a reply.
	3. In the menu that appears, click **Reply as Admin**. The "Reply as Admin" screen opens.
	4. In the "Reply" field, enter the content of the reply.
	5. Click **Save**. The reply is displayed in the "All Comments" list and on the web page that displays the comment to which the reply was posted.
	Note: You can only post a reply to comments with a status of approved.

25.2.2 Moderating Comments by Topic

To access the "Comments by Topic" screen (shown in Figure 25–3), select **Comments** from the menu bar, then select **Moderate**, and then select **Comments by Topic**. The "Comments by Topic" screen is used to sort all comments that have been posted to the pages of your website by the title of the topic (web page) to which the comments are posted. When you select the title of a topic from this screen, the "All Comments" screen opens and displays only the comments posted to that topic.

Figure 25–3 'Comments by Topic' Screen
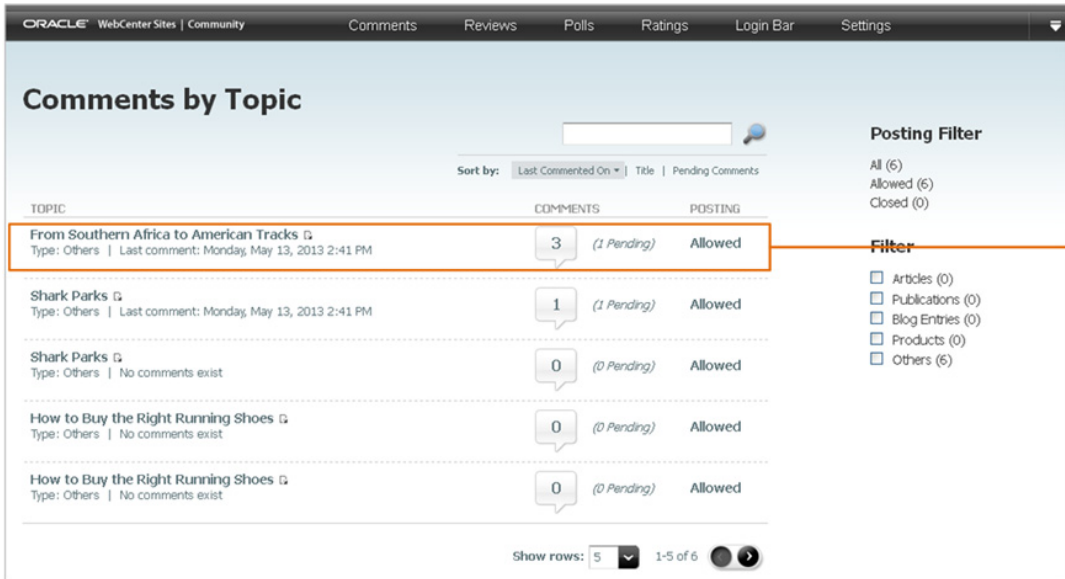
Clicking the name of a topic in the "Comments by Topic" screen opens the "All Comments" screen, which displays only the comments posted to that topic.

Table 25–2   Moderating Comments by Topic

Action	Instructions
Filter topics by resource type (topic type)	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Filter" panel, select the checkbox(es) of the desired resource type(s).
	The web pages (topics) with Comments widgets of the selected resource type(s) are the only web pages listed in the Comments by Topic screen.
	3. Select the name of the topic whose comments you wish to view.
	The "All Comments" screen opens and displays only the comments posted to the selected topic.
	Note: The resource types (topic types) available in the "Filter" panel are dynamically modified by the current category file (Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings"). "Others" refers to Comments widgets (and topics) that do not belong to a resource type.
Approve visitors' comments	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to the comment you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved comment is displayed on the website.
Delete visitors' comments	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to the comment you wish to delete.
	4. In the menu that appears, select **Delete**.
	5. In the confirmation box, click **OK**.
	The comment is removed from the Community interface and from the web page to which it was posted.
Mark a comment as inappropriate	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to the comment that contains inappropriate or inaccurate content.
	4. In the menu that appears, select **Mark Inappropriate**.
	The status of the comment changes to **Inappropriate**. Marking the comment as inappropriate indicates to other moderators that the comment must be modified before being displayed on the website.
	Note: Comments can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."

Table 25–2   (Cont.) Moderating Comments by Topic

Action	Instructions
Modify a comment	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to the comment you wish to modify.
	4. In the menu that appears, click **Edit**.
	The "Edit Comment" screen is displayed.
	5. In the "Comment" field, make the desired changes to the content.
	6. Click **Save**.
	The modified comment is displayed in the Community interface and on the web page to which it was posted.
	Note: If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the comment you modified to display it on the web page.
Add an authenticated visitor to the "Visitor Whitelist"	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to a comment posted by the authenticated visitor you wish to add to the whitelist.
	4. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."
Add a visitor to the "Visitor Blacklist"	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to moderate.
	3. In the "All Comments" screen for the topic you selected, point to a comment posted by the visitor you wish to add to the blacklist.
	4. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the "Visitor Blacklist," see Section 30.2.3, "Working with the Visitor Blacklist Screen."

Table 25–2   (Cont.) Moderating Comments by Topic

Action	Instructions
Post a reply to a comment	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic to which the comment you wish to reply is posted.
	3. In the "All Comments" screen for the topic you selected, point to the comment to which you wish to post a reply.
	4. In the menu that appears, click **Reply as Admin**.
	The "Reply as Admin" screen opens.
	5. In the "Reply" field, enter the content of the reply.
	6. Click **Save**.
	The reply is displayed in the "All Comments" list and on the web page that displays the comment to which the reply was posted.
	Note: You can only post a reply to comments with a status of approved.
Search for a topic	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Search" field, enter search criteria identifying the desired topic.
	3. Click the **magnifying glass** icon.
	Only topics containing the specified search criteria are listed in the "Comments by Topic" screen.
Enable or disable the comments widget deployed on a given topic (web page)	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comment by Topic**.
	2. In the list of topics, point to the topic whose comments widget you wish to either enable or disable.
	Note: You cannot enable a topic's Comments widget if one of the following is true: The Comments widget was closed automatically due to the settings in the "Commenting Auto Disable" section of the "Comments Appearance" screen, or the Comments widget was deployed with a "Post Status" of **Closed** (set from the "Comments Deployment" screen).
	3. Enable or disable the comments widget. If you wish to allow visitors to post comments to the selected topic, in the context menu select **Allow Posting**. If you wish to disable the comments widget deployed on the selected topic, in the context menu select **Close Posting**.
	If you selected **Allow Posting**, visitors can post comments to the selected topic. If you selected **Close Posting**, visitors cannot post comments to the selected topic.
	Note: You can use the "Posting Filter" to filter the topics displayed in the "Comments by Topic" list by the status of the comments widget deployed on the topic. For example, if you select **Allowed** in the "Posting Filter" section, then only the topics that allow visitors to post comments will be displayed in the list and vice versa.

Table 25–2 (Cont.) Moderating Comments by Topic

Action	Instructions
Identify a flagged comment	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, select the topic whose comments you wish to view.
	3. In the "All Comments" screen for the topic you selected, identify any flagged comments.
	A comment that is flagged on the website will appear in the list of comments with **Flagged** posted next to its **Approved** status.
View a topic on the website	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, navigate to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Comments widget, and the comments visitors posted to the page.
View all the comments posted by a specific visitor	**1.** In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by Topic**.
	2. In the "Comments by Topic" screen, navigate to and click the name of the topic to which the desired visitor posted a comment.
	3. In the "All Comments" screen for the topic you selected, navigate to the comment posted by the desired visitor and click the visitor's name (located to the right of the comment the visitor posted).
	The "User Comments" screen opens and displays all of the comments posted by the selected visitor.
	Note: For more information about moderating comments by user, see Section 25.2.3, "Moderating Comments by User."

25.2.3 Moderating Comments by User

To access the "Comments by User" screen (shown in Figure 25–4), select **Comments** from the menu bar, then select **Moderate**, and then select **Comments by User**. The "Comments by User" screen is used to sort all comments posted to the website by the names of the visitors who posted the comments. When you select a visitor's name from this screen, the "User Comments" screen opens and displays the comments the visitor has posted along with the visitor's user name, profile picture, and e-mail address (if available).

Figure 25–4   'Comments by User' Screen

Clicking a visitor's name in the "Comments by User" screen opens the "User Comments" screen, which displays the selected visitor's profile information along with all the comments that visitor has posted to the website.

Table 25–3   Moderating Comments by User

Action	Instructions
Approve visitors' comments	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to moderate.
	3. In the "User Comments" screen, point to the comment you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved comment is displayed on the website
Delete visitors' comments	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to moderate.
	3. In the "User Comments" screen, point to the comment you wish to delete.
	4. In the menu that appears, select **Delete**.
	5. In the confirmation box, click **OK**.
	The comment is removed from the Community interface and from the web page to which it was posted.
Mark a comment as inappropriate	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to moderate.
	3. In the "User Comments" screen, point to the comment that contains inappropriate or inaccurate content.
	4. In the menu that appears, select **Mark Inappropriate**.
	The status of the comment changes to **Inappropriate**. Marking the comment as inappropriate indicates to other moderators that the comment must be modified before being displayed on the website.
	Note: Comments can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Modify a comment	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to moderate.
	3. In the "User Comments" screen, point to the comment you wish to modify.
	4. In the menu that appears, select **Edit**.
	The "Edit Comment" screen is displayed.
	5. In the "Comment" field, make the desired changes to the content.
	6. Click **Save**.
	The modified comment is displayed in the Community interface and on the web page to which it was posted.
	Note: If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the comment you modified to display it on the web page.

Table 25–3   (Cont.) Moderating Comments by User

Action	Instructions
Add an authenticated visitor to the "Visitor Whitelist"	If you know which authenticated visitor you want to add to the whitelist, do the following: 1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**. 2. In the "Comments by User" screen, point to the visitor's name. 3. In the menu that appears, click **Whitelist Author**. The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors. If you wish to view the comments posted by the visitor before adding that visitor to the whitelist, do the following: 1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**. 2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to view. 3. In the "User Comments" screen, point to any of the comments displayed in the list. 4. In the menu that appears, click **Whitelist Author**. The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors. **Note:** For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."
Add an authenticated visitor to the "Visitor Blacklist"	If you know which visitor you want to add to the blacklist, do the following: 1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**. 2. In the "Comments by User" screen, point to the visitor's name. 3. In the menu that appears, click **Blacklist Author**. The "Visitor Blacklist" screen opens, and the visitor's name is displayed in the list of blacklisted visitors. If you wish to view the comments posted by the visitor before adding that visitor to the blacklist, do the following: 1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**. 2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to view. 3. In the "User Comments" screen, point to any of the comments displayed in the list. 4. In the menu that appears, click **Blacklist Author**. The "Visitor Blacklist" screen opens, and the visitor's name is displayed in the list of blacklisted visitors. **Note:** For more information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

Table 25–3   (Cont.) Moderating Comments by User

Action	Instructions
Search for a specific visitor	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Search" field, enter the name of the visitor you wish to search for.
	3. Click the **magnifying glass** icon.
	Only visitor names that match the specified search criteria are displayed in the "Comments by User" screen.
Identify a flagged comment	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comments you wish to view.
	3. In the "User Comments" screen, identify the flagged comments.
	A comment that is flagged on the website will appear in the list of comments with **Flagged** posted next to its **Approved** status.
View a topic on the website	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comment is posted to the desired topic.
	3. In the "User Comments" screen, navigate to the desired comment.
	4. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Comments widget, and the comments visitors posted to the page.
Post a reply to a comment	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of the visitor whose comment you wish to post a reply to.
	3. In the "User Comments" screen, point to the comment to which you wish to post a reply.
	4. In the menu that appears, click **Reply as Admin**.
	The "Reply as Admin" screen opens.
	5. In the "Reply" field, enter the content of the reply.
	6. Click **Save**.
	The reply is displayed in the "All Comments" screen (in the menu bar, select **Comments**, then select **Moderate**, and then select **All Comments**) and on the web page that displays the comment to which the reply was posted.

Table 25–3   (Cont.) Moderating Comments by User

Action	Instructions
View all the comments posted to a specific topic	1. In the menu bar, select **Comments**, then select **Moderate**, and then select **Comments by User**.
	2. In the "Comments by User" screen, select the name of a visitor who posted a comment to the desired topic.
	3. In the "User Comments" screen, navigate to the comment the visitor posted to the desired topic, and click the name of the topic (located under the visitor's comment).
	The "All Comments" screen for the topic you selected opens and displays all of the comments posted to that topic.
	Note: For more information about moderating comments by topic, see Section 25.2.2, "Moderating Comments by Topic."

25.3 Reconfiguring the Comments Widget's Default Settings

Default settings are a widget's saved appearance and permission settings. Users assigned the `Designer` role can modify the default appearance of the Comments widget by selecting **Comments, Configure,** and then **Appearance** in the menu bar. Users assigned the `Moderator` role can reconfigure the default commenting permissions by selecting **Comments, Configure,** and then **Permissions** in the menu bar. Once the permission and appearance settings are saved, the system dynamically updates the Comments widget's default tag in the Community interface and on pages where tags with default settings are deployed.

You can reconfigure the default settings of the Comments widget in the following ways:

- Reconfiguring the Comments Widgets' Appearance Settings
- Reconfiguring the Comments Wigets' Permissions Settings

25.3.1 Reconfiguring the Comments Widgets' Appearance Settings

To access the "Comments Appearance" screen (shown in Figure 25–5), select **Comments** from the menu bar, then select **Configure**, and then select **Appearance**. This screen can be used by designers to reconfigure the Comments widget's color schema, sort order, and other display properties.

Figure 25–5   'Comments Appearance' Screen

Table 25–4   Reconfiguring the Comments Widget's Appearance Settings

Section	Field	Description
General	Show Comments	Select either **Display** or **Do not Display** to specify whether approved comments are displayed to site visitors.
General	Comment Type	Select whether your deployment supports a **Flat** commenting structure, or a **Threaded** commenting structure which allows replies to comments.

Table 25–4   (Cont.) Reconfiguring the Comments Widget's Appearance Settings

Section	Field	Description
General	Pagination	Select the number of approved comments that will be displayed on a given page at one time.
General	Display Order	Select one of the following to specify the order in which approved comments will be displayed on a given page: ■ **Oldest at the top** – Displays the oldest comments at the top of the list of comments. ■ **Newest at the top** – Displays the most recently posted comments at the top of the list of comments. ■ **Most ranked at the top** – Displays the comments that site visitors frequently rank at the top of the list of comments. ■ **Least ranked at the top** – Displays the comments that site visitors rank the least (or have not ranked) at the top of the list of comments.
General	Comment Submit Box	Specify whether the comment field will be displayed **At the top** or **At the bottom** of the list of comments on a given page.
General	Comment Ranking	Specify whether visitors can rank individual comments as **Helpful** or **Not Helpful**. Select one of the following: ■ **Enabled for all visitors** – All visitors (authenticated and anonymous) can rank the comments posted to a web page. ■ **Enabled for registered visitors** – Only authenticated visitors can rank the comments posted to a web page. ■ **Disabled** – Individual comments cannot be ranked.
General	Skin	Select **Default** to use the default color schema for the Comments widget, or select **Custom** to upload your own CSS file.
General	Upload Custom CSS	If you selected the **Custom** option in the Skin field, use the **Browse** button to select a cascading style sheet (CSS) that will control the appearance of the Comments widget.
General	Login Bar Required	Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with the Comments widget tag. **Note:** If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Comments widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").
Commenting Auto Disable	Max Number of Comments Allowed	Use the drop-down menu to select the maximum number of comments that can be posted to a given web page. Once the maximum number of comments is reached, visitors cannot post comments to that particular web page. **Note:** You can also enter the maximum number of comments that can be posted to a given web page (for example, to specify 50 as the maximum number of comments that can be posted, enter 50 into this field).

Table 25–4   (Cont.) Reconfiguring the Comments Widget's Appearance Settings

Section	Field	Description
Commenting Auto Disable	Accept Comments Until	Use the drop-down menu to select the maximum number of days comments can be posted to a given web page. Once the specified number of days is reached, visitors cannot post comments to that particular web page.
		Note: You can also enter the maximum number of days comments can be posted to a given web page (for example, to specify 30 as the maximum number of days comments can be posted, enter 30 into this field).
Comment Body	Max Length	Select either **450 characters** or **900 characters** to set the comment field size.
Comment Body	Type	Specify the type of text that can be entered into the comment field. Select one of the following: ■ **Plain text** – Visitors can only enter text into the comment field. ■ **HTML with blocked JS** – Visitors can enter text and basic HTML tags into the comment field. ■ **HTML and Media with blocked JS** – Visitors can enter text, basic HTML tags, videos, and so on into the comment field.
Help and Disclaimer	Show Help Text	Select either **Display** or **Do not display** to specify whether the Comments widget will display help text to visitors.
Help and Disclaimer	Help Text	If you selected **Display** in the "Show Help Text" field, enter the help text you wish to display to visitors. When the Comments widget is deployed, the help text is displayed above the comments submit box. **Note:** This field supports plain text and basic HTML tags. You can use HTML tags to control the appearance of your help text.
Help and Disclaimer	Show Disclaimer Text	Select either **Display** or **Do not display** to specify whether the Comments widget will display a disclaimer to visitors.
Help and Disclaimer	Disclaimer Text	If you selected **Display** in the "Show Disclaimer Text" field, enter the disclaimer text you wish to display to visitors. When the Comments widget is deployed, the disclaimer is displayed beneath the comments submit box. **Note:** This field supports plain text and basic HTML tags. You can use HTML tags to control the appearance of your disclaimer.

Table 25–4   (Cont.) Reconfiguring the Comments Widget's Appearance Settings

Section	Field	Description
Topic Categories	Upload Categories	Use the **Browse** button to upload the desired category file, which will dynamically modify the resource types available from:
		■ The Resource Type field in the Comments widget tag's custom deployment screen (Section 25.4.3.1, "Custom Comments Widget Tag's Deployment Screen").
		■ The Resource Type field in the Recently Commented (Section 25.4.3.4, "Custom Recently Commented Widget Tag's Deployment Screen") and Most Commented (Section 25.4.3.5, "Custom Most Commented Widget Tag's Deployment Screen") widget tag deployment screens.
		■ The Comments by Topic screen's Filter panel (Section 25.2.2, "Moderating Comments by Topic").
		Note: The category file must be in `.txt` format, the resource types listed in the file must be in a `key=value` structure, only an English alphanumeric string is permitted for the `key` in the `key=value` pairs, each resource type listed in the file must be on its own line, and the size of the file you are uploading can be no more than 100KB.

25.3.2 Reconfiguring the Comments Wigets' Permissions Settings

To access the "Commenter Permissions" screen (shown inFigure 25–6), select **Comments** from the menu bar, then select **Configure**, and then select **Permissions**. This screen can be used by moderators to display or hide comment fields and set visitors' permissions to comment.

Figure 25–6   'Commenter Permissions' Screen

Table 25–5   Reconfiguring Commenting Permissions for Site Visitors

Section	Field
Commenting Enabled	■ **Yes** configures the widget to display a comment field.
	■ **No** hides the comment field, but displays only approved comments, if the widget was previously enabled.

Table 25–5   (Cont.) Reconfiguring Commenting Permissions for Site Visitors

Section	Field
Who Can Comment?	Available only if the widget is configured to display a comment field:

     ■ **Anonymous users can comment** grants commenting permissions to all site visitors.

         The following options are available only if anonymous visitors can comment:

         User must enter a name requires anonymous visitors to specify a name when posting a comment.

         User must enter an email address requires anonymous visitors to specify an email address when posting a comment.

         User must enter a verification code requires anonymous visitors to enter the letters and/or numbers of a CAPTCHA image before they can post a comment to a web page.

         Note: By default, the **User must enter a verification code** option is greyed out (not available). For information about enabling this option, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

     ■ **Authenticated users only** grants commenting permissions only to authenticated site visitors.

         User can modify and delete their own comment allows authenticated visitors to modify and delete the comments they post.

25.4 Deploying the Comments Widget Tags

This section is for users assigned the `Designer` role. You can deploy the Comments widget tag and all of its related widget tags with either default or custom settings by selecting **Comments**, **Deploy**, and then selecting *the name of the widget tag you wish to deploy* in the menu bar. Table 25–6 lists the widget tags related to commenting functionality and indicates which type of deployment each tag supports.

Table 25–6   Deploying the Comments Widget Tags

Widget Tag	Deploy with Default Settings	Deploy Custom Settings
Comments	Yes	Yes
Comments Summary	No	Yes
Links to Topics	No	No
Recently Commented	Yes	Yes
Most Commented	Yes	Yes

This section contains the following topics:

- Section 25.4.1, "Deploying a Default Comments Widget Tag"

- Section 25.4.2, "Deploying Custom Comments Widget Tags"

- Section 25.4.3, "Custom Widget Tag Deployment Screens"

25.4.1 Deploying a Default Comments Widget Tag

Several types of comments widgets can be deployed with default settings: Comments, Recently Commented, and Most Commented. The default settings for the Comments widget are its saved settings, which are configured in the "Permissions" screen (select

Comments, **Configure**, and then **Permissions**) and "Appearance" screen (select **Comments**, **Configure**, and then **Appearance**). The default settings for all other commenting related widgets are configured out-of-the-box and cannot be reconfigured in the Community interface. Each type of comments widget has its own deployment screen, which displays the widget tag. The default settings are used as property values in the widget tag.

To deploy default comments widget tags

1. In the menu bar, select **Comments, Deploy,** and the *name of the widget tag you wish to deploy*:

    - **Comments** – to deploy the Comments widget tag. If commenting is enabled (in the "Commenter Permissions" screen), the Comments widget displays a comment field. If displaying comments is enabled (in the "Comments Appearance" screen), then a list of site visitors' comments is displayed on the web page.

        Note: If any of the following deployment scenarios are true, you will have to customize the Comments widget by specifying a resource ID:

        - You wish to link the Links to Topics widget to a Comments widget.

        - You want to deploy the Comments Summary widget on a web page different from the one on which a Comments widget is deployed.

        - You want to deploy two or more Comments widgets on the same web page.

        For more information, see the description of the Resource ID field in Table 25–7.

    - **Recently Commented** – to deploy the Recently Commented widget tag. When deployed, this widget displays a list of the top ten web pages (topics) to which site visitors have recently posted comments.

        Note: By default, the Recently Commented widget lists topics that have an associated Comments widget of resource type "Others." To configure the Recently Commented widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

    - **Most Commented** – to deploy the Most Commented widget tag. When deployed, this widget displays a list of the top ten web pages (topics) to which visitors frequently post comments.

        Note: By default, the Most Commented widget lists topics that have an associated Comments widget of resource type "Others." To configure the Most Commented widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

The deployment screen for each widget tag looks similar to the Comments Deployment screen, shown in Figure 25–7:

Figure 25–7   'Comments Deployment' Screen: Site Settings vs. Custom Settings

2. In the "Tag Format" field, make sure **Site settings** is selected.

3. Deploy the widget tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For detailed instructions, see steps 3 – 7 in Section 24.2, "How Do I Deploy Community Widget Tags?"

25.4.1.1 Hiding the Default Comments Widget

If you want to hide a default Comments widget that is displayed on various web pages, instead of accessing the template's source code, you (depending on your role in the Community application) can use the Comments widget's Permissions and Appearance screens.

1. If you are a moderator, hide the comment field:

   a. In the menu bar, select **Comments**, **Configure**, and then **Permissions**.

   b. In the "Commenting Enabled" field, select **No**.

   c. Click **Save**.

The comment field is now hidden from site visitors.

2. If you are a designer, hide the list of comments:

   a. In the menu bar, select **Comments**, **Configure**, and then **Appearance**.

   b. In the "Show Comments" field, select **Do not display**.

   c. Click **Save**.

   The list of comments is now hidden from site visitors.

25.4.2 Deploying Custom Comments Widget Tags

You can customize any widget tag related to commenting functionality (except Links to Topics) by settings its properties using the tag generator in the widget's Deployment screen. Each time a widget tag is customized, it must be redeployed because custom values cannot be saved in the Community interface; instead they are stored only in that particular instance of the widget tag.

To configure and deploy custom comments widgets

1. In the menu bar, select **Comments**, **Deploy**, and then the *name of the widget tag you wish to customize and deploy*:

   - **Comments** – to customize and deploy the Comments widget tag: that is, (1) Configure the Comments widget tag with a unique identifier and resource type so that it can be referred to by other commenting related widgets for its content, such as the number of comments and date of the most recently posted comment. (2) Specify the web page (topic title and URL) on which the Comments widget tag is deployed. (3) Reconfigure certain properties that were set as defaults in the tag's "Permissions" screen (select **Comments**, **Configure**, and then **Permissions**) and "Appearance" screen (select **Comments**, **Configure**, and then **Appearance**).

   - **Comments Summary** – to customize and deploy the Comments Summary widget tag; that is, specify the resource ID of a Comments widget in the "Comments Summary Deployment" screen. When deployed, the Comments Summary widget displays short, summarized information about the number of comments posted to the web page on which the specified Comments widget is deployed along with the date of the most recently posted comment.

   - **Links to Topics** – to customize and deploy the Links to Topics widget tag; that is, specify the resource ID of a Comments widget and, optionally, the resource URL of the web page to which you wish this widget to link. When deployed, the Links to Topics widget displays summarized information about the specified Comments widget, such as the number of comments posted to the web page (topic) on which that Comments widget is deployed along with a link to the desired web page (if you specified the URL of a web page in the Links to Topics widget tag).

     > **Note:** To configure the Links to Topics widget to display summarized information about and links to multiple Comments and/or Reviews widgets, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

   - **Recently Commented** – to customize and deploy the Recently Commented widget tag; that is, have the Recently Commented widget list topics of a desired type (instead of topics of type "Others") to which site visitors have

recently posted comments. For example, topics of type "Article" are posted on a web page; each article has its own Comments widget of resource type Article. If the Recently Commented widget is to list topics of type "Article" to which site visitors have recently posted comments, it must be configured to refer to the Comments widget by resource type.

Note: To configure the Recently Commented widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Most Commented** – to customize and deploy the Most Commented widget tag; that is, have the Most Commented widget list the most popular topics of a desired type (instead of topics of type Others). For example, topics of type "Article" are posted on a web page; each article has its own Comments widget of resource type Article. If the Most Commented widget is to list the most popular topics of type "Article," it must be configured to refer to the Comments widget by resource type.

Note: To configure the Most Commented widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

---

2. In the Tag Format field, select **Custom settings**. Customize the desired widget tag by setting values for the available fields in the tag's custom deployment screen.

   For field definitions, see:

   - Section 25.4.3.1, "Custom Comments Widget Tag's Deployment Screen"
   - Section 25.4.3.2, "Custom Comments Summary Widget Tag's Deployment Screen"
   - Section 25.4.3.3, "Links to Topics Widget Tag's Deployment Screen"
   - Section 25.4.3.4, "Custom Recently Commented Widget Tag's Deployment Screen"
   - Section 25.4.3.5, "Custom Most Commented Widget Tag's Deployment Screen"

3. Deploy the custom tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For instructions, see steps 3 – 7 in the section Section 24.2, "How Do I Deploy Community Widget Tags?."

25.4.3 Custom Widget Tag Deployment Screens

Once you access a given widget's custom deployment screen, you can use the available fields to set custom (temporary) values for the widget tag. These values are not saved, except in the template to which you copy the customized instance of the tag. This section provides field definitions.

25.4.3.1 Custom Comments Widget Tag's Deployment Screen

The screen shown in Figure 25–8 is used to define custom values for a particular instance of the Comments widget tag, which can then be deployed on web pages.

Figure 25–8 Custom 'Comments Deployment' Screen

> **Note:** The **Default** field value references the setting that is specified in the widget's Permissions or Appearance screen. If you choose a default setting for your custom tag, and you deploy the tag, the default setting will be dynamically updated if its value is modified and saved in the Community interface.

Table 25–7   Customizing and Deploying the Comments Widget Tag

Field	Description
Comment Type	Select whether your deployment supports a **Flat** commenting structure, or a **Threaded** commenting structure which allows replies to comments.
Resource ID	Enter a resource ID (unique identifier) for this instance of the Comments widget tag. This resource ID can be used in other comments widget tags (for example, the Comments Summary widget tag) to refer to this instance of the Comments widget. You can enter a maximum of 50 English alphanumeric characters into this field. This field is required if: ■ You want to configure other comments widget tags to refer to this Comments widget's content (for example, the number of comments posted to the web page). ■ You want to deploy more than one Comments widget on the same web page.
Resource Type	Select a resource type (topic type) for this instance of the Comments widget tag. The resource type of a Comments widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Comments widget is deployed is associated with the default Others resource type. **Note:** The current category file (Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings") determines the resource types that are available to you.
Comment Submit Box	Specify whether the comment field will be displayed **At the top** or **At the bottom** of the list of comments on a given page.
Display Order	Select one of the following to specify the order in which approved comments will be displayed on a given page: ■ **Most ranked at the top** – Displays the comments that site visitors frequently rank at the top of the list of comments. ■ **Oldest at the top** – Displays the oldest comments at the top of the list of comments. ■ **Newest at the top** – Displays the most recently posted comments at the top of the list of comments. ■ **Least ranked at the top** – Displays the comments that site visitors ranked the least (or have not ranked) at the top of the list of comments.
Comment Ranking	Specify whether visitors can rank individual comments as **Helpful** or **Not Helpful**. Select one of the following: ■ **Enabled for all visitors** – All visitors (authenticated and anonymous) can rank the comments posted to a web page. ■ **Enabled for registered visitors** – Only authenticated visitors can rank the comments posted to a web page. ■ **Disabled** – Individual comments cannot be ranked.

Table 25–7   (Cont.) Customizing and Deploying the Comments Widget Tag

Field	Description
Resource Title	Enter the title of the web page on which this instance of the Comments widget tag will be deployed.
Resource URL	Enter the URL of the web page on which this instance of the Comments widget tag will be deployed.
Post Status	Select either **Open** or **Close** to specify whether visitors can post comments to the page on which this instance of the Comments widget tag is deployed.
	Note: If you deploy the Comments widget with a "Post Status" of **Close** on a web page (topic), you cannot enable commenting on that web page (topic) from the "Comments by Topic" screen.
Login Bar Required	Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with this instance of the Comments widget tag.
	Note: If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Comments widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

25.4.3.2 Custom Comments Summary Widget Tag's Deployment Screen

The screen shown in Figure 25–9 is used to define custom values for a particular instance of the Comments Summary widget tag, which can then be deployed on web pages.

Figure 25–9 'Comments Summary Deployment' Screen
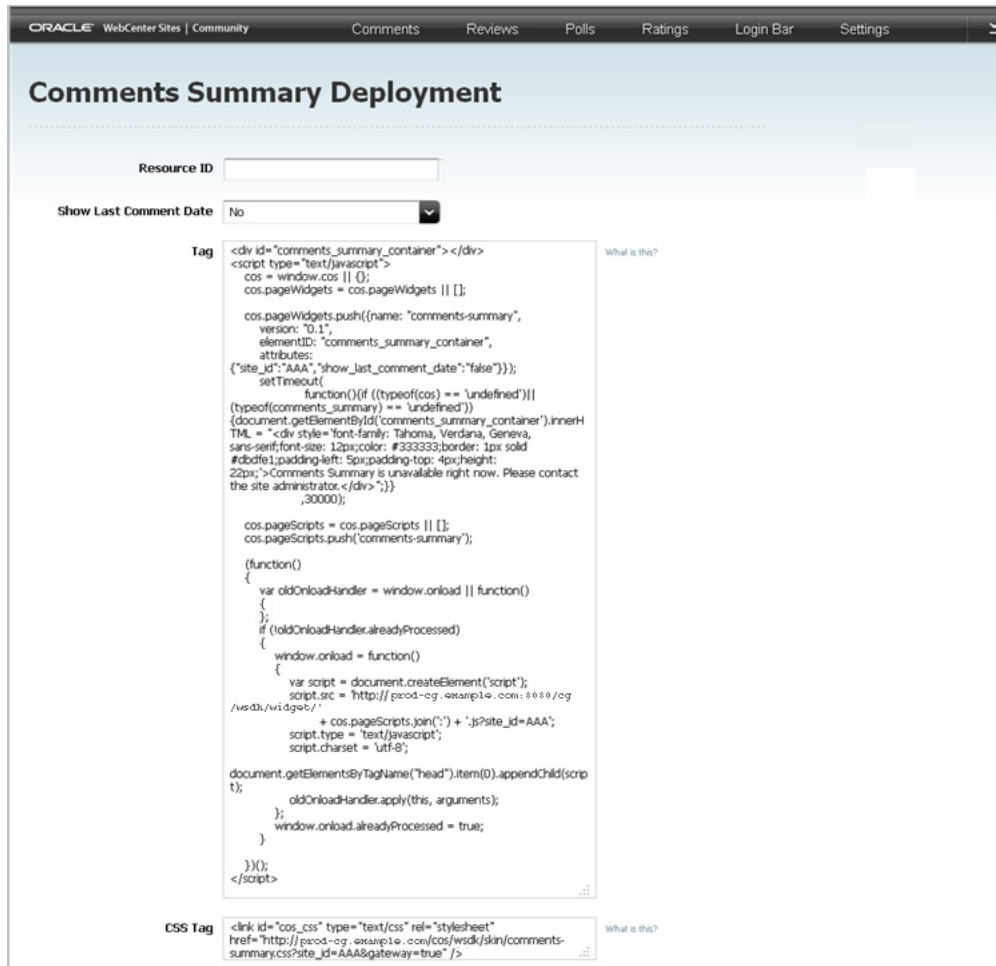
Table 25–8 Customizing and Deploying the Comments Summary Widget Tag

Field	Description
Resource ID	Specify the resource ID (unique identifier) of a Comments widget tag. When the Comments Summary widget is deployed, it displays summarized information about the number of comments posted to the web page on which the specified Comments widget is deployed.
Show Last Comment Date	Select **Yes** to display the most recent date a comment was posted to a given page, or select **No** to display only the number of comments posted to the page. **Default Value: No**

25.4.3.3 Links to Topics Widget Tag's Deployment Screen

The screen shown in Figure 25–10 is used to define custom values for a particular instance of the Links to Topics widget tag, which can then be deployed on web pages.

Figure 25–10   'Links to Topics Deployment' Screen

Table 25–9   Customizing and Deploying the Links to Topics Widget Tag

Field	Description
Resource ID	This field is required. Specify the resource ID (unique identifier) of a Comments widget tag. When the Links to Topics widget is deployed, it displays summarized information about the number of comments posted to the web page on which the specified Comments widget is deployed.

Table 25–9 (Cont.) Customizing and Deploying the Links to Topics Widget Tag

Field	Description
Resource URL	If you want the Links to Topics widget to redirect visitors to a certain web page when a visitor clicks the summarized information about a Comment widget, specify the resource URL of the desired web page.
	Note: If you do not specify a resource URL, when a visitor clicks the summarized information about the specified Comments widget, the Links to Topics widget redirects the visitor to the page on which the Comments widget (specified in the **Resource ID** field) is deployed. If there are multiple Comments widgets with the same resource ID deployed on a page, the Links to Topics widget redirects the visitor to the last active widget on that page.

25.4.3.4 Custom Recently Commented Widget Tag's Deployment Screen

The screen shown in Figure 25–11 is used to define custom values for a particular instance of the Recently Commented widget tag, which can then be deployed on web pages.

Figure 25–11 'Recently Commented Deployment' Screen
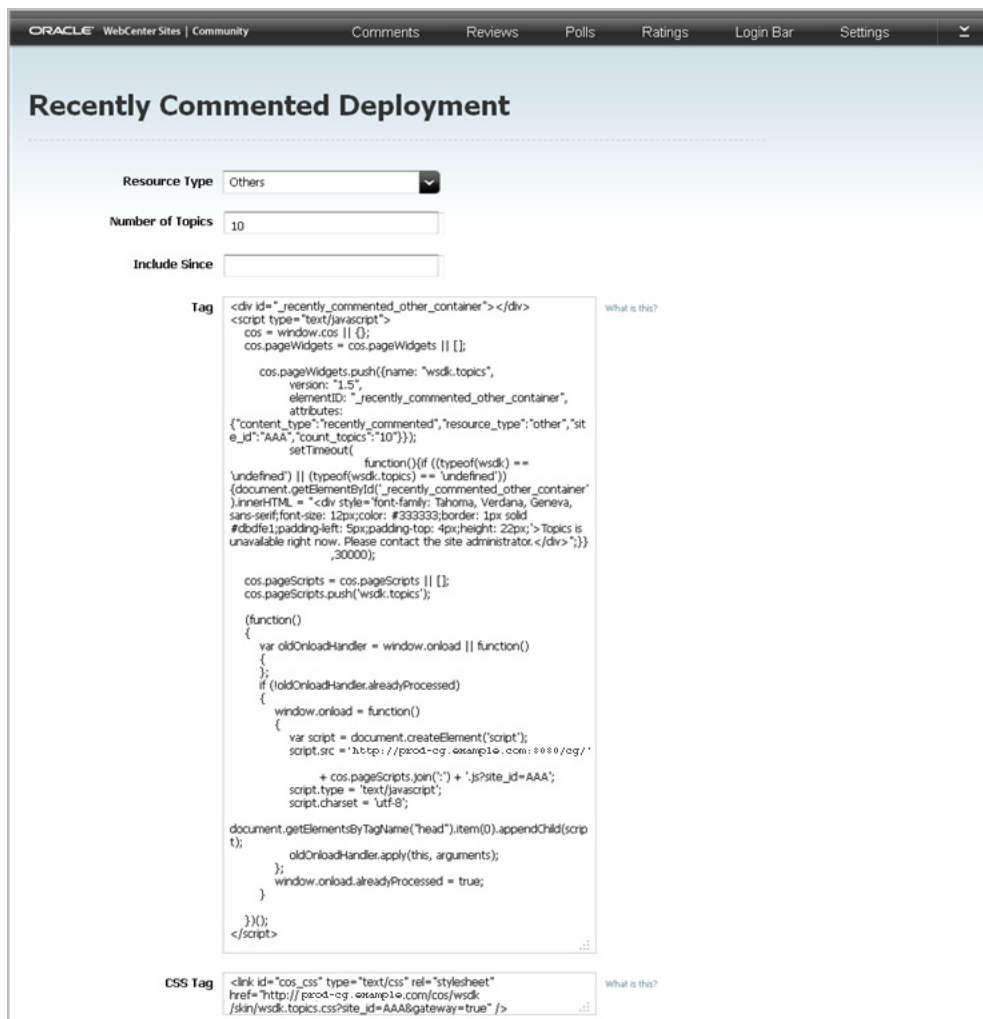
Table 25–10   Customizing and Deploying the Recently Commented Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Recently Commented widget is deployed, it lists the recently commented topics of a certain type (for example Article) on which a Comments widget assigned to the specified resource type is deployed. If the deployed Comments widgets are not assigned a resource type, select **Others**. **Default Value: Others** **Note:** The current category file (see Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) to be included in the list (for example, enter 5 to list the five topics to which site visitors have recently posted comments). **Default Value:** 10
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Recently Commented widget lists only the web pages whose comments were posted on or after the specified date. This allows you to avoid displaying outdated pages and comments. **Note:** If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

25.4.3.5 Custom Most Commented Widget Tag's Deployment Screen

The screen in Figure 25–12 is used to define custom values for a particular instance of the Most Commented widget tag, which can then be deployed on web pages.

Figure 25–12   'Most Commented Deployment' Screen
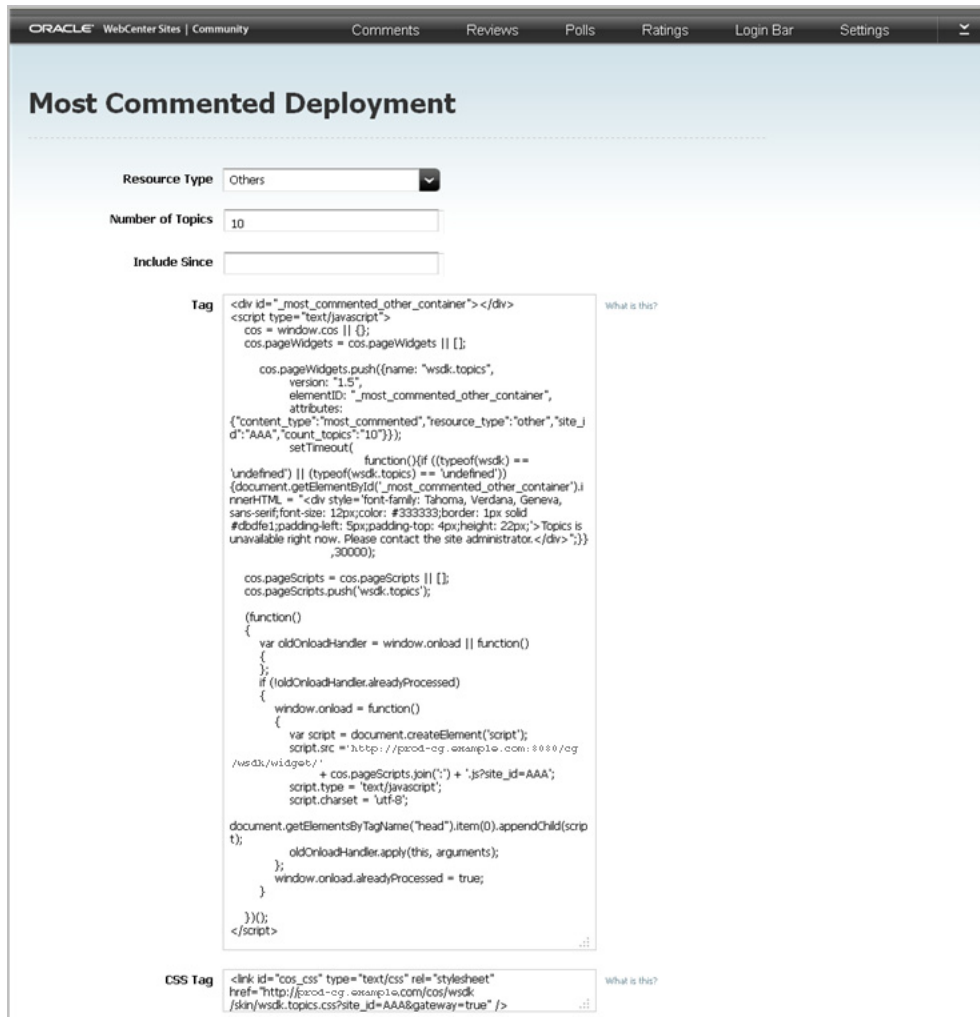
Table 25–11   Customizing and Deploying the Most Commented Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Most Commented widget tag is deployed, it lists the most popular topics of a certain type (for example Article) on which a Comments widget assigned to the specified resource type is deployed. If the deployed Comments widgets are not assigned a resource type, select **Others**.
	Default Value: Others
	Note: The current category file (see Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) to be included in the list (for example, enter 5 to list the five topics to which site visitors frequently post comments).
	Default Value: 10

Table 25–11   (Cont.) Customizing and Deploying the Most Commented Widget Tag

Field	Description
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Most Commented widget lists only the web pages whose comments were posted on or after the specified date. This allows you to avoid displaying outdated pages and comments.
	Note: If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

26

Working with the Reviews Widgets

This chapter provides a quick reference for moderating the reviews posted to your site by visitors, configuring the visitor permissions and appearance settings for the Reviews widget, and deploying the Reviews widget (and all related widgets) to a web page with either dynamic (default) or custom settings.

This chapter contains the following sections:

- Section 26.1, "Overview"
- Section 26.2, "Moderating Reviews"
- Section 26.3, "Reconfiguring the Reviews Widget's Default Settings"
- Section 26.4, "Deploying the Reviews Widget Tags"

26.1 Overview

Figure 26–1   Reviews Menu

The **Reviews** menu (shown in Figure 26–1) is used to work with the Reviews widget and all of its related widgets (Reviews Summary, Links to Topics, Reviews Average Rating, Top Ranked Reviews, Recently Reviewed, and Most Reviewed). The Reviews menu provides you with options to moderate the reviews that visitors post to the pages of your website, configure visitor permissions and appearance settings for the Reviews widget, and deploy the Reviews widget and all related widgets (with either default or custom settings) to a web page.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In."

26.2 Moderating Reviews

This section is for users assigned the `Moderator` role. Moderators can access and moderate the reviews posted to the website in the following ways:

- Moderating All Reviews

- Moderating Reviews by Topic

- Moderating Reviews by User

26.2.1 Moderating All Reviews

To access the "All Reviews" screen (shown in Figure 26–2), select **Reviews** from the menu bar, then select **Moderate,** and then select **All Reviews**. The "All Reviews" screen is used to moderate all reviews posted to the pages of your website. The reviews are listed in the order they were posted (most recent to least recent). You can sort the reviews in this list by either the visitor who posted the review or the date the review was posted.

Figure 26–2   'All Reviews' Screen
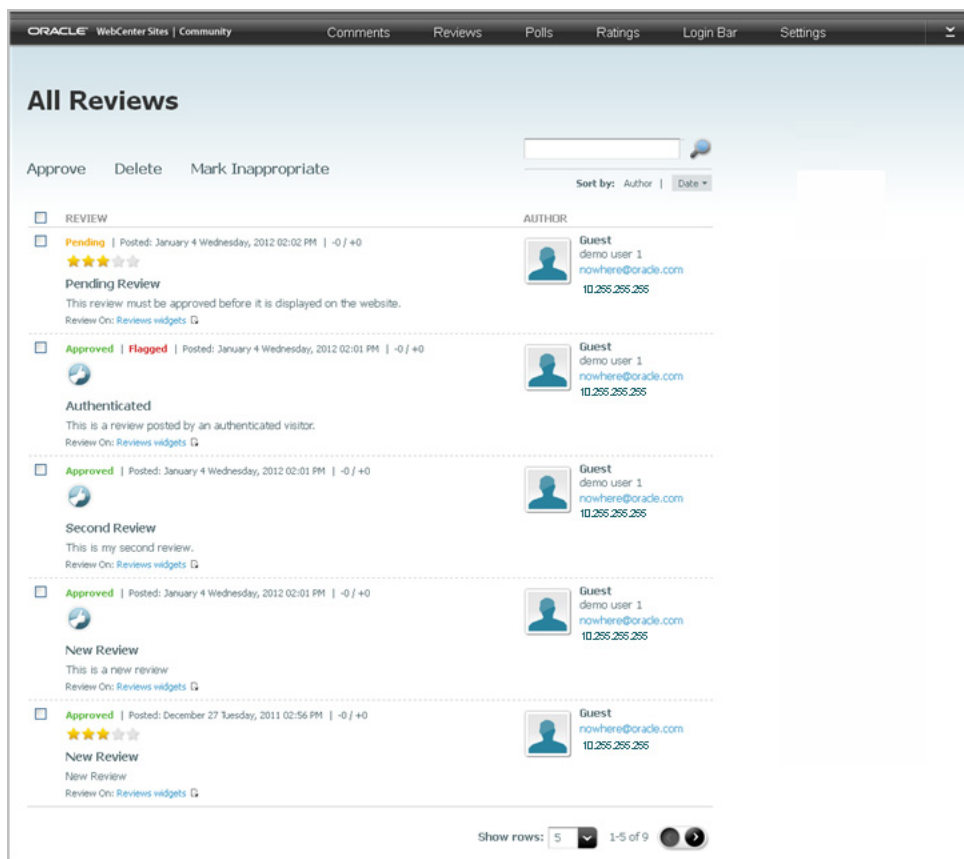
Table 26–1   Moderating All Reviews

Action	Instructions
Approve visitors' reviews	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to the review you wish to approve.
	3. In the menu that appears, select **Approve**.
	The approved review is displayed on the website.

Table 26–1   (Cont.) Moderating All Reviews

Action	Instructions
Delete visitors' reviews	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to the review you wish to delete.
	3. In the menu that appears, select **Delete**.
	4. In the confirmation box, click **OK**.
	The review is removed from the Community interface and from the web page to which it was posted.
Mark a review as inappropriate	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to the review that contains inappropriate or inaccurate content.
	3. In the menu that appears, select **Mark Inappropriate**.
	The status of the review changes to **Inappropriate** and the review is not displayed on the web page. Marking the review as inappropriate indicates to other moderators that the review must be modified before being displayed on the website.
	Note: Reviews can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Modify a review	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to the review you wish to modify.
	3. In the menu that appears, select **Edit**.
	The "Edit Review" screen is displayed.
	1. In the "Review" field, make the desired changes to the content.
	2. Click **Save**.
	The modified review is displayed in the Community interface and on the web page to which it was posted.
	Note: If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the review you modified to display it on the web page.
Add an authenticated visitor to the "Visitor Whitelist"	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to a review posted by the authenticated visitor you wish to add to the whitelist.
	3. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."

Table 26–1   (Cont.) Moderating All Reviews

Action	Instructions
Add a visitor to the "Visitor Blacklist"	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. Point to a review posted by the visitor you wish to add to the blacklist.
	3. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the "Visitor Blacklist," see Section 30.2.3, "Working with the Visitor Blacklist Screen."
Search for a review containing specific content	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. In the "Search" field, enter the criteria you wish to search for.
	3. Click the **magnifying glass** icon.
	Only reviews containing the specified search criteria are listed in the "All Reviews" screen.
Identify a flagged review	A review that is flagged on the website will appear in the "All Reviews" screen with **Flagged** posted next to its **Approved** status.
View a topic on the website	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. In the list of reviews, navigate to the review that is posted to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Reviews widget, and the reviews visitors posted to the page.
View all reviews posted by a specific visitor	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. In the list of reviews, navigate to the review that is posted by the desired authenticated visitor.
	3. Click the visitor's name.
	The "User Reviews" screen opens and displays only the reviews posted by the selected visitor.
	Note: For information about moderating reviews by user, see Section 26.2.3, "Moderating Reviews by User".
View all reviews posted to a specific topic	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **All Reviews**.
	2. In the list of reviews, navigate to the review that is posted to the desired topic.
	3. Click the name of the topic.
	The "All Reviews" screen opens and displays only the reviews posted to the selected topic.
	Note: For information about moderating reviews by topic, see Section 26.2.2, "Moderating Reviews by Topic".

26.2.2 Moderating Reviews by Topic

To access the "Reviews by Topic" screen, select **Reviews** from the menu bar, then select **Moderate**, and then select **Reviews by Topic**. The "Reviews by Topic" screen is used to sort all reviews that have been posted to the pages of your website by the title of the topic (web page) to which the reviews are posted. The average rating given to each topic is listed in the Average Rating column, located to the right of the corresponding topic. When you select the title of a topic from this screen, the All Reviews screen opens and displays only the reviews posted to that topic (as shown in Figure 26–3).

Figure 26–3   'Reviews by Topic' Screen

Table 26–2   Moderating Reviews by Topic

Action	Instructions
Filter topics by category	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Filter" panel, select the checkbox(es) of the desired resource type(s).
	The web pages (topics) with Reviews widgets of the selected resource type(s) are the only web pages listed in the "Reviews by Topic" screen.
	3. Select the name of the topic whose reviews you wish to view.
	The "All Reviews" screen opens and displays only the reviews posted to the topic you selected.
	Note: The resource types (topic types) available in the "Filter" panel are dynamically modified by the current category file (Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings"). "Others" refers to Reviews widgets (and topics) that do not belong to a resource type.
Approve visitors' reviews	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to moderate.
	3. In the "All Reviews" screen for the topic you selected, point to the review you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved review is displayed on the website.
Delete visitors' reviews	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the Reviews by Topic screen, select the topic whose reviews you wish to moderate.
	3. In the All Reviews screen for the topic you selected, point to the review you wish to delete.
	4. In the menu that appears, select **Delete**.
	5. In the confirmation box, click **OK**.
	The review is removed from the Community interface and from the web page to which it was posted.
Mark a review as inappropriate	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to moderate.
	3. In the "All Reviews" screen for the topic you selected, point to the review that contains inappropriate or inaccurate content.
	4. In the menu that appears, select **Mark Inappropriate**.
	The status of the review changes to **Inappropriate** and the review is not displayed on the web page. Marking the review as inappropriate indicates to other moderators that the review must be modified before being displayed on the website.
	Note: Reviews can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."

Table 26–2   (Cont.) Moderating Reviews by Topic

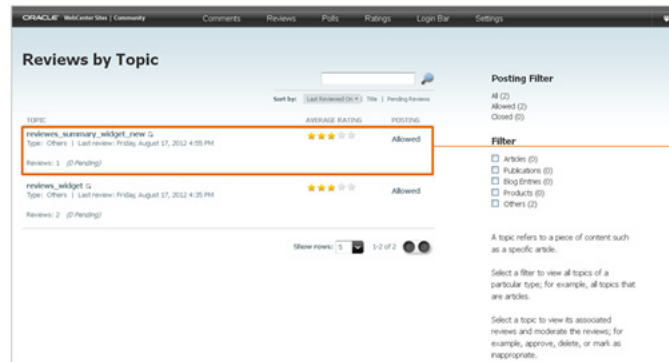| Action	Instructions
Modify a review	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to moderate.
	3. In the "All Reviews" screen for the topic you selected, point to the review you wish to modify.
	4. In the menu that appears, select **Edit**.
	The "Edit Review" screen is displayed.
	1. In the "Review" field, make the desired changes to the content.
	2. Click **Save**.
	The modified review is displayed in the Community interface and on the web page to which it was posted.
	Note: If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the review you modified to display it on the web page.
Add an authenticated visitor to the "Visitor Whitelist"	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to moderate.
	3. In the "All Reviews" screen for the topic you selected, point to a review posted by the authenticated visitor you wish to add to the whitelist.
	4. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the Visitor Whitelist, see Section 30.2.4, "Working with the Visitor Whitelist Screen."
Add a visitor to the "Visitor Blacklist"	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to moderate.
	3. In the "All Reviews" screen for the topic you selected, point to a review posted by the visitor you wish to add to the blacklist.
	4. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."
Search for a specific topic	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Search" field, enter the title of the topic you wish to search for.
	3. Click the **magnifying glass** icon.
	Only topics containing the requested search criteria are listed in the "Reviews by Topic" screen.

Table 26–2   (Cont.) Moderating Reviews by Topic

Action	Instructions
Enable or disable the reviews widget deployed on a given topic (web page)	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the list of topics, point to the topic whose reviews widget you wish to either enable or disable.
	Note: You cannot enable a topic's Reviews widget if one of the following is true: The Reviews widget was closed automatically due to the settings in the "Reviewing Auto Disable" section of the "Reviews Appearance" screen, or the Reviews widget was deployed with a "Post Status" of **Closed** (set from the "Reviews Deployment" screen).
	3. Enable or disable the reviews widget. If you wish to allow visitors to post reviews to the selected topic, in the context menu select **Allow Posting**. If you wish to disable the reviews widget deployed on a selected topic, in the context menu select **Close Posting**.
	If you selected **Allow Posting**, visitors can post reviews to the selected topic. If you selected **Close Posting**, visitors cannot post reviews to the selected topic.
	Note: You can use the "Posting Filter" to filter the topics displayed in the "Reviews by Topic" list by the status of the reviews widget deployed on the topic. For example, if you select **Allowed** in the "Posting Filter" section, then only topics that allow visitor to post reviews will be displayed in the list and vice versa.
Identify a flagged review	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, select the topic whose reviews you wish to view.
	3. In the list of reviews, identify any flagged reviews.
	A review that is flagged on the website will appear in the list of reviews with **Flagged** posted next to its **Approved** status.
View a topic on the website	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, navigate to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Reviews widget, and the reviews visitors posted to the page.
View all reviews posted by a specific visitor	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by Topic**.
	2. In the "Reviews by Topic" screen, navigate to and click the name of the topic to which the desired visitor posted a review.
	3. In the "All Reviews" screen for the topic you selected, navigate to the review posted by the desired visitor and click the visitor's name (located to the right of the visitor's review).
	The "User Reviews" screen opens and displays all of the reviews posted by the selected visitor.
	Note: For more information about moderating reviews by user, see Section 26.2.3, "Moderating Reviews by User."

26.2.3 Moderating Reviews by User

The "Reviews by User" screen is used to sort all posted reviews by the names of the visitors who posted them. When you select a visitor's name in this screen, the User

Reviews screen opens and displays the reviews the selected visitor posted along with the visitor's user name, profile picture, and e-mail address (if available), as shown in Figure 26–4.

Figure 26–4   'Reviews by User' Screen
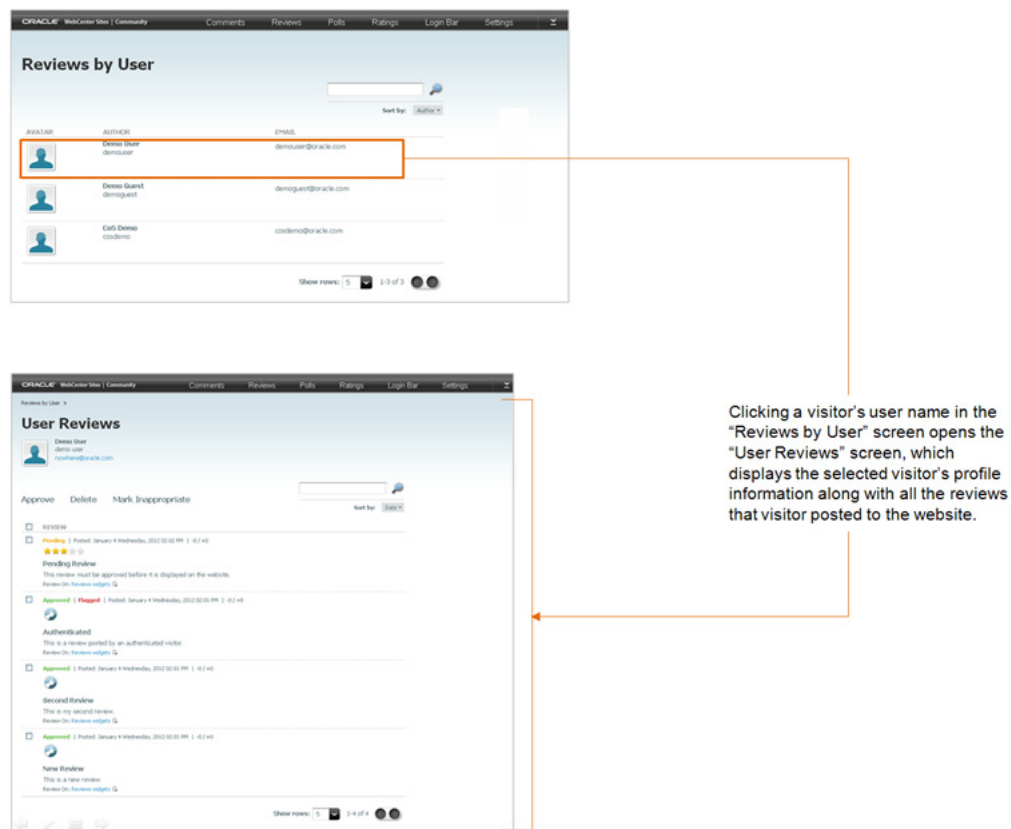
Table 26–3   Moderating Reviews by User

Action	Instructions
Approve visitors' reviews	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to moderate.
	3. In the "User Reviews" screen, point to the review you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved review is displayed on the website.

Table 26–3   (Cont.) Moderating Reviews by User

Action	Instructions
Delete visitors' reviews	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**. 2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to moderate. 3. In the "User Reviews" screen, point to the review you wish to delete. 4. In the menu that appears, select **Delete**. 5. In the confirmation box, click **OK**. The review is removed from the Community interface and from the web page to which it was posted.
Mark a review as inappropriate	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**. 2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to moderate. 3. In the "User Reviews" screen, point to the review that contains inappropriate or inaccurate content. 4. In the menu that appears, select **Mark Inappropriate**. The status of the review changes to **Inappropriate**. Marking the review as inappropriate indicates to other moderators that the review must by modified before being displayed on the website. **Note:** Reviews can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Modify a review	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**. 2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to moderate. 3. In the "User Reviews" screen, point to the review you wish to modify. 4. In the menu that appears, select **Edit**. The "Edit Review" screen is displayed. 5. In the "Review" field, make the desired changes to the content. 6. Click **Save**. The modified review is displayed in the Community interface and on the web page to which it was posted. **Note:** If manual moderation is enabled (Section 30.2.5, "Working with the Moderation Screen"), manually approve the review to display it on the web page.

Table 26–3   (Cont.) Moderating Reviews by User

Action	Instructions
Add an authenticated visitor to the "Visitor Whitelist"	If you know which authenticated visitor you want to add to the whitelist, do the following:
	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, point to the visitor's name.
	3. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	If you wish to view the reviews posted by the visitor before adding that visitor to the whitelist, do the following:
	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to view.
	3. In the "User Reviews" screen, point to any of the reviews displayed in the list.
	4. In the menu that appears, select **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the Visitor Whitelist, see Section 30.2.4, "Working with the Visitor Whitelist Screen."
Add an authenticated visitor to the "Visitor Blacklist"	If you know which visitor you want to add to the blacklist, do the following:
	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, point to the visitor's name.
	3. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" screen opens, and the visitor's name is displayed in the list of blacklisted visitors.
	If you wish to view the reviews posted by the visitor before adding the visitor to the blacklist, do the following:
	1. In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to view.
	3. In the "User Reviews" screen, point to any of the reviews displayed in the list.
	4. In the menu that appears, select **Blacklist Author**.
	The "Visitor Blacklist" screen opens, and the visitor's name is displayed in the list of blacklisted visitors.
	Note: For more information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

Table 26–3 (Cont.) Moderating Reviews by User

Action	Instructions
Search for a specific visitor	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Search" field, enter the name of the visitor you wish to search for.
	3. Click the **magnifying glass** icon.
	Only visitor names that match the specified search criteria are listed in the "Reviews by User" screen.
Identify a flagged review	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, select the name of the visitor whose reviews you wish to view.
	3. In the "User Reviews" screen, identify any flagged reviews:
	A review that is flagged on the website will appear in the list of reviews with **Flagged** posted next to its **Approved** status.
View a topic on the website	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **Reviews by User**.
	2. In the "Reviews by User" screen, select the name of the visitor whose review is posted to the desired topic.
	3. In the "User Reviews" screen, navigate to the desired review.
	4. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed Reviews widget, and the reviews visitors posted to the page.
View all the reviews posted to a specific topic	**1.** In the menu bar, select **Reviews**, then select **Moderate**, and then select **Review by User**.
	2. In the "Reviews by User" screen, select the name of a visitor who posted a review to the desired topic.
	3. In the "User Reviews" screen, navigate to the review posted to the desired topic, and click the name of the topic (located under the visitor's review).
	The "All Reviews" screen for the topic you selected opens and displays all of the reviews posted to that topic.
	Note: For more information about moderating reviews by topic, see Section 26.2.2, "Moderating Reviews by Topic."

26.3 Reconfiguring the Reviews Widget's Default Settings

Default settings are a widget's saved appearance and permission settings. Users assigned the `Designer` role can modify the default appearance of the Reviews widget by selecting **Reviews**, **Configure**, and then **Appearance** in the menu bar. Users assigned the `Moderator` role can reconfigure the default reviewing permissions by selecting **Reviews**, **Configure**, and then **Permissions** in the menu bar. Once the permissions and appearance settings are saved, the system dynamically updates the Reviews widget's default tags in the Community interface and on pages where tags with default settings are deployed.

You can reconfigure the default settings of the Reviews widget in the following ways:

- Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings"
- Section 26.3.2, "Reconfiguring the Reviews Widgets' Permissions Settings"

26.3.1 Reconfiguring the Reviews Widgets' Appearance Settings

To access the "Reviews Appearance" screen (shown in Figure 26–5), select **Reviews** from the menu bar, then select **Configure**, and then select **Appearance**. This screen is used to reconfigure the Reviews widget's color schema, sort order, and other display properties.

Figure 26–5   'Reviews Appearance' Screen

Table 26–4   Reconfiguring the Reviews Widget's Appearance Settings

Section	Field	Description
General	Show Reviews	Select either **Display** or **Do not Display** to specify whether approved reviews are displayed to site visitors.
General	Review Type	Select the type of review your deployment supports. Select either: ■ **Full review** – Supports a review field with a title field and rating capabilities which allows visitors to write a review, include a title for their review, and submit a rating with their review. ■ **Brief review** – Supports a review field with rating capabilities which allows visitors to write a review and submit a rating with their review.
General	Pagination	Specify the number of approved reviews that will be displayed on a given page at one time.
General	Display Order	Select one of the following to specify the order in which approved reviews will be displayed on a given page: ■ **Newest at the top** – Displays the most recently posted reviews at the top of the list of reviews. ■ **Oldest at the top** – Displays the oldest reviews at the top of the list of reviews. ■ **Least ranked at the top** – Displays the reviews that site visitors rank the least (or have not ranked) at the top of the list of reviews. ■ **Most ranked at the top** – Displays the reviews that site visitors frequently rank at the top of the list of reviews.
General	Review Submit Box	Specify whether the review field will be displayed **At the top** or **At the bottom** of the list of reviews on a given page.
General	Review Ranking	Specify whether site visitors can rank individual reviews as **Helpful** or **Not Helpful**. Select one of the following: ■ **Enabled for all visitors –** All visitors (authenticated and anonymous) can rank the reviews posted to a web page. ■ **Enabled for registered visitors –** Only authenticated visitors can rank the reviews posted to a web page. ■ **Disabled** – Individual reviews cannot be ranked.
General	Skin	Select **Default** to use the default color schema for the Reviews widget, or select **Custom** to upload your own CSS file.
General	Upload Custom CSS	If you selected the **Custom** option in the Skin field, use the **Browse** button to select a cascading style sheet (CSS) that will control the appearance of the Reviews widget.

Table 26–4   (Cont.) Reconfiguring the Reviews Widget's Appearance Settings

Section	Field	Description
General	Login Bar Required	Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with the Reviews widget tag.
		Note: If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Reviews widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").
Reviewing Auto Disable	Max Number of Reviews Allowed	Use the drop-down menu to select the maximum number of reviews that can be posted to a given web page. Once the maximum number of reviews is reached, site visitors cannot post reviews to that particular web page.
		Note: You can also enter the maximum number of reviews that can be posted to a given web page (for example, to specify 50 as the maximum number of reviews, enter 50 into this field).
Reviewing Auto Disable	Accept Reviews Until	Use the drop-down menu to select the number of days reviews can be posted to a given web page. Once the specified number of days is reached, site visitors cannot post reviews to that particular web page.
		Note: You can also enter the maximum number of days reviews can be posted to a given web page (for example, to specify 30 as the maximum number of days reviews can be posted, enter 30 into this field).
Review Body	Max Length	Select either **450 characters** or **900 characters** to set the review field size.
Review Body	Type	Select the type of text that can be entered into the review field. Select either:
		■ **Plain text** – Visitors can only enter text into the review field.
		■ **HTML with blocked JS** – Visitors can enter text and basic HTML tags into the review field.
		■ **HTML and Media with blocked JS** – Visitors can enter text, basic HTML tags, videos, and so on into the review field.
Help and Disclaimer	Show Help Text	Select either **Display** or **Do not display** to specify whether help text will be displayed to visitors.
Help and Disclaimer	Help Text	If you selected **Display** in the Show Help Text field, enter the help text you wish to display to visitors. When the Reviews widget is deployed, the help text is displayed above the reviews submit box.
		Note: This field supports plain text and basic HTML tags. You can use HTML tags to control the appearance of your help text.
Help and Disclaimer	Show Disclaimer Text	Select either **Display** or **Do not display** to specify whether a disclaimer will be displayed to visitors.

Table 26–4 (Cont.) Reconfiguring the Reviews Widget's Appearance Settings

Section	Field	Description
Help and Disclaimer	Disclaimer Text	If you selected **Display** in the Show Disclaimer Text field, enter the disclaimer text you wish to display to visitors. When the Reviews widget is deployed, the disclaimer is displayed beneath the reviews submit box. **Note:** This field supports plain text and basic HTML tags. You can use HTML tags to control the appearance of your disclaimer.
Topic Categories	Upload Categories	Use the **Browse** button to upload the desired category file, which will dynamically modify the resource types available from: ■ The Resource Type field in the Reviews widget tag's custom deployment screen (Section 26.4.3.1, "Custom Reviews Widget Tag's Deployment Screen"). ■ The Resource Type field in the Top Ranked Reviews (Section 26.4.3.5, "Custom Top Ranked Reviews Widget Tag's Deployment Screen"), Recently Reviewed (Section 26.4.3.6, "Custom Recently Reviewed Widget Tag's Deployment Screen"), and Most Reviewed (Section 26.4.3.7, "Custom Most Reviewed Widget Tag's Deployment Screen") widget tag deployment screens. ■ The Reviews by Topic screen's Filter panel (Section 26.2.2, "Moderating Reviews by Topic"). **Note:** The category file must be in `.txt` format, the resource types listed in the file must be in a `key=value` structure, only an English alphanumeric string is permitted for the `key` in the `key=value` pairs, each resource type listed in the file must be on its own line, and the size of the file you are uploading can be no more than 100MB.

26.3.2 Reconfiguring the Reviews Widgets' Permissions Settings

To access the "Reviewer Permissions" screen (shown in Figure 26–6), select **Reviews** from the menu bar, then select **Configure**, and then select **Permissions**. This screen is used to display or hide the review field and set visitors' permissions to review.

Figure 26–6   'Reviewer Permissions' Screen

Table 26–5   Reconfiguring Reviewing Permissions for Site Visitors

Section	Field
Reviewing Enabled	■ **Yes** configures the widget to display a review field.
	■ **No** hides the review field, but displays only approved reviews, if the widget was previously enabled.
Who Can Review?	Available only if the widget is configured to display a review field:
	■ **Anonymous users can review** grants reviewing permissions to all site visitors.
	Available only if anonymous visitors can review:
	User must enter a name requires anonymous visitors to specify a name when posting a review.
	User must enter an email address requires anonymous visitors to specify an email address when posting a review.
	User must enter a verification code requires anonymous visitors to enter the letters and/or numbers of a CAPTCHA image before they can post a review.
	Note: By default, the **User must enter a verification code** option is greyed out (not available). For information about enabling this option, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.
	Restrict user to one review per topic allows visitors to post only one review to a given web page (topic).
	■ **Only authenticated users can review** grants reviewing permissions only to authenticated visitors.
	User can modify and delete his reviews allows authenticated visitors to modify and delete the reviews they post.
	Restrict user to one review per topic allows authenticated visitors to post only one review to a given web page (topic).

26.4 Deploying the Reviews Widget Tags

This section is for users assigned the `Designer` role. Designers can deploy the Reviews widget tag and all of its related widget tags with either default or custom settings by selecting **Reviews**, **Deploy**, and then the *name of the widget tag you wish to deploy* in the menu bar. Table 26–6 lists the reviews widget tags and indicates which type of deployment each tag supports.

Table 26–6   Deploying the Reviews Widget Tags

Widget Tag	Deploy with Default Settings	Configure and Deploy Custom Settings
Reviews	Yes	Yes
Reviews Summary	No	Yes
Links to Topics	No	Yes
Average Rating	No	Yes
Top Ranked Reviews	Yes	Yes
Recently Reviewed	Yes	Yes
Most Reviewed	Yes	Yes

This section contains the following topics:

- Section 26.4.1, "Deploying a Default Reviews Widget Tag"

- Section 26.4.2, "Deploying Custom Reviews Widget Tags"

- Section 26.4.3, "Custom Widget Tag Deployment Screens"

26.4.1 Deploying a Default Reviews Widget Tag

Several types of reviews widgets can be deployed with default settings: Reviews, Top Ranked Reviews, Recently Reviewed, and Most Reviewed. The default settings for the Reviews widget are its saved settings, which are configured in the Permissions screen (select **Reviews**, **Configure**, and then **Permissions**) and Appearance screen (select **Reviews**, **Configure**, and then **Appearance**). The default settings for all other review related widgets are configured out-of-the-box and cannot be reconfigured in the Community interface. Each reviews widget has its own deployment screen, which displays the widget tag. The default settings are used as property values in the widget tag.

To deploy default reviews widget tags

1. In the menu bar, select **Reviews**, **Deploy**, and then select the *name of the widget tag you wish to deploy*:

   - **Reviews** – to deploy the Reviews widget tag. If reviewing is enabled (in the "Reviewer Permissions" screen), the Reviews widget displays a review field. If displaying reviews is enabled (in the Reviews Appearance screen), then a list of site visitors' reviews is displayed on the web page.

> **Note:** If any of the following deployment scenarios are true, you will have to customize the Reviews widget by specifying a resource ID:
>
> - You wish to link the Links to Topics widget to a Reviews widget.
>
> - You want to deploy the Reviews Summary widget on a web page different from the one on which the desired Reviews widget is deployed.
>
> - You want the Reviews Average Rating widget to display the average rating of the web page on which a Reviews widget tag is deployed.
>
> - You want to deploy more than one Reviews widget tag on the same page.
>
> For more information, see the description for the Resource ID field in Table 26–7.

- **Top Ranked Topics** – to deploy the Top Ranked Reviews widget tag. When deployed, this widget lists and provides links to the website's highest rated web pages (topics).

> **Note:** By default, the Top Ranked Reviews widget lists topics that have an associated Reviews widget of resource type "Others." To configure the Top Ranked Reviews widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Recently Reviewed** – to deploy the Recently Reviewed widget tag. When deployed, this widget displays a list of the top ten web pages (topics) to which site visitors have recently posted reviews.

> **Note:** By default, the Recently Reviewed widget lists topics that have an associated Reviews widget of resource type Others. To configure the Recently Reviewed widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Most Reviewed** – to deploy the Most Reviewed widget tag. When deployed, this widget displays a list of the top ten web pages (topics) to which site visitors frequently post reviews.

> **Note:** By default, the Most Reviewed widget lists topics that have an associated Reviews widget of resource type Others. To configure the Most Reviewed widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

The deployment screen for each widget looks similar to the Reviews Deployment screen, shown in Figure 26–7:

Figure 26–7 'Reviews Deployment' Screen: Site Settings vs. Custom Settings
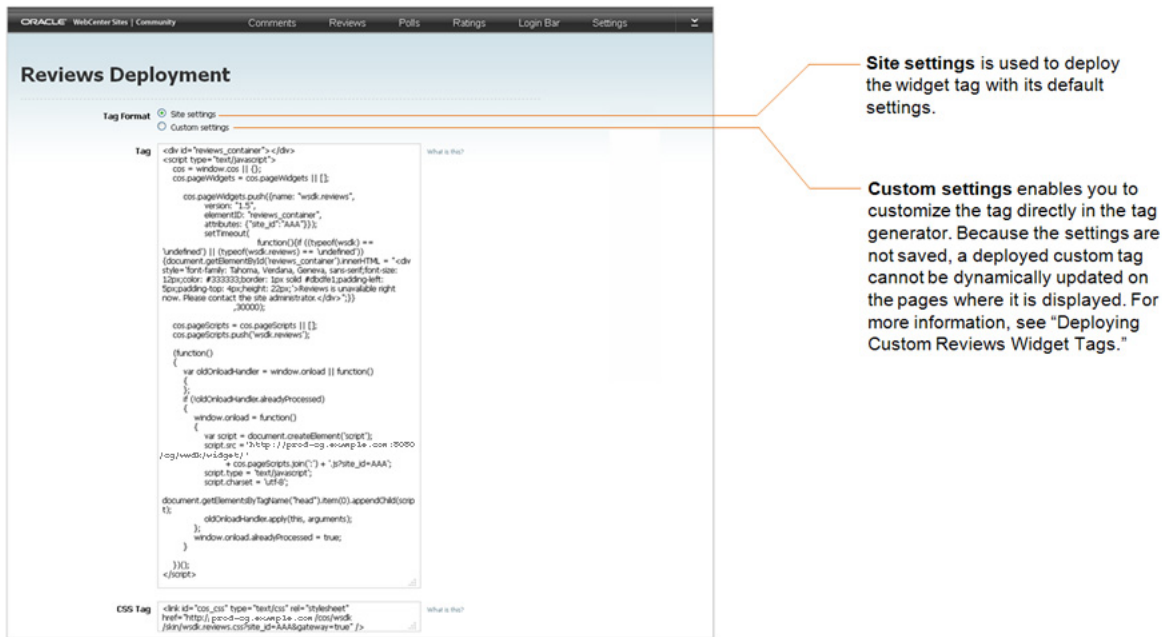
1. In the "Tag Format" field, make sure **Site settings** is selected.

2. Deploy the widget tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For detailed instructions, see steps 3 – 7 in Section 24.3, "Next Steps."

26.4.1.1 Hiding the Default Reviews Widget

If you want to hide a default Reviews widget that is displayed on various web pages, instead of accessing the template's source code, you (depending on your role in the Community application) can use the Reviews widget's Permissions and Appearance screens.

1. If you are a moderator, hide the review field:

   a. In the menu bar, select **Reviews**, then select **Configure**, and then select **Permissions**.

   b. In the "Reviewing Enabled" field, select **No**.

   c. Click **Save**.

   The review field is now hidden from site visitors.

2. If you are a designer, hide the list of reviews:

   a. In the menu bar, select **Reviews**, then select **Configure**, and then select **Appearance**.

   b. In the "Show Reviews" field, select **Do not display**.

   c. Click **Save**.

The list of reviews is now hidden from site visitors.

26.4.2 Deploying Custom Reviews Widget Tags

You can customize any widget tag related to reviewing functionality (except Links to Topics) by setting its properties using the tag generator in the widget's Deployment screen. Each time a widget tag is customized, it must be redeployed because custom values cannot be saved in the Community interface, instead they are saved only in that particular instance of the widget tag.

To configure and deploy custom reviews widget tags

1. In the menu bar, select **Reviews**, then select **Deploy**, and then select the *name of the widget tag you wish to customize and deploy*:

   - **Reviews** – to customize and deploy the Reviews widget tag: that is, (1) Configure the Reviews widget tag with a unique identifier and resource type so that it can be referred to by other reviewing related widgets for its content, such as the number of reviews and the average rating. (2) Specify the web page (topic title and URL) on which the Reviews widget tag is deployed. (3) Reconfigure certain properties that were set as defaults in the tag's Permissions (select **Reviews**, **Configure**, and then select **Permissions**) screen and Appearance (select **Reviews**, **Configure**, and then select **Appearance**) screen.

   - **Reviews Summary** – to customize and deploy the Reviews Summary widget tag; that is, specify the resource ID of a Reviews widget in the "Reviews Summary Deployment" screen. When deployed, the Reviews Summary widget displays short, summarized information about the number of reviews posted to the web page on which the specified Reviews widget is deployed along with the date of the most recently posted review.

   - **Links to Topics** – to customize and deploy the Links to Topics widget tag; that is, specify the resource ID of a Reviews widget and, optionally, the resource URL of a web page to which you wish this widget to link. When deployed, the Links to Topics widget displays summarized information about the specified Reviews widget, such as the number of reviews posted to the web page (topic) on which that Reviews widget is deployed, along with a link to the desired web page (if you specified the URL of a web page in the Links to Topics widget tag).

     Note: You can configure this widget to display summarized information about and links to multiple Comments and/or Reviews widgets. For instructions, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

   - **Average Rating** – to customize and deploy the Reviews Average Rating widget tag: that is, for the Reviews Average Rating widget to display the average rating of a given topic (web page), the Reviews Average Rating widget must be configured to refer to the Reviews widget, deployed on the desired topic (web page), by its resource ID.

   - **Top Ranked Topics** – to customize and deploy the Top Ranked Reviews widget tag: that is, have the Top Ranked Reviews widget display the highest rated topics of a desired type (instead of topics of type "Others"). For example, topics of type "Article" are posted on a web page; each article has its own Reviews widget of resource type "Article." If the Top Ranked Reviews widget

is to list the highest rated topics of type "Article," it must be configured to refer to the Reviews widget by resource type.

> **Note:** To configure the Top Ranked Reviews widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Recently Reviewed** – to customize and deploy the Recently Reviewed widget tag: that is, have the Recently Reviewed widget display recently reviewed topics of a desired type (instead of topics of type "Others"). For example, topics of type "Article" are posted on a web page; each article has its own Reviews widget of resource type "Article." If the Recently Reviewed widget is to list the recently reviewed topics of type "Article," it must be configured to refer to the Reviews widget by resource type.

> **Note:** To configure the Recently Reviewed widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Most Reviewed** – to customize and deploy the Most Reviewed widget tag: that is, have the Most Reviewed widget display the most popular topics of a desired type (instead of topics of type "Others"). For example, topics of type "Article" are posted on a web page; each article has its own Reviews widget of resource type "Article." If the Most Reviewed widget is to list the most popular topics of type "Article," it must be configured to refer to the Reviews widget by resource type.

> **Note:** To configure the Most Reviewed widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

2. In the "Tag Format" field, select **Custom Settings**. Customize the desired widget tag by setting values for the available fields in the tag's custom deployment screen.

   For field definitions, see:

   - Section 26.4.3.1, "Custom Reviews Widget Tag's Deployment Screen"
   - Section 26.4.3.2, "Custom Reviews Summary Widget Tag's Deployment Screen"
   - Section 26.4.3.3, "Custom Links to Topics Widget Tag's Deployment Screen"
   - Section 26.4.3.4, "Custom Reviews Average Rating Widget Tag's Deployment Screen"
   - Section 26.4.3.5, "Custom Top Ranked Reviews Widget Tag's Deployment Screen"
   - Section 26.4.3.6, "Custom Recently Reviewed Widget Tag's Deployment Screen"

- Section 26.4.3.7, "Custom Most Reviewed Widget Tag's Deployment Screen"

3. Deploy the custom tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For instructions, see steps 3 – 7 in the Section 24.3, "Next Steps."

26.4.3 Custom Widget Tag Deployment Screens

Once you access a given widget's custom deployment screen, you can use the available fields to set custom (temporary) values for the widget tag. These values are not saved, except in the template to which you copy the customized instance of the tag. This section provides field definitions.

26.4.3.1 Custom Reviews Widget Tag's Deployment Screen

The screen shown in Figure 26–8 is used to define custom values for a particular instance of the Reviews widget tag, which can then be deployed on web pages.

Figure 26–8   'Reviews Deployment' Screen

> **Note:** The **Default** field value references the setting that is specified in the widget's "Permissions" or "Appearance" screen. If you choose a default setting for your custom tag, and you deploy the tag, that default setting will be dynamically updated if its value is modified and saved in the Community interface.

Table 26–7 Customizing and Deploying the Reviews Widget Tag

Field	Description
Review Type	Select the type of review structure your deployment supports. Select either: ■ **Brief review** – Supports a review field with rating capabilities, which allows visitors to write a review and submit a rating with their review. ■ **Full review** – Supports a review field with a title field and rating capabilities, which allows visitors to write a review, include a title for their review, and submit a rating with their review.
Rating	Determine whether the Reviews widget supports a binary rating (**Thumbs Up/Thumbs Down**) where visitors can specify whether they liked or disliked the topic, or a complex rating (**Stars**) where visitors can rate the topic by selecting a number of stars.
Resource ID	Enter a resource ID (unique identifier) for this instance of the Reviews widget tag. This resource ID can be used in other reviews widget tags (for example, the Reviews Summary widget tag) to refer to this instance of the Reviews widget. You can enter a maximum of 50 English alphanumeric characters into this field. **Note:** ■ This field is required only if you want to configure other reviews widget tags to refer to this Reviews widget's content (for example, the number of reviews posted to the web page). ■ If you wish to link the Links to Topics widget to this instance of the Reviews widget, you will have to note the URL of the web page on which this Reviews widget is deployed.
Resource Type	Select a resource type (topic type) for this instance of the Reviews widget tag. The resource type of a Reviews widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Reviews widget tag is deployed is associated with the default Others resource type. **Note:** The current category file (Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings") determines the resource types that are available to you.
Review Submit Box	Specify whether the review field will be displayed **At the top** or **At the bottom** of the list of reviews on a given page.
Display Order	Select one of the following to specify the order in which approved reviews will be displayed on a given page: ■ **Most ranked at the top** – Displays the reviews that site visitors rank the most at the top of the list of reviews. ■ **Oldest at the top** – Displays the oldest reviews at the top of the list of reviews. ■ **Newest at the top** – Displays the most recently posted reviews at the top of the list of reviews. ■ **Least ranked at the top** – Displays the reviews site visitors rank the least (or have not ranked) at the top of the list of reviews.

Table 26–7   (Cont.) Customizing and Deploying the Reviews Widget Tag

Field	Description
Review Ranking	Specify whether visitors can rank individual reviews as **Helpful** or **Not Helpful**. Select one of the following:
	■ **Enabled for all visitors** – All visitors (authenticated and anonymous) can rank the reviews posted to a web page.
	■ **Enabled for registered visitors** – Only authenticated visitors can rank the reviews posted to a web page.
	■ **Disabled** – Individual reviews cannot be ranked.
Resource Title	Enter the title of the web page (topic) on which the widget tag will be deployed.
Resource URL	Enter the URL of the web page on which the widget tag will be deployed.
Post Status	Select either **Open** or **Close** to specify whether site visitors can post reviews to the page on which this widget tag is deployed.
	Note: If you deploy the Reviews widget with a "Post Status" of **Close** on a web page (topic), you cannot enable reviewing on that web page (topic) from the "Reviews by Topic" screen.
Login Bar Required	Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with the Reviews widget tag.
	Note: If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Reviews widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

26.4.3.2 Custom Reviews Summary Widget Tag's Deployment Screen

The screen shown in Figure 26–9 is used to define custom values for a particular instance of the Reviews Summary widget tag, which can then be deployed on web pages.

Figure 26–9   'Reviews Summary Deployment' Screen

Table 26–8   Customizing and Deploying the Reviews Summary Widget Tag

Field	Description
Resource ID	Specify the resource ID (unique identifier) of a Reviews widget tag. When the Reviews Summary widget is deployed, it displays summarized information about the number of reviews posted to the web page on which the specified Reviews widget is deployed.
Show Last Review Date	Select **Yes** to display the most recent date a review was posted to a web page, or select **No** to display only the number of reviews posted to the page. **Default Value: No**

26.4.3.3 Custom Links to Topics Widget Tag's Deployment Screen

The screen shown in Figure 26–10 is used to define custom values for a particular instance of the Links to Topics widget tag, which can then be deployed on web pages.

Figure 26–10 'Links to Topics Deployment' Screen

Table 26–9   Customizing and Deploying the Links to Topics Widget Tag

Field	Description
Resource ID	This field is required. Specify the resource ID (unique identifier) of a Reviews widget tag. When the Links to Topics widget is deployed, it displays summarized information about the number of reviews posted to the web page on which the specified Reviews widget is deployed.

Table 26–9   (Cont.) Customizing and Deploying the Links to Topics Widget Tag

Field	Description
Resource URL	If you want the Links to Topics widget to redirect visitors to a certain web page when a visitor clicks the summarized information about a Reviews widget, specify the resource URL of the desired web page.
	Note: If you do not specify a resource URL, when a visitor clicks the summarized information about the specified Reviews widget, the Links to Topics widget redirects the visitor to the page on which the Reviews widget (specified in the **Resource ID** field) is deployed. If there are multiple Reviews widgets with the same resource ID deployed on the page, the Links to Topics widget redirects the visitor to the last active widget on that page.

26.4.3.4 Custom Reviews Average Rating Widget Tag's Deployment Screen

The screen shown in Figure 26–11 is used to define custom values for a particular instance of the Reviews Average Rating widget tag, which can then be deployed on web pages.

Figure 26–11   'Reviews Average Rating Deployment' Screen

Table 26–10   Customizing and Deploying the Average Rating Widget Tag

Field	Description
Resource ID	Specify the resource ID (unique identifier) of a Reviews widget tag. When this instance of the Reviews Average Rating widget is deployed, it displays the average rating of the web page on which the specified Reviews widget is deployed.

26.4.3.5 Custom Top Ranked Reviews Widget Tag's Deployment Screen

The screen shown in Figure 26–12 is used to define custom values for a particular instance of the Top Ranked Reviews widget tag, which can then be deployed on web pages.

Figure 26–12   'Top Ranked Reviews Deployment' Screen
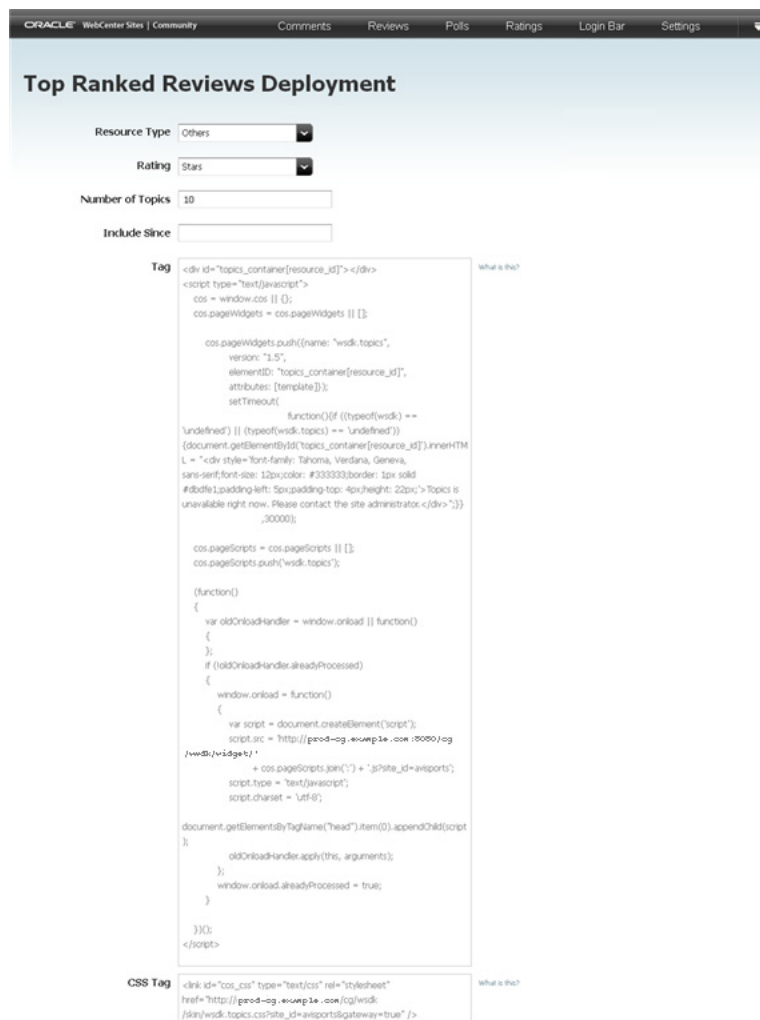
Table 26–11   Customizing and Deploying the Top Ranked Reviews Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Top Ranked Reviews widget is deployed, it lists the highest rated topics of a certain type (for example, Article) on which a Reviews widget assigned to the specified resource type is deployed. If the deployed Reviews widgets are not assigned a resource type, select **Others**. **Default Value: Others** **Note:** The current category file (Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings") determines the resource types that are available to you.
Rating	Select a type of ratings widget: **Stars** or **Thumbs Up/Down**. Only web pages on which a ratings widget of the specified type is deployed will be included in the list. **Default Value: Stars**
Number of Topics	Specify the number of web pages (topics) to be included in the list (for example, enter 5 to display a list of the five highest rated topics). **Default Value:** 10
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Top Ranked Reviews widget lists only the web pages whose reviews were posted on or after the specified date. This allows you to avoid displaying outdated pages and reviews. **Note:** If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

26.4.3.6 Custom Recently Reviewed Widget Tag's Deployment Screen

The screen shown in Figure 26–13 is used to define custom values for a particular instance of the Recently Reviewed widget tag, which can then be deployed on web pages.

Figure 26–13   'Recently Reviewed Deployment' Screen
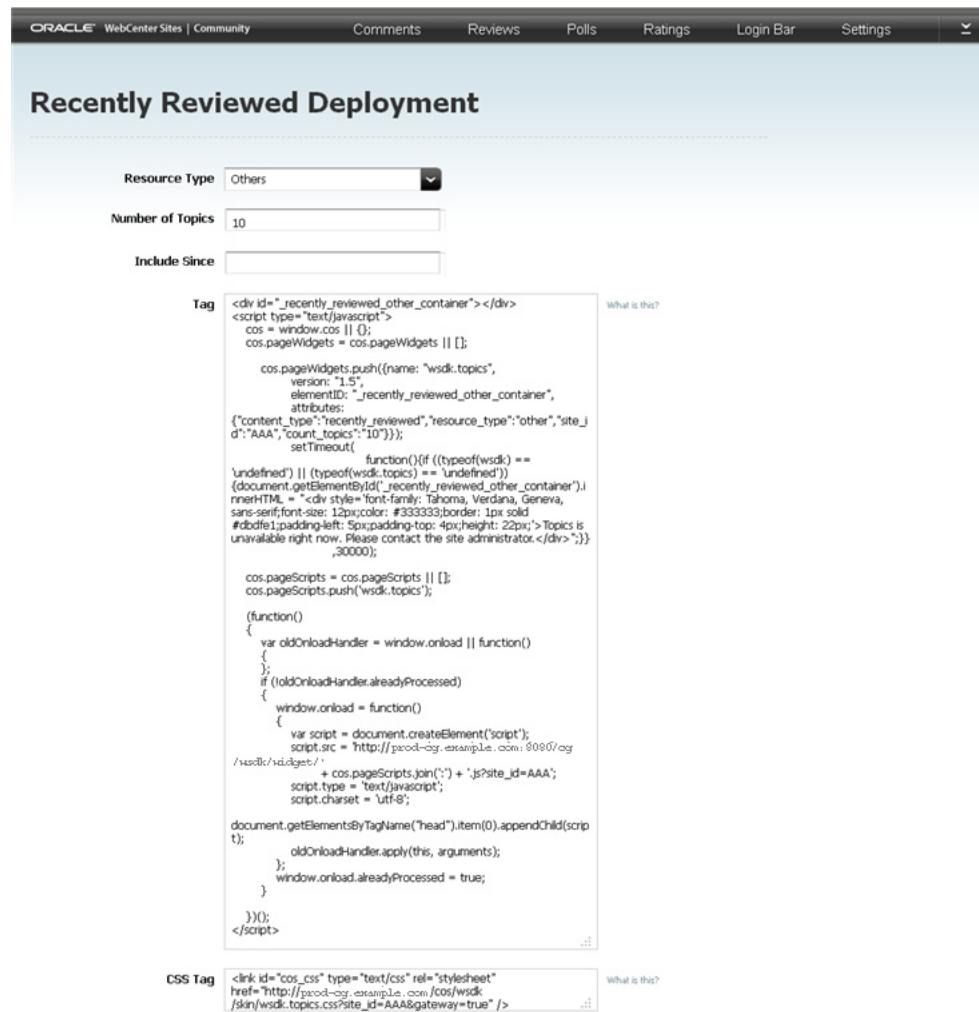
Table 26–12   Customizing and Deploying the Recently Reviewed Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Recently Reviewed widget is deployed, it lists the recently reviewed topics of a certain type (for example, Article) on which a Reviews widget assigned to the specified resource type is deployed. If the deployed Reviews widgets are not assigned a resource type, select **Others**. **Default Value: Others** **Note:** The current category file (Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) to be included in the list (for example, enter 5 to display the five most recently reviewed topics). **Default Value:** 10

Table 26–12   (Cont.) Customizing and Deploying the Recently Reviewed Widget Tag

Field	Description
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Recently Reviewed widget lists only the web pages whose reviews were posted on or after the specified date. This allows you to avoid displaying outdated pages and reviews.
	Note: If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

26.4.3.7 Custom Most Reviewed Widget Tag's Deployment Screen

The screen shown in Figure 26–14 is used to define custom values for a particular instance of the Most Reviewed widget tag, which can then be deployed on web pages.

Figure 26–14   'Most Reviewed Deployment' Screen

Table 26–13   Customizing and Deploying the Most Reviewed Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Most Reviewed widget is deployed, it lists the most reviewed topics of a certain type (for example, Article) on which a Reviews widget assigned to the specified resource type is deployed. If the deployed Reviews widgets are not assigned a resource type, select **Others**. **Default Value: Others** **Note:** The current category file (Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) to be included in this list (for example, enter 5 to list the five topics site visitors frequently review). **Default Value:** 10
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Most Reviewed widget lists only the web pages whose reviews were posted on or after the specified date. This enables you to avoid displaying outdated pages and reviews. **Note:** If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

27

Working with Ratings Widgets

This chapter provides a quick reference for moderating the ratings posted to your site by visitors, configuring visitors' rating permissions and the appearance of the ratings widgets, and deploying the ratings widgets with either default or custom settings to a web page.

This chapter contains the following sections:

- Section 27.1, "Overview"
- Section 27.2, "Moderating Ratings"
- Section 27.3, "Reconfiguring the Ratings Widget's Default Settings"
- Section 27.4, "Deploying the Ratings Widgets"

27.1 Overview

Figure 27–1   Ratings Menu
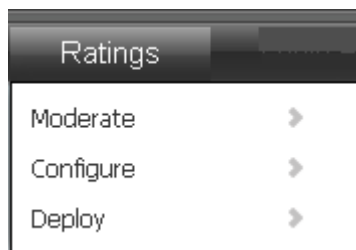
The **Ratings** menu (shown in Figure 27–1) is used to work with all widgets related to rating functionality (Stars Ratings, Thumbs Up/Down Ratings, Like It Ratings, Recommend Ratings, Ratings Average Rating, Recently Rated, and Most Rated). The "Ratings" menu provides you with options to moderate the ratings that visitors post to web pages, configure visitor permissions and appearance settings for the ratings widgets, and deploy ratings widgets (with either default or custom settings) to web pages.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In."

27.2 Moderating Ratings

This section is for moderators. You can access and moderate the ratings that site visitors give to the content of your website in the following ways:

- Moderate All Ratings

- Moderating Ratings by Topic

- Moderating Ratings by User

27.2.1 Moderate All Ratings

To access the "All Ratings" screen (shown inFigure 27–2), select **Ratings** from the menu bar, then select **Moderate**, and then select **All Ratings**. The "All Ratings" screen is used to view and moderate all of the ratings that visitors have given to your website's content. The type of rating that site visitors can give to the content of your website depends on the type of ratings widget that was deployed: Stars, Thumbs Up/Down, Like It, and Recommend Ratings. The ratings are listed in the order they were posted (most recent to least recent). You can sort the ratings in this list by either the visitor who posted the rating or the date the rating was posted.

Figure 27–2   'All Ratings' Screen
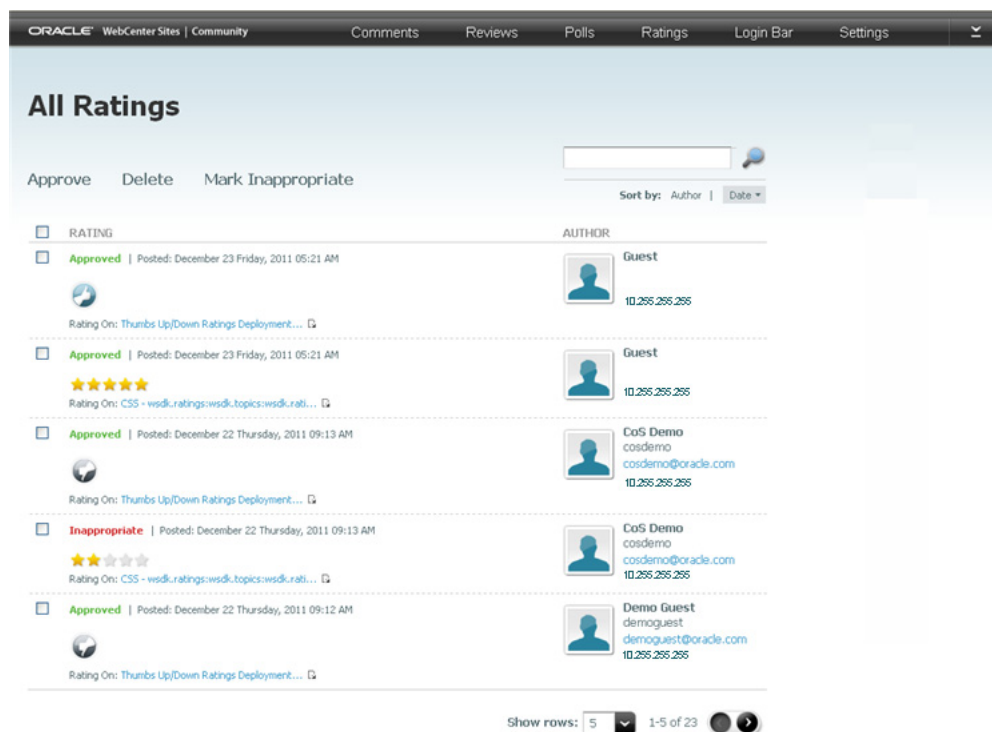
Table 27–1   Moderating All Ratings

Action	Instructions
Approve visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. Point to the rating you wish to approve.
	3. In the menu that appears, select **Approve**.
	The approved rating is added to the total number of votes displayed by the widget for the web page and to the total number of votes displayed in the "Details" pop-up box when a visitor points to the Average Rating widget deployed on the website.
Delete visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. Point to the rating you wish to delete.
	3. In the menu that appears, select **Delete**.
	4. In the confirmation box, click **OK**.
	The rating is removed from the Community interface and from the total number of votes displayed by the widget on the web page for which the vote was posted.
Mark a rating as inappropriate	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. Point to the rating that is inappropriate or inaccurate.
	3. In the menu that appears, select **Mark Inappropriate**.
	The status of the rating changes to **Inappropriate** and the rating is not included in the total number of votes displayed by the widget on the web page for which the rating was posted. Marking the rating as inappropriate indicates to other moderators that the rating must be reviewed before including it in the total number of votes for the web page.
	Note: Ratings can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Add an authenticated visitor to the "Visitor Whitelist"	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. Point to the rating posted by the visitor you wish to add to the whitelist.
	3. In the menu that appears, select **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."

Table 27–1   (Cont.) Moderating All Ratings

Action	Instructions
Add a visitor to the "Visitor Blacklist"	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. Point to the rating posted by the visitor you wish to add to the blacklist.
	3. In the menu that appears, select **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the "Visitor Blacklist," see Section 30.2.4, "Working with the Visitor Whitelist Screen".
Search for ratings posted by a specific visitor	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. In the "Search" field, enter the name or IP address of the visitor you wish to search for.
	3. Click the **magnifying glass** icon.
	All ratings posted by visitors matching your search criteria are listed in the "All Ratings" screen.
View a topic on the website	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. In the list of ratings, navigate to the rating posted to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed ratings widget, and the ratings visitors posted to the page.
View all ratings posted by a specific visitor	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. In the list of ratings, navigate to the rating that is posted by the desired authenticated visitor.
	3. Click the visitor's name.
	The "User Ratings" screen opens and displays only the ratings posted by the selected visitor.
	Note: For information about moderating ratings by user, see Section 27.2.3, "Moderating Ratings by User".
View all ratings posted to a specific topic	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **All Ratings**.
	2. In the list of ratings, navigate to the rating that is posted to the desired topic.
	3. Click the name of the topic.
	The "All Ratings" screen opens and displays only the ratings posted to the selected topic.
	Note: For information about moderating ratings by topic, see Section 27.2.2, "Moderating Ratings by Topic".

27.2.2 Moderating Ratings by Topic

To access the "Ratings by Topic" screen (shown in Figure 27–3), select **Ratings** from the menu bar, then select **Moderate**, and then select **Ratings by Topic**. The "Ratings by Topic' screen is used to sort all ratings given to the pages of your website by the title of

the topic (page) to which the rating is posted. The average rating given to each topic is listed in the Ratings column, located to the right of the corresponding topic. When you select the title of a topic from this screen, the "All Ratings" screen opens and displays only the ratings posted to that topic.

Figure 27–3   'Ratings by Topic' Screen

Clicking the name of a topic in the "Ratings by Topic" screen opens the "All Ratings" screen, which displays only the ratings posted to that topic.

Table 27–2   Moderating Ratings by Topic

Action	Instructions
Filter topics by category	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Filter" panel, select the checkbox(es) of the desired resource type(s).
	The web pages (topics) with ratings widgets of the selected resource type(s) are the only web pages that will be displayed in the "Ratings by Topic" screen.
	3. Select the topic whose ratings you wish to view.
	The "All Ratings" screen opens and displays only the ratings posted to the topic you selected.
	Note: The resource types available in the Filter panel are dynamically modified by the current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings"). Others refers to ratings widgets (and topics) that do not belong to a resource type.
Approve visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, select the topic whose ratings you wish to moderate.
	3. In the "All Ratings" screen for the topic you selected, point to the rating you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved rating is added to the total number of votes displayed by the widget for the web page and to the total number of votes displayed in the "Details" pop-up box when a visitor points to the Average Rating widget deployed on the website.
Delete visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, select the topic whose ratings you wish to moderate.
	3. In the "All Ratings" screen for the topic you selected, point to the rating you wish to delete.
	4. In the menu that appears, select **Delete**.
	5. In the confirmation box, click **OK**.
	The rating is removed from the Community interface and from the total number of votes displayed by the widget on the web page for which the vote was posted.

Table 27–2 (Cont.) Moderating Ratings by Topic

Action	Instructions
Mark a rating as inappropriate	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, select the topic whose ratings you wish to moderate.
	3. In the "All Ratings" screen for the topic you selected, point to the rating that is inappropriate or inaccurate.
	4. In the menu that appears, select **Mark Inappropriate**.
	The status of the rating changes to **Inappropriate** and the rating is not included in the total number of votes displayed by the widget on the web page for which the rating was posted. Marking the rating as inappropriate indicates to other moderators that the rating must be reviewed before including it in the total number of votes for the web page.
	Note: Ratings can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Add an authenticated visitor to the "Visitor Whitelist"	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, select the topic whose ratings you wish to moderate.
	3. In the "All Ratings" screen for the topic you selected, point to the rating posted by the visitor you wish to add to the whitelist.
	4. In the menu that appears, select **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the Visitor Whitelist, see Section 30.2.4, "Working with the Visitor Whitelist Screen."
Add a visitor to the "Visitor Blacklist"	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, select the topic whose ratings you wish to moderate.
	3. In the "All Ratings" screen for the topic you selected, point to the rating posted by the visitor you wish to add to the blacklist.
	4. In the menu that appears, select **Blacklist Author**.
	The "Visitor Blacklist" screen opens. If the visitor is authenticated, the visitor's user name is displayed in the list of blacklisted visitors. If the visitor is anonymous, the visitor's IP address is displayed in the list of blacklisted visitors.
	Note: For more information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen.".
Search for a specific topic	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Search" field, enter the title of the topic you wish to search for.
	3. Click the **magnifying glass** icon.
	The topic you searched for is the only topic listed in the "Ratings by Topic" screen.

Table 27–2   (Cont.) Moderating Ratings by Topic

Action	Instructions
View a topic on the website	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, navigate to the desired topic.
	3. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed ratings widget, and the ratings visitors posted to the page.
View all the ratings posted by a specific visitor	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by Topic**.
	2. In the "Ratings by Topic" screen, navigate to and click the name of the topic to which the desired visitor posted a rating.
	3. In the "All Ratings" screen for the topic you selected, navigate to the rating posted by the desired visitor and click the visitor's name (located to the right of the rating the visitor posted).
	The "User Ratings" screen opens and displays all of the ratings posted by the selected visitor.
	Note: For more information about moderating ratings by user, see Section 27.2.3, "Moderating Ratings by User."

27.2.3 Moderating Ratings by User

To access the "Ratings by User" screen (shown in Figure 27–4), select **Ratings** from the menu bar, then select **Moderate**, and then select **Ratings by User**. The "Ratings by User" screen is used to sort all ratings posted to your website by the names of the visitors who posted them. When you select a visitor's name from this screen, the User Ratings screen opens and displays the ratings that visitor posted to the website along with the visitor's user name, profile picture, and e-mail address (if available).

Figure 27–4   'Ratings by User' Screen
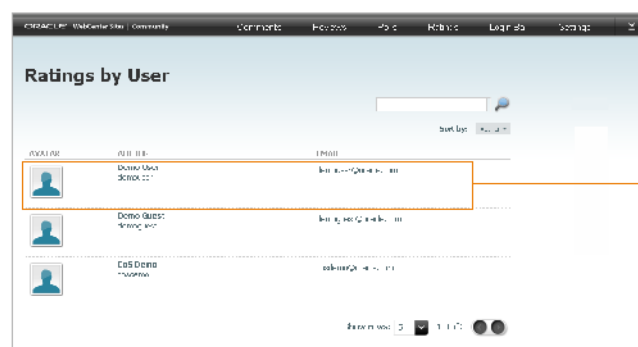
Clicking a visitor's user name in the "Ratings by User" screen opens the "User Ratings" screen, which displays the selected visitor's profile information along with all the ratings that visitor has posted to the website.
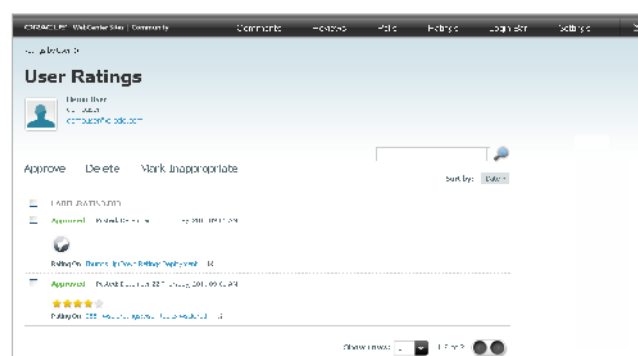
Table 27–3   Moderating Ratings by User

Action	Instructions
Approve visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose ratings you wish to moderate.
	3. In the "User Ratings" screen, point to the rating you wish to approve.
	4. In the menu that appears, select **Approve**.
	The approved rating is added to the total number of votes displayed by the widget for the web page and to the total number of votes displayed in the "Details" pop-up box when a visitor points to the Average Rating widget deployed on the website.
Delete visitors' ratings	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose ratings you wish to moderate.
	3. In the "User Ratings" screen, point to the rating you wish to delete.
	4. In the menu that appears, select **Delete**.
	5. In the confirmation box, click **OK**.
	The rating is removed from the Community interface and from the total number of votes displayed by the widget on the web page for which the vote was posted.

Table 27–3   (Cont.) Moderating Ratings by User

Action	Instructions
Mark a rating as inappropriate	**1.** In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose ratings you wish to moderate.
	3. In the "User Ratings" screen, point to the rating that is inappropriate or inaccurate.
	4. In the menu that appears, click **Mark Inappropriate**.
	The status of the rating changes to **Inappropriate** and the rating is not included in the total number of votes displayed by the widget on the web page for which the rating was posted. Marking the rating as inappropriate indicates to other moderators that the rating must be reviewed before including it in the total number of votes for the web page.
	Note: Ratings can be marked as inappropriate either manually or through auto moderation. For information about configuring automatic moderation, see Chapter 30, "Configuring Community Widget Settings."
Add an authenticated visitor to the "Visitor Whitelist"	If you know which authenticated visitor you want to add to the whitelist, do the following:
	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, point to the visitor's name.
	3. In the menu that appears, click **Whitelist Author**.
	The "Visitor Whitelist" opens, and the visitor's name is displayed in the list of whitelisted visitors.
	If you wish to view the ratings posted by the visitor before adding that visitor to the whitelist, do the following:
	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose ratings you wish to view.
	3. In the "User Ratings" screen, point to any of the ratings displayed in the list.
	4. In the menu that appears, select **Whitelist Author**.
	The "Visitor Whitelist" screen opens, and the visitor's name is displayed in the list of whitelisted visitors.
	Note: For more information about the "Visitor Whitelist," see Section 30.2.4, "Working with the Visitor Whitelist Screen."

Table 27–3   (Cont.) Moderating Ratings by User

Action	Instructions
Add an authenticated visitor to the "Visitor Blacklist"	If you know which visitor you want to add to the blacklist, do the following:
	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the Ratings By User screen, point to the visitor's name.
	3. In the menu that appears, click **Blacklist Author**.
	The "Visitor Blacklist" opens, and the visitor's name is displayed in the list of blacklisted visitors.
	If you wish to view the ratings posted by the visitor before adding that visitor to the blacklist, do the following:
	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose ratings you wish to view.
	3. In the "User Ratings" screen, point to any of the ratings displayed in the list.
	4. In the menu that appears, select **Blacklist Author**.
	The "Visitor Blacklist" screen opens, and the visitor's name is displayed in the list of blacklisted visitors.
	Note: For more information about the "Visitor Blacklist," see Section 30.2.3, "Working with the Visitor Blacklist Screen."
Search for a specific visitor	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Search" field, enter the name of the visitor you wish to search for.
	3. Click the **magnifying glass** icon.
	The names of the visitors that match your search criteria are the only names displayed in the "Ratings by User" screen.
View a topic on the website	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of the visitor whose rating is posted to the desired topic.
	3. In the "User Ratings" screen, navigate to the desired rating.
	4. Click the **View Topic Page** icon.
	The web page opens displaying the topic, the deployed ratings widget, and the ratings visitors posted to the page.

Table 27–3   (Cont.) Moderating Ratings by User

Action	Instructions
View all the ratings posted to a specific topic	1. In the menu bar, select **Ratings**, then select **Moderate**, and then select **Ratings by User**.
	2. In the "Ratings by User" screen, select the name of a visitor who posted a rating to the desired topic.
	3. In the "User Ratings" screen, navigate to the rating the visitor posted to the desired topic, and click the name of the topic (located under the visitor's rating).
	The "All Ratings" screen for the topic you selected opens and displays all of the ratings posted to that topic.
	Note: For more information about moderating ratings by topic, see Section 27.2.2, "Moderating Ratings by Topic."

27.3 Reconfiguring the Ratings Widget's Default Settings

Default settings are a widget's saved appearance and permission settings. Designers can modify the default appearance settings of the ratings widgets (Stars, Thumbs Up/Down, Like It, and Recommend) by selecting **Ratings**, **Configure**, and then **Appearance** in the menu bar. Moderators can reconfigure the default rating permissions by selecting **Ratings**, **Configure**, and then **Permissions** in the menu bar. Once the permissions and settings are saved, the system dynamically updates the default ratings widget tags in the Community interface and on pages where tags with default settings are deployed.

You can reconfigure the default settings of the ratings widgets (Stars, Thumbs Up/Down, Like It, and Recommend) in the following ways:

- Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings"

- Section 27.3.2, "Reconfiguring the Ratings Widgets' Permissions Settings"

27.3.1 Reconfiguring the Ratings Widgets' Appearance Settings

To access the "Ratings Appearance" screen (shown inFigure 27–5), select **Ratings** from the menu bar, then select **Configure**, and then select **Appearance**. This screen can be used by designers to reconfigure the Stars, Thumbs Up/Down, Like It, and Recommend Ratings widgets' display properties, such as whether a Login Bar widget will be displayed with each type of ratings widget tag you deploy.

Figure 27–5   'Ratings Appearance' Screen

Table 27–4 Reconfiguring the Ratings Widget's Appearance Settings

Section	Field	Description
General	Login Bar Required	Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with each type of ratings widget tag (Stars, Thumbs Up/Down, Like It, and Recommend). **Note:** If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as a ratings widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").
Topic Categories	Upload Categories	Use the **Browse** button to upload the desired category file, which will dynamically modify the resource types available from: ■ The Resource Type field in the Stars, Thumbs Up/Down, Like It, and Recommend Ratings widget tag custom deployment screens. ■ The Resource Type field in the Recently Rated (Section 27.4.3.6, "Custom Recently Rated Widget Tag's Deployment Screen") and Most Rated (Section 27.4.3.7, "Custom Most Rated Widget Tag's Deployment Screen") widget tag deployment screens. ■ The Ratings by Topics screen's Filter panel (Section 27.2.2, "Moderating Ratings by Topic"). **Note:** The category file must be in `.txt` format, the resource types listed in the file must be in a `key=value` structure, only an English alphanumeric string is permitted for the `key` in the `key=value` pairs, each resource type listed in the file must be on its own line, and the size of the file you are uploading can be no more than 100KB.

27.3.2 Reconfiguring the Ratings Widgets' Permissions Settings

To access the "Rater Permissions" screen (shown inFigure 27–6), select **Ratings** from the menu bar, then select **Configure**, and then select **Permissions**. This screen can be used by moderators to set visitors' permissions to rate website content.

Figure 27–6 'Rater Permissions' Screen

Table 27–5   Reconfiguring Rating Permissions for Site Visitors

Section	Field
Who Can Rate	■ **Anonymous users can rate** grants rating permissions to all site visitors.
	■ **Only authenticated users can rate** grants rating permissions only to authenticated site visitors.

27.4 Deploying the Ratings Widgets

This section is for designers. You can deploy the widget tags related to rating functionality with either default or custom settings by selecting **Ratings**, **Deploy**, and then the *name of the widget tag you wish to deploy* in the menu bar. Table 27–6 lists the ratings widget tags and indicates which type of deployment each tag supports.

Table 27–6   Deploying the Ratings Widget Tags

Widget Tag	Deploy with Default Settings	Configure and Deploy Custom Settings
Stars Ratings	Yes	Yes
Thumbs Up/Down Ratings	Yes	Yes
Like It Ratings	Yes	Yes
Recommend Ratings	Yes	Yes
Average Rating	No	Yes
Recently Rated	Yes	Yes
Most Rated	Yes	Yes

This section contains the following topics:

- Section 27.4.1, "Deploying a Default Ratings Widget Tag"

- Section 27.4.2, "Deploying Custom Ratings Widget Tags"

- Section 27.4.3, "Custom Ratings Widget Tag Deployment Screens"

27.4.1 Deploying a Default Ratings Widget Tag

Several types of ratings widgets can be deployed with default settings: Stars, Thumbs Up/Down, Like It, Recommend, Recently Rated, and Most Rated. The default settings for the Stars, Thumbs Up/Down, Like It, and Recommend ratings widgets are their saved settings, which are configured in the **Ratings** menu's "Permissions" screen (select **Ratings**, **Configure**, and then **Permissions**) and "Appearance" screen (select **Ratings**, **Configure**, and then **Appearance**). The default settings for all other ratings widgets are configured out-of-the-box and cannot be reconfigured in the Community interface. Each ratings widget has its own deployment screen, which displays the widget tag. The default settings are used as property values in the widget tag.

> **Note:** If you want to deploy more than one Stars, Thumbs
> Up/Down, Like It Ratings, or Recommend Ratings widget tag on the
> same page or if you want to deploy several different types of ratings
> widgets on the same page, you must provide a resource ID for each
> ratings widget you wish to deploy on that page. For more
> information, see Section 27.4.2, "Deploying Custom Ratings Widget
> Tags."

To deploy default ratings widget tags

1. In the menu bar, select **Ratings**, **Deploy**, and then the *name of the widget tag you
    wish to deploy*:

    -   **Stars Ratings –** to deploy the Stars Ratings widget tag. When this tag is
        deployed, it displays a rating field of five stars which site visitors can use to
        rate the content of a web page (one star represents the lowest rating that can
        be given to a web page and five stars represents the highest rating).

        > **Note:** If you want the Ratings Average Rating widget to display the
        > average rating of the web page on which a Stars Ratings widget is
        > deployed, you will have to customize the Stars Ratings widget by
        > specifying a resource ID. For more information, see the description of
        > the Resource ID field in Table 27–7.

    -   **Thumb Up/Down Ratings** – to deploy the Thumbs Up/Down Ratings widget
        tag. When this tag is deployed, it displays a rating field with a thumbs up and
        a thumbs down option. By clicking one of these options, visitors can indicate
        whether a particular topic was helpful.

    -   **Like It Ratings** – to deploy the Like It Ratings widget tag. When this tag is
        deployed, it displays a **Like** option which visitors can click to indicate whether
        they liked a particular topic.

    -   **Recommend Ratings** – to deploy the Recommend Ratings widget tag. When
        this tag is deployed, it displays an **Email a Friend** option which visitors can
        click to email the URL of the page on which this widget is deployed to one or
        more of their contacts.

    -   **Recently Rated** – to deploy the Recently Rated widget tag. When this tag is
        deployed, it displays a list of the top ten web pages (topics) site visitors have
        recently rated.

        > **Note:** By default, the Recently Rated widget lists topics that have an
        > associated ratings widget of resource type Others. To configure the
        > Recently Rated widget to list topics of all resource types, you will have
        > to modify the widget tag by removing the `"resource_type":"other"`
        > parameter. For more information, see the *Oracle Fusion Middleware
        > WebCenter Sites Developer's Guide*.

    -   **Most Rated** – to deploy the Most Rated widget tag. When this tag is deployed,
        it displays a list of the top ten web pages (topics) site visitors frequently rate.

> **Note:** By default, the Most Rated widget lists topics that have an associated ratings widget of resource type Others. To configure the Most Rated widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

The deployment screen for each widget tag looks similar to the Stars Ratings Deployment screen, shown in Figure 27–7:

Figure 27–7 'Stars Ratings Deployment' Screen: Site Settings vs. Custom Settings
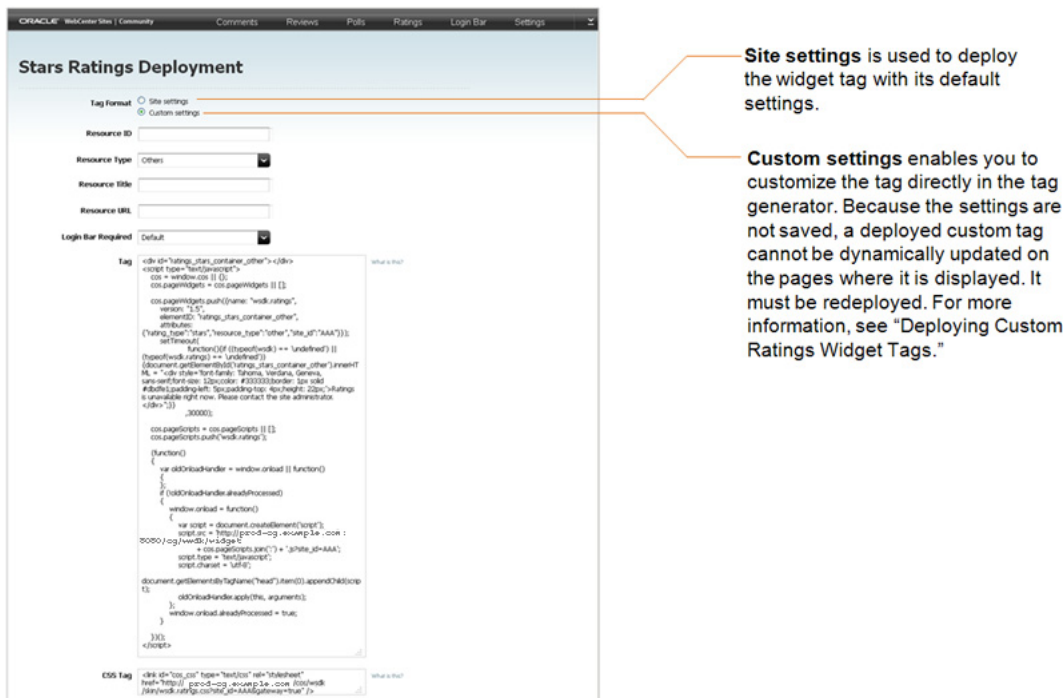
1. In the "Tag Format" field, make sure **Site settings** is selected.

2. Deploy the widget tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For detailed instructions, see steps 3 – 7 in the Section 24.3, "Next Steps."

27.4.2 Deploying Custom Ratings Widget Tags

You can customize any widget tag related to rating functionality by setting its properties using the tag generator in the widget's Deployment screen. Each time a widget tag is customized, it must be re-deployed because custom values cannot be saved in the Community interface, instead they are saved only in the particular instance of the widget tag.

To configure and deploy custom ratings widget tags

1. In the menu bar, select **Ratings**, **Deploy**, and then the *name of the widget tag you wish to customize and deploy*:

    ■   **Stars Ratings** – to customize and deploy the Stars Ratings widget tag: (1) Configure the Stars Ratings widget tag with a unique identifier and resource type so that it can be referred to by other rating related widgets for its content, such as the number of ratings and average rating. (2) Specify the web page (topic title and URL) on which the Stars Ratings widget tag is deployed. (3) Specify whether a Login Bar widget will be displayed with the Stars Ratings widget.

    ■   **Thumbs Up/Down Ratings** – to customize and deploy the Thumbs Up/Down Ratings widget tag: that is, (1) Configure the Thumbs Up/Down Ratings widget tag with a unique identifier and resource type so that you can deploy multiple Thumbs Up/Down Ratings widget tags on the same page and so other rating related widgets can refer to its content, such as the date of the most recently posted rating. (2) Specify the web page (topic title and URL) on which the Thumbs Up/Down Ratings widget tag is deployed. (3) Specify whether a Login Bar widget will be displayed with the Thumbs Up/Down Ratings widget.

    ■   **Like It Ratings** – to customize and deploy the Like It Ratings widget tag: that is, (1) Configure the Like It Ratings widget tag with a unique identifier and resource type so that you can deploy multiple Like It Ratings widget tags on the same page and so other rating related widgets can refer to its content, such as the date of the most recently posted rating. (2) Specify the web page (topic title and URL) on which the Like It Ratings widget tag is deployed. (3) Specify whether a Login Bar widget will be displayed with the Like It Ratings widget.

    ■   **Recommend Ratings** – to customize and deploy the Recommend Ratings widget tag: that is, (1) Configure the Recommend Ratings widget tag with a unique identifier and resource type so that you can deploy multiple Recommend Ratings widgets on the same page and so other rating related widgets can refer to its content, such as the date of the most recently posted rating. (2) Specify the web page (topic title and URL) on which the Recommend Ratings widget tag is deployed. (3) Specify whether a Login Bar widget will be displayed with the Recommend Ratings widget.

    ■   **Average Rating** – to customize and deploy the Ratings Average Rating widget tag: that is, for the Ratings Average Rating widget to display the average rating of a given topic (web page), it must be configured to specify the resource ID of either the Stars Ratings widget or Thumb Up/Down Ratings widget that is deployed on the desired topic (web page).

    ■   **Recently Rated** – to customize and deploy the Recently Rated widget tag: that is, have the Recently Rated widget display recently rated topics of a desired type (instead of topics of type "Others"). For example, topics of type "Article" are posted on a web page; each article has its own ratings widget (Stars, Thumbs Up/Down, Like It, and/or Recommend) of resource type "Article." If the Recently Rated widget is to list the recently rated topics of type "Article," it must be configured to refer to the ratings widget(s) by resource type.

    Note: To configure the Recently Rated widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

- **Most Rated** – to customize and deploy the Most Rated widget tag: that is, have the Most Rated widget display the most popular topics of a desired type (instead of topics of type "Others"). For example, topics of type "Article" are posted on a web page; each article has its own ratings widget (Stars, Thumbs Up/Down, Like It, and/or Recommend) of resource type "Article." If the Most Rated widget is to list the most popular topics of type "Article," it must be configured to refer to the ratings widget(s) by resource type.

Note: To configure the Most Rated widget to list topics of all resource types, you will have to modify the widget tag by removing the `"resource_type":"other"` parameter. For more information, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

---

2. In the "Tag Format" field, select **Custom settings**. Customize the desired widget tag by setting values for the available fields in the tag's custom deployment screen.

   For field definitions, see:

   - Section 27.4.3.1, "Custom Stars Ratings Widget Tag's Deployment Screen"
   - Section 27.4.3.2, "Custom Thumbs Up/Down Ratings Widget Tag's Deployment Screen"
   - Section 27.4.3.3, "Custom Like It Ratings Widget Tag's Deployment Screen"
   - Section 27.4.3.4, "Custom Recommend Ratings Widget Tag's Deployment Screen"
   - Section 27.4.3.5, "Custom Ratings Average Rating Widget Tag's Deployment Screen"
   - Section 27.4.3.6, "Custom Recently Rated Widget Tag's Deployment Screen"
   - Section 27.4.3.7, "Custom Most Rated Widget Tag's Deployment Screen"

3. Deploy the custom tag:

   a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

   b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For detailed instructions, see steps 3 – 7 in Section 24.2, "How Do I Deploy Community Widget Tags?"

27.4.3 Custom Ratings Widget Tag Deployment Screens

Once you access a given widget's custom deployment screen, you can use the available fields to set custom (temporary) values for the widget tag. These values are not saved, except in the template to which you copy the customized instance of the tag. This section provides field definitions.

27.4.3.1 Custom Stars Ratings Widget Tag's Deployment Screen

The screen shown in Figure 27–8 is used to define custom values for a particular instance of the Stars Ratings widget tag, which can then be deployed on web pages.

Figure 27–8   Custom 'Stars Ratings Deployment' Screen

> **Note:** The **Default** field value references the setting that is specified in the widget's "Appearance" screen. If you choose a default setting for your custom tag, and you deploy the tag, the default setting will be dynamically updated if its value is modified and saved in the Community interface.

Table 27–7   Customizing and Deploying the Stars Ratings Widget Tag

Field	Description
Resource ID	Enter a resource ID (unique identifier) for this instance of the Stars Ratings widget tag. This resource ID can be used in other ratings widget tags (for example, the Ratings Average Rating widget tag) to refer to this instance of the Stars Ratings widget. You can enter a maximum of 50 English alphanumeric characters into this field. **Note:** This field is required if: ■ You want to configure other rating related widget tags to refer to this Stars Ratings widget's content (for example, the average rating of the web page). ■ You want to deploy more than one Stars Ratings widgets on the same web page. ■ You want to deploy multiple types of ratings widgets on the same page. For example, if you want to deploy a Like It ratings widget and a Recommend ratings widget on the same page, you will need to specify a Resource ID for both ratings widgets.
Resource Type	Select a resource type (topic type) for this instance of the Stars Ratings widget tag. The resource type of a Stars Ratings widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Stars Ratings widget tag is deployed is associated with the default "Others" resource type. **Note:** The current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Resource Title	Enter the title of the web page on which this instance of the Stars Ratings widget tag will be deployed.
Resource URL	Enter the URL of the web page on which this instance of the Stars Ratings widget tag will be deployed.
Login Bar Required	Select either **Yes** or **No** to determine whether a Login Bar widget tag will be embedded in and deployed with this instance of the Stars Ratings widget tag. **Note:** If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Stars Ratings widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

27.4.3.2 Custom Thumbs Up/Down Ratings Widget Tag's Deployment Screen

The screen shown in Figure 27–9 is used to define custom values for a particular instance of the Thumbs Up/Down Ratings widget tag, which can then be deployed on web pages.

Figure 27–9   Custom 'Thumbs Up/Down Ratings Deployment' Screen

> **Note:**   The **Default** field value references the setting that is specified in the widget's "Appearance" screen. If you choose a default setting for your custom tag, and you deploy the tag, the default setting will be dynamically updated if its value is modified and saved in the Community interface.

Table 27–8   Customizing and Deploying the Thumbs Up/Down Ratings Widget Tag

Field	Description
Resource ID	Enter a resource ID (unique identifier) for this instance of the Thumbs Up/Down Ratings widget tag. If you are deploying multiple Thumbs Up/Down Ratings widget tags on the same page, this resource ID is used to uniquely identify this instance of the Thumbs Up/Down Ratings widget tag. You can enter a maximum of 50 English alphanumeric characters into this field. **Note:** This field is required only if you want to deploy multiple Thumbs Up/Down Ratings widget tags on the same page.
Resource Type	Select a resource type (topic type) for this instance of the Thumbs Up/Down Ratings widget tag. The resource type of a Thumbs Up/Down Ratings widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Thumbs Up/Down Ratings widget tag is deployed, is associated with the default "Others" resource type. **Note:** The current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Resource Title	Enter the title of the web page on which this instance of the Thumbs Up/Down Ratings widget tag will be deployed.
Resource URL	Enter the URL of the web page on which this instance of the Thumbs Up/Down Ratings widget tag will be deployed.
Login Bar Required	Select either **Yes** or **No** to determine whether a Login Bar widget tag will be embedded in and deployed with this instance of the Thumbs Up/Down Ratings widget tag. **Note:** If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Thumbs Up/Down Ratings widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

27.4.3.3 Custom Like It Ratings Widget Tag's Deployment Screen

The screen shown in Figure 27–10 is used to define custom values for a particular instance of the Like It Ratings widget tag, which can then be deployed on web pages.

Figure 27–10   Custom 'Like It Ratings Deployment' Screen

> **Note:**   The **Default** field value references the setting that is specified in the widget's "Appearance" screen. If you choose a default setting for your custom tag, and you deploy the tag, the default setting will be dynamically updated if its value is modified and saved in the Community interface.

Table 27–9 Customizing and Deploying the Like It Ratings Widget Tag

Field	Description
Resource ID	Enter a resource ID (unique identifier) for this instance of the Like It Ratings widget tag. If you are deploying multiple Like It Ratings widget tags on the same page, this resource ID is used to uniquely identify this instance of the Like It Ratings widget tag. You can enter a maximum of 50 English alphanumeric characters into this field. **Note:** This field is required only if you want to deploy multiple Like It Ratings widget tags on the same page.
Resource Type	Select a resource type (topic type) for this instance of the Like It Ratings widget tag. The resource type of a Like It Ratings widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Like It Ratings widget tag is deployed is associated with the default "Others" resource type. **Note:** The current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Resource Title	Enter the title of the web page on which this instance of the Like It Ratings widget tag will be deployed.
Resource URL	Enter the URL of the web page on which this instance of the Like It Ratings widget tag will be deployed.
Login Bar Required	Select either **Yes** or **No** to determine whether a Login Bar widget tag will be embedded in and deployed with this instance of the Like It Ratings widget tag. **Note:** If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as the Like It Ratings widget tag (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

27.4.3.4 Custom Recommend Ratings Widget Tag's Deployment Screen

The screen shown in Figure 27–11 is screen is used to define custom values for a particular instance of the Recommend Ratings widget tag, which can then be deployed on web pages.

Figure 27–11 Custom 'Recommend Ratings Deployment' Screen

Table 27–10 Customizing and Deploying the Recommend Ratings Widget Tag

Field	Description
Resource ID	Enter a resource ID (unique identifier) for this instance of the Recommend Ratings widget tag. If you are deploying multiple Recommend Ratings widget tags on the same page, this resource ID is used to uniquely identify this instance of the Recommend Ratings widget tag. You can enter a maximum of 50 English alphanumeric characters into this field. **Note:** This field is required only if you want to deploy multiple Recommend Ratings widget tags on the same page.

Table 27–10 (Cont.) Customizing and Deploying the Recommend Ratings Widget Tag

Field	Description
Resource Type	Select a resource type (topic type) for this instance of the Recommend Ratings widget tag. The resource type of a Recommend Ratings widget tag categorizes the web page on which it is deployed. If you do not specify a resource type, the topic (web page) on which this instance of the Recommend Ratings widget tag is deployed is associated with the default "Others" resource type.
	Note: The current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Resource Title	Enter the title of the web page on which this instance of the Recommend Ratings widget tag will be deployed.
Resource URL	Enter the URL of the web page on which this instance of the Recommend Ratings widget tag will be deployed.
Login Bar Required	Select either **Yes** or **No** to determine whether a Login Bar widget tag will be embedded in and deployed with this instance of the Recommend Ratings widget tag.
	Note: If you select **No**, you can still deploy a standalone Login Bar widget tag on the same page as this instance of the Recommend Ratings widget (for instructions, see Section 28.3, "Deploying a Login Bar Widget Tag").

27.4.3.5 Custom Ratings Average Rating Widget Tag's Deployment Screen

The screen shown in Figure 27–12 is used to define custom values for a particular instance of the Ratings Average Rating widget tag, which can then be deployed on web pages.

Figure 27–12   'Ratings Average Rating Deployment' Screen

Table 27–11   Customizing and Deploying the Average Rating Widget Tag

Field	Description
Resource ID	Specify the resource ID (unique identifier) of a Stars Ratings or Thumbs Up/Down Ratings widget. When this instance of the Ratings Average Rating widget is deployed, it displays the average rating of the web page on which the specified ratings widget is deployed.

27.4.3.6 Custom Recently Rated Widget Tag's Deployment Screen

The screen shown in Figure 27–13 is used to define custom values for a particular instance of the Recently Rated widget tag, which can then be deployed on web pages.

Figure 27–13   'Recently Rated Deployment' Screen
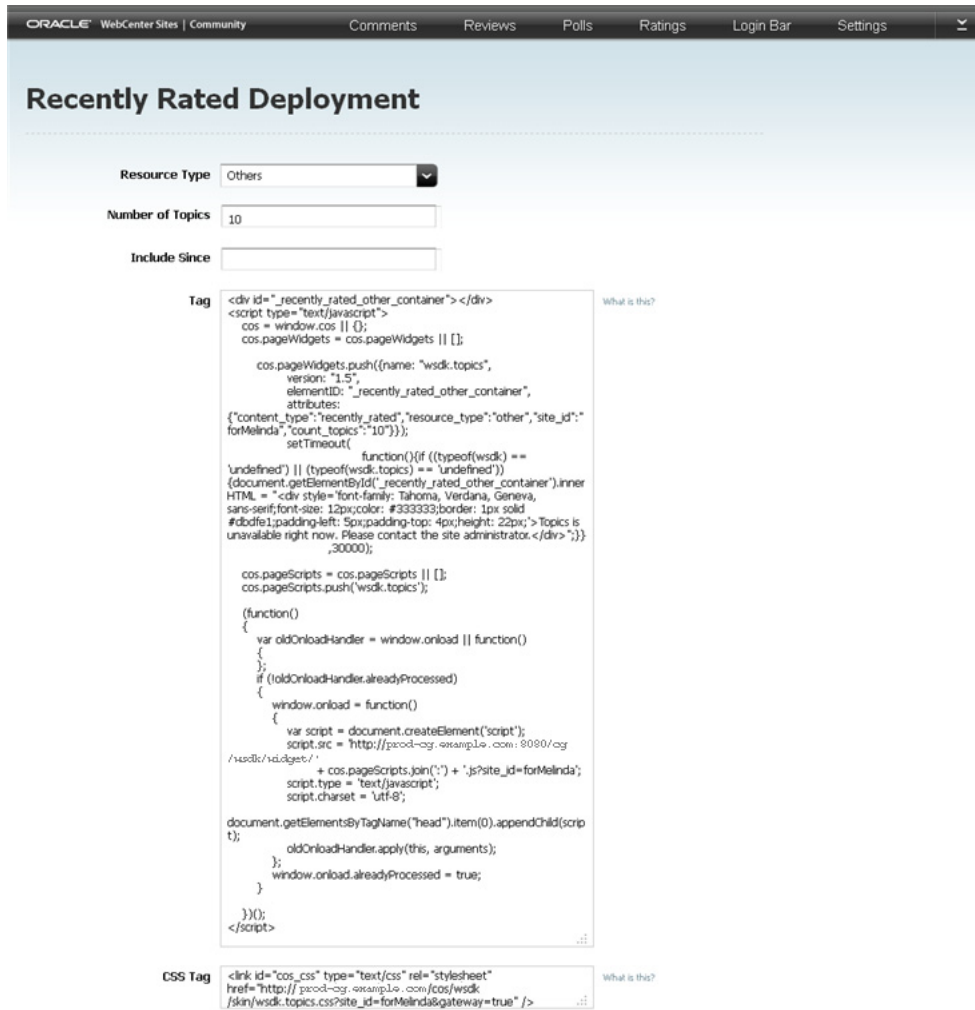
Table 27–12   Customizing and Deploying the Recently Rated Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Recently Rated widget is deployed, it lists the recently rated topics of a certain type (for example, "Article") on which a ratings widget assigned to the specified resource type is deployed. If the deployed ratings widgets are not assigned a resource type, select "Others."
	Default Value: Others
	Note: The current category file (Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) to be included in this list (for example, enter 5 to display the five most recently rated topics).
	Default Value: 10

Table 27–12   (Cont.) Customizing and Deploying the Recently Rated Widget Tag

Field	Description
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Recently Rated widget lists only the web pages whose ratings were posted on or after the specified date. This allows you to avoid displaying outdated pages and ratings.
	Note: If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

27.4.3.7 Custom Most Rated Widget Tag's Deployment Screen

The screen shown in Figure 27–14 is used to define custom values for a particular instance of the Most Rated widget tag, which can then be deployed on web pages.

Figure 27–14   'Most Rated Deployment' Screen

Table 27–13   Customizing and Deploying the Most Rated Widget Tag

Field	Description
Resource Type	Select a resource type (topic type). When the Most Rated widget is deployed, it lists the most popular topics of a certain type (for example "Article") on which a ratings widget assigned to the specified resource type is deployed. If the deployed ratings widgets are not assigned a resource type, select "Others."
	Default Value: Others
	Note: The current category file (see Section 27.3.1, "Reconfiguring the Ratings Widgets' Appearance Settings") determines the resource types that are available to you.
Number of Topics	Specify the number of web pages (topics) that can be included in this list (for example, enter 5 to display the five topics site visitors frequently rated).
	Default Value: 10
Include Since	Click in this field to render the date picker. Select a date by which to filter the web pages that will be listed. When deployed, the Most Rated widget lists only the web pages whose ratings were posted on or after the specified date. This allows you to avoid displaying outdated pages and ratings.
	Note: If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).

28

Working with the Login Bar Widget

This chapter is for designers and provides a quick reference for reconfiguring settings for the Login Bar widget and deploying the Login Bar widget tag. The Login Bar widget is common between the Community and Gadgets applications – any changes you make to the Login Bar widget in the Community interface are also applied to the Login Bar widget in the Gadgets User interface, and vice versa. Therefore, when a visitor logs in to the community widgets on your website, they are also logged in to the gadgets and dashboard widgets that are deployed on the website.

> **Note:** For information about working with the Oracle WebCenter Sites: Gadgets application, see Part IV, "Using the Gadgets Application."

This chapter contains the following sections:

- Section 28.1, "Overview"
- Section 28.2, "Reconfiguring the Login Bar Widget's Default Settings"
- Section 28.3, "Deploying a Login Bar Widget Tag"

28.1 Overview

Figure 28–1   Login Bar Menu

The **Login Bar** menu (shown in Figure 28–1) is used to reconfigure the login bar site visitors use to log in to the community widgets (and gadgets) deployed on the pages of your company's website. Configuring login settings includes determining which credentials (for example, Facebook and Twitter) visitors can use to log in to community widgets (and gadgets). Once you save these configurations, all login bar widgets (standalone and embedded) deployed on the website will use the new settings.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In."

28.2 Reconfiguring the Login Bar Widget's Default Settings

The Login Bar widget's default settings are its saved settings. These settings determine which credentials visitors can use to log in to the community widgets (and gadgets) on your website, and whether visitors can share their comments and reviews with social network news feeds such as Facebook and Twitter.

> **Note:** The Login Bar widget tag is common to both the Community and Gadgets applications. The instructions in this section can be applied to reconfiguring the Login Bar widget tag in the Community interface and the Gadgets User interface. For more information about the Gadgets application, see Part IV, "Using the Gadgets Application."

To reconfigure the Login Bar widget's default settings, designers can select **Login Bar**, and then **Configure** in the menu bar, which opens the "Social Login and Sharing Settings" screen (shown in Figure 28–2). Once default settings are saved, all Login Bar widget tags deployed on the website (including standalone instances and instances that are embedded in and deployed with community and dashboard widget tags) will use the new settings.

Figure 28–2   'Social Login and Sharing Settings' Screen
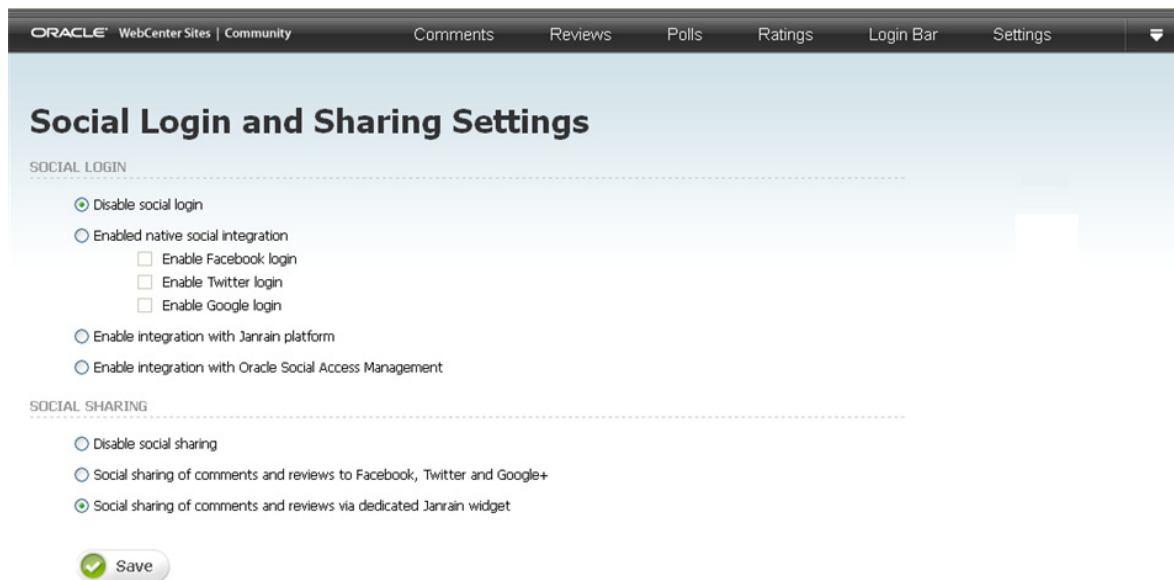
Table 28–1   Reconfiguring the Login Bar

Option	Description
Disable social login	Select this option if you want site visitors to log in to deployed community widgets (as well as any deployed gadgets and/or dashboard widgets) using only the credentials they used to register with your website.

Table 28–1   (Cont.) Reconfiguring the Login Bar

Option	Description
Enable native social integration	If your developers have registered the Community-Gadgets application with Facebook, Twitter, and/or Google, select **Enable native social integration**. This enables Facebook, Twitter, and Google to be used as external identity providers.
	Available only if the Login Bar widget is enabled for native social integration:
	■ **Enable Facebook login** allows visitors to log in to the widgets and gadgets on your website using their Facebook credentials.
	■ **Enable Twitter login** allows visitors to log in to the widgets and gadgets on your website using their Twitter credentials.
	■ **Enable Google login** allows visitors to log in to the widgets and gadgets on your website using their Google account credentials.
	Note: For information about registering the Community-Gadgets application with these external identity providers, see the*Oracle Fusion Middleware WebCenter Sites Developer's Guide*.
Enable integration with Janrain platform	Janrain is a third-party service for social login and social user profile management. If your developers have registered the Community-Gadgets application with the Janrain platform, and you want to allow visitors to log in to the widgets and gadgets on the website using their assigned credentials for any of the social networks supported by the Janrain platform, select the **Enable integration with Janrain platform** radio button.
	Note: If your developers have not registered the Community and Gadgets applications with the Janrain platform, this option will not be available. For information about registering the Community and Gadgets applications with the Janrain platform, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.
Enable integration with Oracle Access Management	If your developers have registered the Community and Gadgets applications with Oracle Access Management (OAM), select **Enable integration with Oracle Access Management**. This allows visitors to log in to deployed widgets or gadgets using credentials for any of the social networks supported by OAM. Once visitors log in to the website, they are automatically logged in to all widgets and gadgets deployed on the website.
	Note: If your developers have not registered the Community and Gadgets applications with Oracle Access Management (OAM), this option will not be available.
	For more information about integrating the Community and Gadgets applications with Oracle Mobile and Social Access Manager, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.
Disable social sharing	Select this option if you do not want to allow site visitors to share comments and reviews with social networks, such as Facebook, Twitter, and Google+.
Social sharing of comments and reviews to Facebook, Twitter, and Google+	Select this option to allow visitors to share the comments and reviews they post about the content of your website to their Facebook, Twitter, and Google+ news feeds.
Social sharing of comments and reviews via dedicated Janrain widget	Select this option if you want to allow visitors to share posted comments and reviews to the social networks supported by the Janrain platform.
	Note: If your developers have not registered the Community application with the Janrain platform, these options will not be available. For information about registering the Community application with the Janrain platform, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

28.3 Deploying a Login Bar Widget Tag

Designers can deploy the Login Bar widget tag with either default or custom settings by selecting **Login Bar** and then **Deploy** in the menu bar. The Login Bar widget tag can be deployed as a standalone widget on a web page or embedded in the tag of another community widget. This section provides instructions for deploying a standalone Login Bar widget tag.

To deploy a standalone login bar widget tag

1. In the menu bar, select **Login Bar**, then select **Deploy**.

   The "Login Bar Deployment" screen opens, shown in Figure 28–3.

Figure 28–3   'Login Bar Deployment' Screen
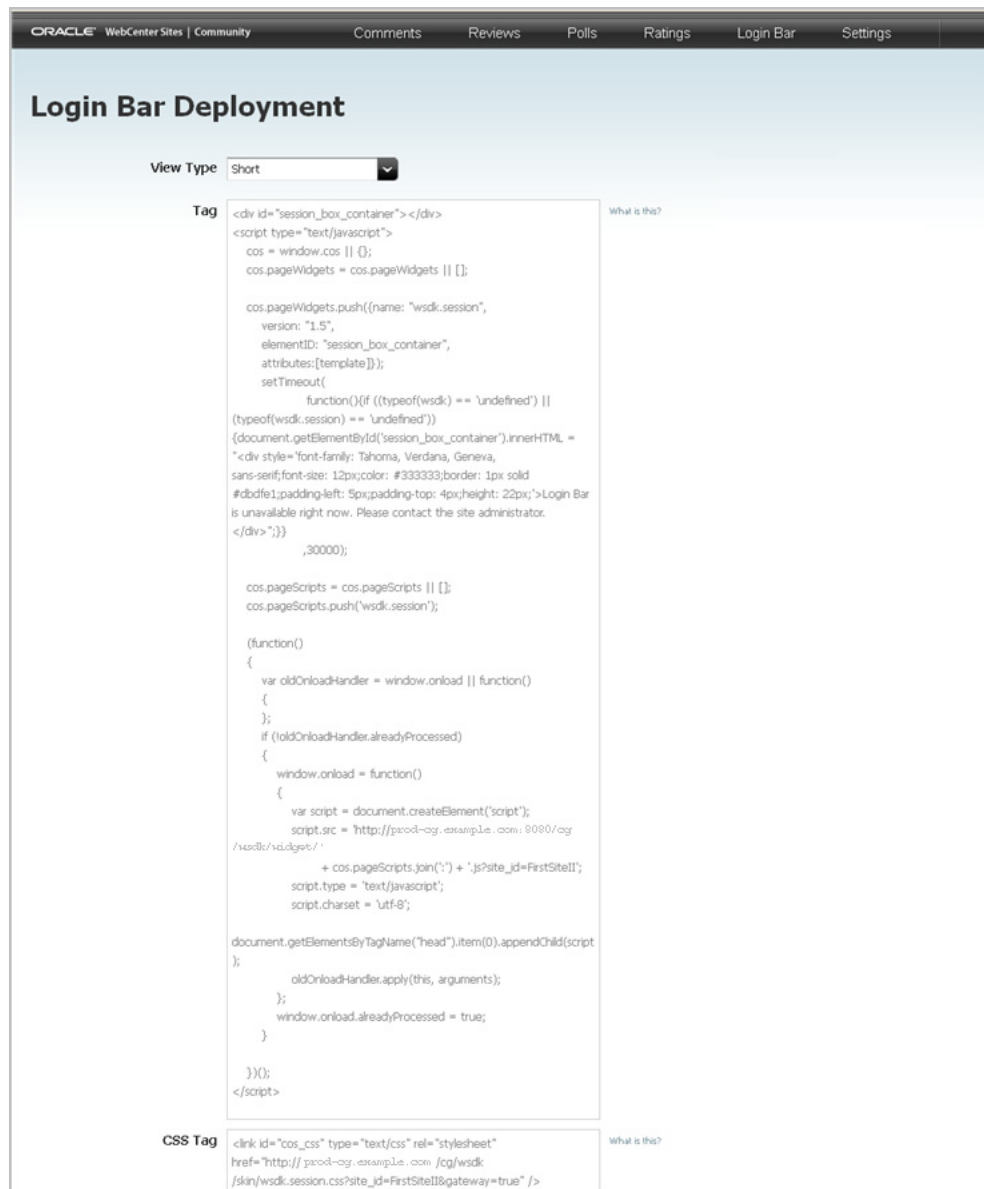
2. If you want to customize this instance of the Login Bar widget tag, use the "View Type" field to select whether a **Short** or **Full** version of the Login Bar widget will be displayed on the website. Select one of the following options:

- **Short** – When a visitor logs in to the website, the Login Bar widget displays the visitor's user name as well as links which enable the visitor to either edit his profile or log out of the website. The website's font styles are automatically applied to this version of the Login Bar widget.

- **Full** – When a visitor logs in to the website, the Login Bar widget will display the visitor's user name and profile picture, along with links that enable the visitor to edit his profile or log out of the website. This version of the Login Bar widget is displayed on the website with default font styles (which are specified in the Login Bar widget tag). The website's font styles are not automatically applied to the Full version of the Login Bar widget.

3. Deploy the widget tag:

a. In the "Tag" field, copy (**Ctrl+C**) the widget tag.

b. Insert the widget tag into the desired template, preview the asset to which the template is assigned, and publish the template to the website. For detailed instructions, see steps 3 – 7 in the Section 24.2, "How Do I Deploy Community Widget Tags?"

29

Working with Polls

This chapter is for designers and provides a quick reference for creating and managing polls and the corresponding poll results.

This chapter contains the following sections:

- Section 29.1, "Overview"
- Section 29.2, "Working with the 'All Polls' Screen"
- Section 29.3, "Creating a New Poll"

29.1 Overview

Figure 29–1   Polls Menu

Polls allow you to survey the visitors of your website about a certain topic. The **Polls** menu (shown in Figure 29–1) is used to create Poll widgets and related Results widgets. The Polls menu provides you with options to moderate and reconfigure existing polls, and create new polls widgets which you can then deploy to a web page.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In".

29.2 Working with the 'All Polls' Screen

The "All Polls" screen (shown in Figure 29–2) can be accessed by selecting **Polls, All Polls** in the menu bar. The All Polls screen is used to view existing polls and their results as well as to reconfigure, preview, and deploy poll widgets by using the quick action menu associated with each poll listed in the screen.

Figure 29–2   'All Polls' Screen
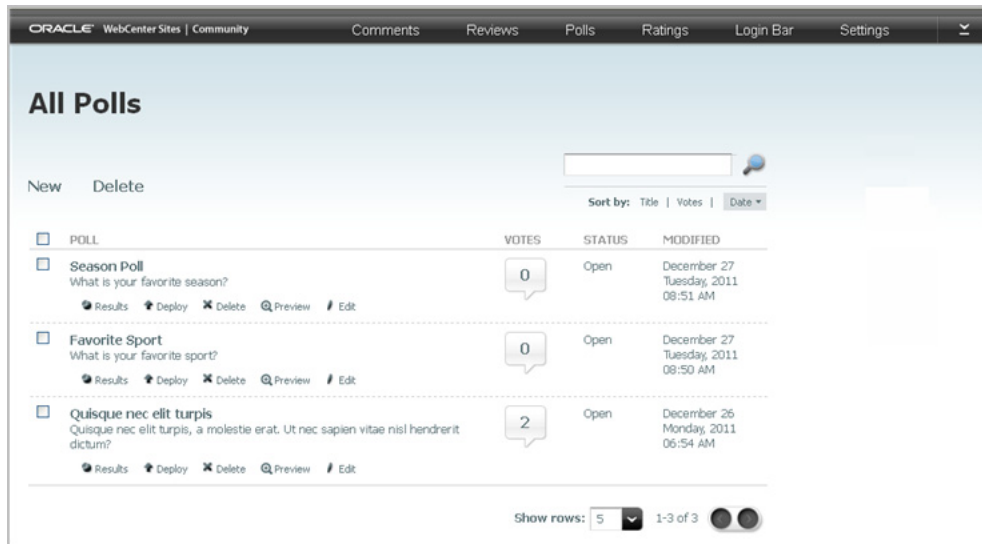
Table 29–1   Working with the "All Polls" screen

Action	Instructions
View the results of a deployed poll	**1.** Navigate to the poll whose results you wish to view. **2.** In the poll's quick action menu, click **Results**. A pop-up window opens displaying the results of the poll.
Deploy the polls widget tags	**1.** Navigate to the poll you wish to deploy. **2.** In the poll's quick action menu, click **Deploy**. The "Deploy Poll Name Poll" screen opens. This screen allows you to deploy the following tags: **Poll Tag** – The main polls widget tag which contains all configured options for a particular poll. Deploying this tag on a web page displays the poll to visitors, who can then participate in voting. If the "Show Results" field is set to **Yes** (Section 29.3, "Creating a New Poll"), the widget displays a summary of the poll's results to visitors after they submit their vote for that poll. **Results Tag** – The polls summary widget tag which displays only a summary of the main poll's results. When this widget tag is deployed, the results it displays dynamically change with each poll vote. **3.** Copy (**Ctrl**+**C**) the code in the "Poll Tag" and/or the "Results Tag" fields. **4.** Insert the widget tag into the desired asset's template, preview the asset, and publish the template to the website. For detailed instructions, see steps 3 – 7 in the Section 24.2, "How Do I Deploy Community Widget Tags?."

Table 29–1   (Cont.) Working with the "All Polls" screen

Action	Instructions
Delete a poll	**1.** Navigate to the poll you wish to delete.
	2. In the poll's quick actions menu, click **Delete**.
	3. In the confirmation box, click **OK**.
	The poll is removed from the Community interface.
	Note: If the poll you deleted is currently deployed on a page, the poll widget will display a message stating that the poll is currently unavailable. To remove the poll widget from the page, you must remove the poll's widget tag from the template used to render that web page's content.
Preview a poll	**1.** Navigate to the poll you wish to preview.
	2. In the poll's quick action menu, click **Preview**.
	A pop-up window opens and displays a preview of the poll.
Modify an existing poll	**1.** Navigate to the poll you wish to modify.
	2. In the poll's quick action menu, click **Edit**.
	The "Edit Poll" screen is displayed.
	3. Make the desired changes. For field definitions, see Table 29–2.
	4. Click **Save**.
	The modified poll is displayed in the "All Polls" screen and on the web page on which it is deployed.

29.3 Creating a New Poll

Designers can create a new poll by selecting **Polls**, and then **Create a New Poll** from the menu bar, which opens the "Create a New Poll" screen (shown in Figure 29–3). Once you save the poll, it is listed in the "All Polls" screen (select **Polls**, and then select **All Polls**).

Figure 29–3   'Create a New Poll' Screen

Table 29–2   Creating a Poll

Section	Field	Description
Questions/Answers	Poll Title	Enter a title for the poll.
Questions/Answers	Poll Question	Enter the question you want to ask site visitors.

Table 29–2   (Cont.) Creating a Poll

Section	Field	Description
Questions/Answers	Answer *n*	Enter the answer options from which you want visitors to choose.
		■ To include additional choices, click **Add Answer**.
		■ To remove an answer, click the **X** icon next to the answer you wish to remove.
		■ To change the color of an answer option when it is shown in the poll's results summary, enter the hex number of the desired color into the Hex # field, located next to the desired answer.
Configure Results	Show Results	Select **Yes** to display a summary of the poll's results after a user submits an answer to the main poll. Select **No** to display only the main poll and its answer options.
Configure Results	Graph Type	If you selected **Yes** in the "Show Results" field, specify the type of graphical representation in which the poll's results summary will be displayed. Select one of the following:
		■ **Pie Chart** – Displays the poll results in a pie chart format.
		■ **Bar Chart** – Displays the poll results in a bar chart format.
		■ **Flat Results** – Displays the poll results in a list, as flat text without any graphics. The percentage of visitors who voted for each answer is displayed next to the corresponding answer.
Configure Results	Results View	Specify whether poll results will be displayed in a pop-up window (**Popup**) or alongside the poll widget (**In-Site**).
		Note: This field is available only if you selected **Yes** in the "Show Results" field.
Configure Results	Results Popup Width, px	Specify the width of the results pop-up window. The width must be at least `300 px`.
		Note: This field is available only if you selected **Yes** in the Show Results field and **Popup** in the "Results View" field.
Configure Results	Thank You Note	If you selected **Yes** in the "Show Results" field, enter a thank you note that will be displayed to site visitors when they participate in the poll.
Configure Results	Include Disclaimer	Select either **Yes** or **No** to specify whether a disclaimer will be displayed to visitors.
		Note: This field is available only if you selected **Yes** in the "Show Results" field.
Configure Results	Disclaimer	If you selected **Yes** in the "Include Disclaimer" field, enter the disclaimer text you wish to display to visitors. When the polls widget is deployed, the disclaimer is displayed beneath the poll's question and answers.
		Note: This field supports plain text and basic HTML tags. You can use HTML tags to control the appearance of your disclaimer

Table 29–2   (Cont.) Creating a Poll

Section	Field	Description
Common	Poll Status	This field allows you to manually open and close the poll. Select either: ■ **Open** – visitors can participate in the poll. ■ **Closed** – visitors cannot submit votes.
Common	Poll Closure Date	Click in this field to render the date picker. Specify the date the poll will close (votes can no longer be submitted). If you do not wish to specify a closure date for the poll, leave this field blank. **Note:** If you do not wish to use the date picker, you can enter a date using the format *dd-mm-yyyy* (for example, 02-04-2011).
Common	Theme	Specify the appearance of the polls widget as it will be displayed on the web page. You can select one of the following: ■ **Basic** – Displays the poll title at the top of the widget. The question is displayed below the title and the available answers are displayed below the question. ■ **Advanced** – Displays the poll title in a grey two-toned title bar at the top of the widget. The question is displayed below the title in a blue background, and the available answers are displayed below the question. ■ **No Design** – Displays only the poll question and its available answers, without a frame or border around them. ■ **Open Design** – Displays the poll question and its available answers in an open source style design.

30

Configuring Community Widget Settings

This chapter provides a quick reference for reconfiguring settings that apply to all community widgets (to which the settings are applicable) of a given site.

This chapter contains the following sections:

- Overview
- Working with the 'Settings' Menu

30.1 Overview

Figure 30–1   Settings Menu
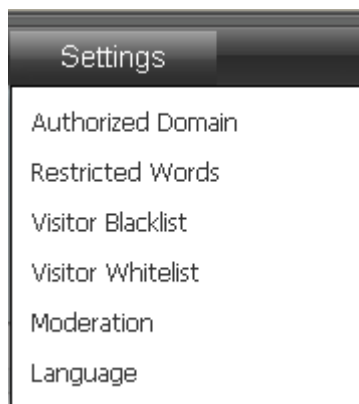
The **Settings** menu (shown in Figure 30–1) is used to configure moderation and security settings for the entire site and all widget tags. Configuring general community widget settings includes applying automatic moderation filters (Restricted Words, Visitor Blacklist, and Visitor Whitelist) to assist in the moderation process and protecting your widget tags from unauthorized deployment. Once you save these settings, the system dynamically updates all widget tags in the Community interface and on pages where tags are deployed.

The instructions in this section are written as a quick reference and it is assumed you are already logged in to the Community interface. If you need instructions for logging in, see Section 24.1, "Logging In."

30.2 Working with the 'Settings' Menu
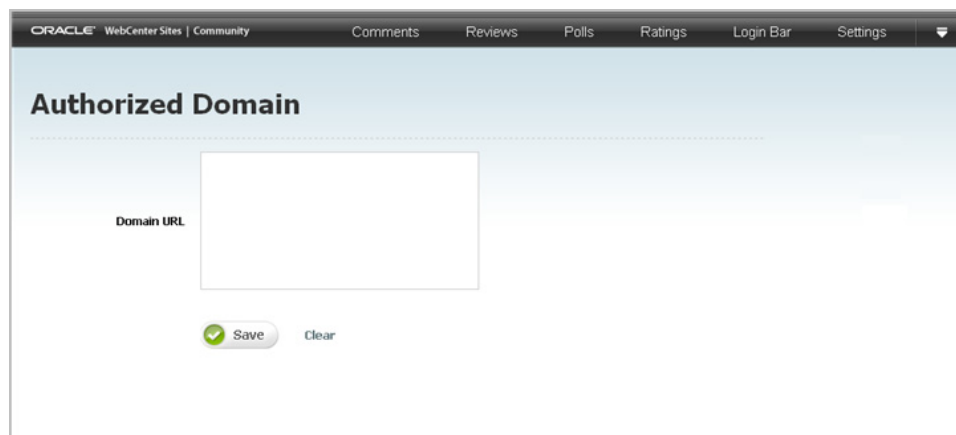
This section is for all Community application users. You can reconfigure general settings for community widgets (to which the settings are applicable) in the following ways:

- Working with the Authorized Domain Screen

- Working with the Restricted Words Screen

- Working with the Visitor Blacklist Screen

- Working with the Visitor Whitelist Screen

- Working with the Moderation Screen

- Working with the Language Screen

30.2.1 Working with the Authorized Domain Screen

Designers can access the "Authorized Domain" screen (shown in Figure 30–2) by selecting **Settings** and then **Authorized Domain**. The "Authorized Domain" screen is used to protect all deployed tags from unauthorized use. Authorizing a domain enables you to specify the domain on which community widget tags can be deployed. This restricts the usage of the tags to only the specified domain.

Figure 30–2   'Authorized Domain' Screen

Table 30–1   Authorizing a Domain

Field	Description
Domain URL	Enter the domain name of the site(s) on which you wish to display community widgets.
	For example:
	`www.mycompany.com or www.mysite.mycompany.com`
	To specify the domain name of multiple sites, separate each domain name with a comma. For example:
	`www.mycompany.com, www.mycompany2.com,` `www.mycompany3.com, *.mycompany.com`
	Widgets can be rendered only on the specified domain(s) and sub-domain(s). If a visitor views the source code of your company's site, and attempts to copy and deploy the widget tags to his own site, the deployment will fail.
	Note: This field is optional. If you do not wish to specify a domain on which widget tags can be deployed, leave this field blank.

30.2.2 Working with the Restricted Words Screen

Moderators can access the "Restricted Words" screen (shown in Figure 30–3) by selecting **Settings** and then **Restricted Words**. The "Restricted Words" screen is used to upload a word filter file, which will prevent the publication of comments and reviews containing words that are listed in the file. The comments and reviews will be marked as **Inappropriate** and will await approval by a moderator in the Community interface.

Figure 30–3   'Restricted Words' Screen

> **Note:**   The Community application provides a default word filter that searches for partial matches to the words specified in the uploaded word filter file. To enable the word filter to search for these words, you will have to enable auto moderation against restricted words (Section 30.2.5, "Working with the Moderation Screen").

Table 30–2 Configuring the Restricted Words Filter

Field	Description
Upload filter	Click **Browse** to upload a filter file. The size of the file you are uploading can be no more than 100KB, the file must be in `.txt` format, and each word contained in the file must be on its own line.
	Note: When you upload a filter file and save it to the Community interface, the file is renamed `word_filter.txt`.

30.2.3 Working with the Visitor Blacklist Screen

Moderators can access the "Visitor Blacklist" screen (shown in Figure 30–4) by selecting **Settings** and then **Visitor Blacklist**. The "Visitor Blacklist" is used to prevent certain visitors' comments, reviews, and ratings from being displayed on the website without going through the moderation process. Moderators must manually moderate all comments, reviews, and ratings posted by blacklisted visitors.

> **Note:** To automatically mark comments, reviews, and ratings posted by blacklisted visitors as inappropriate, you will have to enable auto-moderation against the visitor blacklist (see Section 30.2.5, "Working with the Moderation Screen").

Figure 30–4 'Visitor Blacklist' Screen

> **Note:** If you are blacklisting anonymous visitors, you will need their IP addresses. A visitor's IP address is located next to each of his comments, reviews, and ratings listed in the Community interface.
>
> To obtain a visitor's IP address:
>
> 1. Access either the All Comments, All Reviews, or All Ratings screen.
>
> 2. Navigate to the comment, review, or ratings posted by the anonymous visitor you wish to add to the blacklist. The visitor's IP address is listed under the Author column, next to his comment or review.

Table 30–3   Configuring the Visitor Blacklist

Action	Instructions
Adding authenticated visitors to the "Visitor Blacklist"	1. Click the **Add Visitors** link. The "Add Visitors to Blacklist" screen opens.
	2. In the **Available** list box, select the names of the visitors you wish to blacklist and move them to the **Selected** list box. (To search for a specific visitor, type his name in the **Filter List** field. The results appear in the **Available** list box.)
	3. (Optional) In the **Reason** field, enter the reason for blacklisting the visitors.
	4. Click **Save**.
	The visitors' names are now listed in the "Visitor Blacklist" screen.
Adding an anonymous visitor to the "Visitor Blacklist"	1. Click the **Add IP Address** link.
	The "Add IP Address" screen opens.
	2. Fill in the following fields:
	IP – Enter the visitor's IP address.
	Reason (Optional) – Enter the reason for blacklisting the visitor.
	3. Click **Save**.
	The visitor's IP address is now listed in the "Visitor Blacklist" screen.
Removing visitors from the "Visitor Blacklist"	1. Select the checkboxes of the visitors you wish to remove from the blacklist.
	2. Click the **Remove** link. The visitors' names are removed from the "Visitor Blacklist" screen.

30.2.4 Working with the Visitor Whitelist Screen

Moderators can access the "Visitor Whitelist" screen (shown in Figure 30–5) by selecting **Settings** and then **Visitor Whitelist**. The "Visitor Whitelist" screen is used to allow authenticated visitors to post comments and reviews without requiring approval. This means that once a visitor is added to the whitelist, all of the visitor's posts are automatically approved and displayed on the website (even if manual moderation is enabled).

> **Note:**   To automatically approve all comments and reviews posted by whitelisted visitors, you will have to enable the **Pre-publish against Visitor Whitelist before manual approval** checkbox in the "Moderation Settings" screen (see Section 30.2.5, "Working with the Moderation Screen").

Figure 30–5   'Visitor Whitelist' Screen
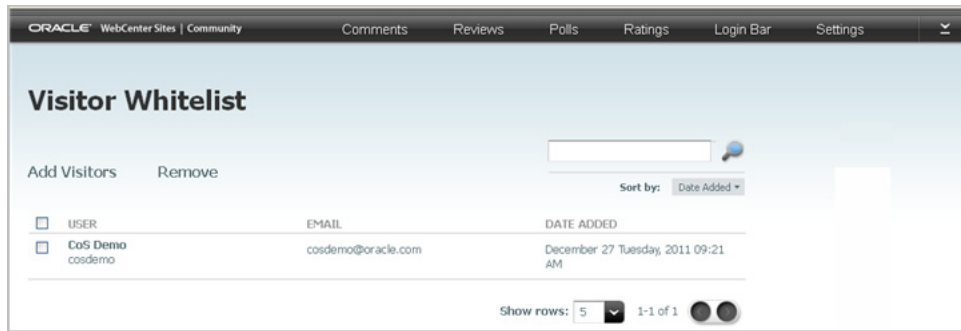
> **Note:**   Only authenticated visitors can be added to the visitor whitelist.

Table 30–4   Configuring the Visitor Whitelist

Action	Instructions
Adding authenticated visitors to the "Visitor Whitelist"	**1.** Click the **Add Visitors** link. The "Add Visitors to Whitelist" screen opens. **2.** In the **Available** list box, select the names of the visitors you wish to add to the whitelist and move them to the **Selected** list box. (To search for a specific visitor, type his name in the **Filter List** field. The results appear in the **Available** list box.) **3.** Click **Save**. The visitors' names are now listed in the "Visitor Whitelist" screen.
Removing visitors from the "Visitor Whitelist"	**1.** Select the checkboxes of the visitors you wish to remove from the whitelist. **2.** Click the **Remove** link. The visitors' names are removed from the "Visitor Whitelist" screen.

30.2.5 Working with the Moderation Screen

Moderators can access the "Moderation Settings" screen (shown in Figure 30–6) by selecting **Settings** and then **Moderation**. The "Moderation Settings" screen is used to specify the following options:

- Enable manual or automatic moderation. Allow comments, reviews, and ratings to be either passed through the moderation process or automatically approved and displayed on the website.

- Apply the auto-moderation filters to assist in the moderation process. The filters for auto-moderation are Restricted Words, Visitor Blacklist, and Visitor Whitelist.

  For information, see Section 30.2.2, "Working with the Restricted Words Screen," Section 30.2.3, "Working with the Visitor Blacklist Screen," and Section 30.2.4, "Working with the Visitor Whitelist Screen."

- Choose to auto-moderate reviews and ratings by the rating a site visitor gives to a topic.

■ Specify whether visitors can assist in the moderation process by allowing them to flag comments and reviews posted to the pages of the website. Also, specify which visitors (authenticated or all) can flag comments and reviews.

Figure 30–6 'Moderation Settings' Screen

Table 30–5   Configuring Moderation Settings for Widgets

Field	Description
Manual Moderation	Enables you to control whether comments and reviews will be automatically approved or manually moderated before being approved. If manual moderation is enabled, all posted comments and reviews are displayed in the Community interface with a status of **Pending** until they are manually approved by a moderator.
	You can also choose to enable the "Visitor Whitelist" filter. When applied, it approves all comments, reviews, and ratings posted by whitelisted visitors.
Auto-Moderation	Enables you to apply the "Restricted Words" and/or "Visitor Blacklist" filters. When these filters are applied, they mark as **Inappropriate** all comments and reviews that contain prohibited words (Restricted Words) and all comments, reviews, and ratings posted by blacklisted visitors (Visitor Blacklist).
	You can also choose to automatically moderate reviews by the rating the site visitor who posted them gives to the topic. When enabled, any review posted with a rating of 2 stars or less is automatically marked as **Inappropriate**.
Flagging By Visitors	Enables you to control site visitor flagging capabilities for approved comments and reviews.

30.2.6 Working with the Language Screen

Designers can access the "Language" screen (shown in Figure 30–7) by selecting **Settings** and then **Language**. The "Language" screen enables you to specify the language in which deployed community widgets will be displayed.

Figure 30–7   'Language' Screen

Table 30–6   Languages of the Deployed Widgets

Field	Description
Language	Click the down-arrow to display the Language drop-down menu. Select the language in which all deployed community widgets will be displayed.
	The available options are:
	■ **English**
	■ **Brazilian Portuguese**
	■ **Simplified Chinese**
	■ **Traditional Chinese**
	■ **French**
	■ **German**
	■ **Italian**
	■ **Japanese**
	■ **Korean**
	■ **Spanish**
	Note: If the desired language is not listed, contact your WebCenter Sites administrator or developers. For instructions about adding language options to this list, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

31

Testing Deployed Community Widget Tags

This chapter provides you with instructions for verifying deployed community widget functionality.

This chapter contains the following sections:

- Section 31.1, "Sample Site with Community Widgets Deployed"
- Section 31.2, "Working with Comments and Reviews Widgets as an Authenticated Visitor"
- Section 31.3, "Working with Comments and Reviews Widgets as an Anonymous Visitor"
- Section 31.4, "Sorting Comments and Reviews"
- Section 31.5, "Flagging Inappropriate Posts"
- Section 31.6, "Replying to Posted Comments"
- Section 31.7, "Viewing Rating Details for Stars Ratings Widgets"
- Section 31.8, "Ranking Visitor Comments and Reviews"
- Section 31.9, "Sharing Comments and Reviews with Facebook, Twitter, and Google+"
- Section 31.10, "Creating and Sharing a Permalink"
- Section 31.11, "Working with Ratings Widgets"
- Section 31.12, "Working with Poll Widgets"

31.1 Sample Site with Community Widgets Deployed

Figure 31–1 is an example of a web page on which a Comments widget tag is deployed. In this example, the Comments widget displays the **Post a Comment** link, which visitors can click to display the "Comment" field and/or the **Login** and **Register** links.

If moderators have configured the visitor permissions to allow anonymous visitors to post comments to the website, the comment field is displayed when you click the **Post a Comment** link. If the widget's visitor permissions are configured to allow only authenticated visitors to post comments, then visitors must log in to see the comment field.

Figure 31–1 Sample Web Page with Deployed Widgets

31.2 Working with Comments and Reviews Widgets as an Authenticated Visitor

This section provides instructions for logging in to the website on which community widget tags are deployed, and working with the widgets as an authenticated visitor.

> **Note:** The permissions authenticated visitors have to community widgets are determined by the configurations made to the widget tags in the Community interface. Therefore, certain instructions in this section may not be applicable to you.

This section contains the following topics:

- Section 31.2.1, "Logging in to the Site as an Authenticated Visitor"

- Section 31.2.2, "Posting Comments as an Authenticated Visitor"

- Section 31.2.3, "Posting Reviews as an Authenticated Visitor"

- Section 31.2.4, "Working with Comments as an Authenticated Visitor"

- Section 31.2.5, "Working with Reviews as an Authenticated Visitor"

31.2.1 Logging in to the Site as an Authenticated Visitor
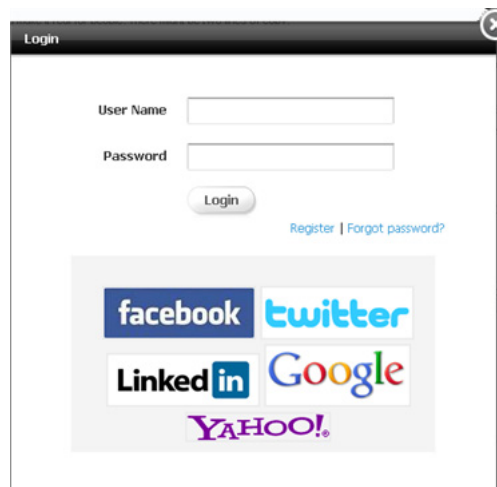
Logging in actuates the permissions and settings for authenticated visitors that were configured for the community widget tags in the Community interface.

To log in to the site

1. Access the web page on which community widget tags are deployed.

2. Log in to the website.

   – If the Login Bar is a standalone widget, navigate to the Login Bar widget and click the **Login** link.

   – If the Login Bar is embedded in the tag of the Comments or Reviews widget, navigate to the Comments or Reviews widget and click either **Post a comment** or **Post a review**. Then click **Login**.

   Log in using your assigned credentials. Log in credentials are case-sensitive.

Figure 31–2   Community Widget Login Window

> **Note:**   If the Login Bar widget is configured to allow visitors to log in using credentials for third-party websites, visitors can log in to the website with credentials for social networks such as Facebook.

3. Click **Login**.

   The "Comment" or "Review" field is displayed, as shown in Figure 31–3:

Figure 31–3   'Comment' and 'Review' Fields

4. Now that you are logged in, you can verify that the community widgets are configured with the appropriate permissions and moderation settings for authenticated visitors.

31.2.2 Posting Comments as an Authenticated Visitor

To determine whether the commenting permissions and moderation settings configured for authenticated visitors are deployed successfully, log in to the site and post a comment.

To post a comment as an authenticated visitor

1. Access a web page on which a Comments widget is deployed.

2. Log in to the website with your assigned credentials.

   The "Comment" field is displayed, as shown in Figure 31–4:

Figure 31–4   'Comment' Field
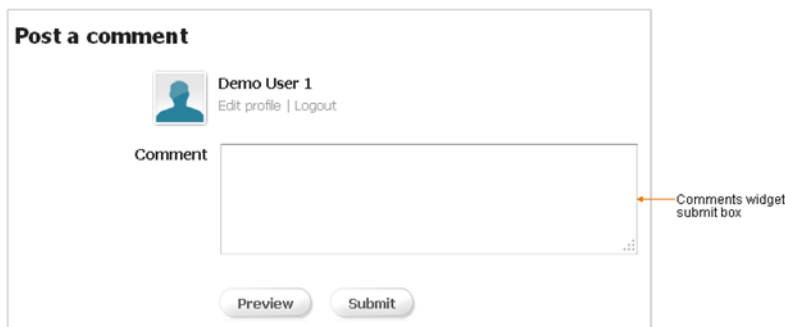
3. In the Comment field, enter your comment.

4. (Optional) Click **Preview** to preview your comment before posting it to the website.

Figure 31–5   Preview of a Comment

5. Click **Submit**.

    ■   If pagination is enabled, and the sort order is **Oldest at the top** (specified in the Comments Appearance screen), the comment you posted is displayed as the last comment on the first page. This enables you to view the comment you just posted. Refreshing the page will place the comment in the appropriate order. For more information, see Section 25.3.1, "Reconfiguring the Comments Widgets' Appearance Settings."

    ■   The site's moderation settings (select **Settings** and then **Moderation**) determine whether an authenticated visitor's comment is automatically approved and displayed on the website, or if all comments must be manually approved before they are displayed on the website. For information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

    ■   If the comment is posted by a blacklisted visitor, then the comment must be manually approved before it is displayed to other visitors on the website. The comment is marked with a status of **Inappropriate** in the Community interface. For information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

    ■   If the comment is posted by a whitelisted visitor, then the comment is automatically approved and displayed on the website. For information about the Visitor Whitelist, see Section 30.2.4, "Working with the Visitor Whitelist Screen."

31.2.3 Posting Reviews as an Authenticated Visitor

To determine whether the reviewing permissions and moderation settings configured for authenticated visitors are deployed successfully, log in to the site and post a review.

To post a review as an authenticated visitor

1. Access the web page on which the Reviews widget is deployed.

2. Log in to the website with your assigned credentials.

    The "Review" field is displayed, as shown in Figure 31–6:

Figure 31–6 'Review' Field

3. Fill in the fields. The fields you see are determined by the configurations made to the Reviews widget tag before deployment:

    ■   **Rating** field – Rate the topic by clicking the desired amount of stars.

    ■   **Title** field – Enter a title for your review. The title will be displayed above the content of your review.

    ■   **Review** field – Enter the content of your review in this field.

4. (Optional) Click **Preview** to preview your review before posting it to the website.

Figure 31–7   Preview of a Review
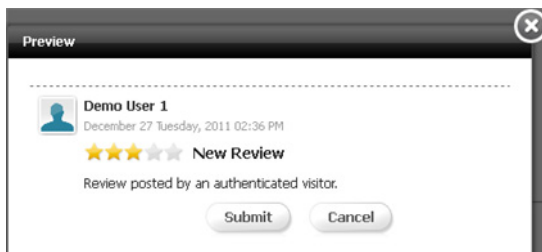
5. Click **Submit**.

    ■   If pagination is enabled, and the sort order is **Oldest at the top** (specified in the Reviews Appearance screen), the review you post is displayed as the last review on the first page. This enables you to view the review you just posted. Refreshing the page will place the review in the appropriate order. For more information, see Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings."

    ■   The site's moderation settings determine whether an authenticated visitor's review is automatically displayed on the website, or if all reviews must be manually approved before they are displayed on the website. For information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

    ■   If the review is posted with a low rating (two stars or less), and the moderation settings are set to mark all reviews given a rating of two stars or less as **Inappropriate**, then the review is marked with a status of **Inappropriate** in the Community interface and must be manually approved before it is displayed on the website.

- If the review is posted by a blacklisted visitor, then the review must be manually approved before it is displayed on the website. The review is marked with a status of **Inappropriate** in the Community interface. For information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

- If the review is posted by a whitelisted visitor, then the review is automatically approved and displayed on the website. For information about the Visitor Whitelist, see Section 30.2.4, "Working with the Visitor Whitelist Screen."

31.2.4 Working with Comments as an Authenticated Visitor

The actions authenticated visitors can perform on comments displayed on the website are determined by the visitor permissions, appearance settings, and moderation settings configured for the Comments widget tag.

This section contains the following:

- Section 31.2.4.1, "Modifying Comments on the Website"
- Section 31.2.4.2, "Deleting Comments from the Website"

31.2.4.1 Modifying Comments on the Website

If the Comments widget is configured to enable authenticated visitors to modify the comments they post, then authenticated visitors can modify their own comments directly on the website.

To modify a comment on the website

1. Access the web page on which you posted the comment and log in with your assigned credentials.

2. Mouse over the comment you wish to modify. In the menu that appears, click **Edit** (shown in Figure 31–8).

Figure 31–8   'Edit' Link Displayed Under a Posted Comment

3. In the "Edit" box, modify the comment.

Figure 31–9   'Edit' Dialog Box Displaying the 'Comment' Field

4. (Optional) Click **Preview** to preview how the modified comment will look on the website.

5. Click **Submit**.

The site's moderation settings determine whether the modified comment is automatically approved and displayed on the website, or if it must be manually approved before being displayed. For information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

31.2.4.2 Deleting Comments from the Website

If the Comments widget tag is configured to enable authenticated visitors to delete the comments they post, then authenticated visitors can delete their own comments directly from the website.

To delete a comment from the website

1. Access the web page on which you posted the comment and log in with your assigned credentials.

2. Mouse over the comment you wish to delete. In the menu that appears, click **Delete** (shown in Figure 31–10).

Figure 31–10 'Delete' Link Displayed Under a Posted Comment

This graphic shows a comment that is approved and displayed on the web page on which a Comments widget tag is deployed. Underneath the content of the comment is a **Delete** link which enables the visitor who posted the comment to delete the comment from the website (and from the Community interface).

****

3. Click **Yes** to delete the comment.

Figure 31–11 Delete Comment: Confirmation Box

The comment is deleted from both the website and the Community interface.

31.2.5 Working with Reviews as an Authenticated Visitor

The actions authenticated visitors can perform on reviews displayed on the website are determined by the visitor permissions, appearance settings, and moderation settings configured for the Reviews widget tag.

This section contains the following topics:

- Section 31.2.5.1, "Modifying Reviews on the Website"

- Section 31.2.5.2, "Deleting Reviews from the Website"

31.2.5.1 Modifying Reviews on the Website

If the reviews widget tag is configured to enable authenticated visitors to modify the reviews they post, then authenticated visitors can modify their own reviews directly on the website.

To modify a review on the website

1. Access the web page on which you posted the review and log in with your assigned credentials.

2. Mouse over the review you wish to modify. In the menu that appears, click **Edit** (shown in Figure 31–12).

Figure 31–12   'Edit' Link Displayed Under a Posted Review
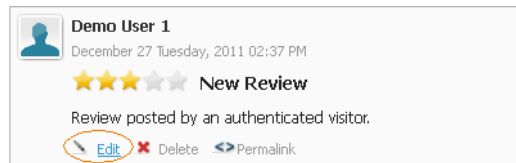
3. Modify the content in the desired fields.

Figure 31–13   'Edit' Dialog Box Displaying the 'Title' and 'Review' Fields
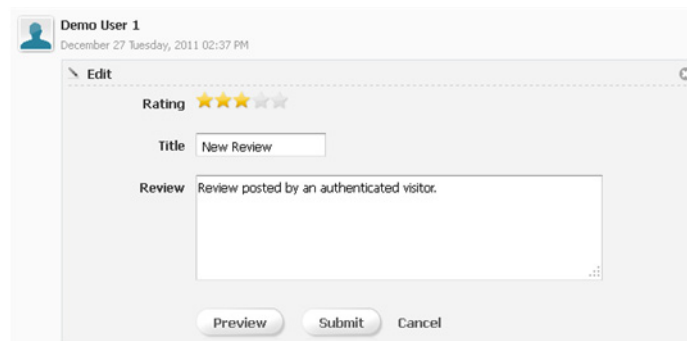
4. (Optional) Click **Preview** to preview how the modified review will look on the website.

5. Click **Submit**.

   The site's moderation settings determine whether the modified review is automatically approved and displayed on the website, or if it must be manually approved before being displayed on the website. For information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

31.2.5.2 Deleting Reviews from the Website

If the Reviews widget tag is configured to enable authenticated visitors to delete their own reviews, then authenticated visitors can delete their own reviews directly from the website.

To delete a review from the website

1. Access the web page on which you posted the review you wish to delete, and log in with your assigned credentials.

2. Mouse over the review you wish to delete. In the menu that appears, click **Delete** (shown in Figure 31–14).

Figure 31–14   'Delete' Link Displayed Under a Posted Review
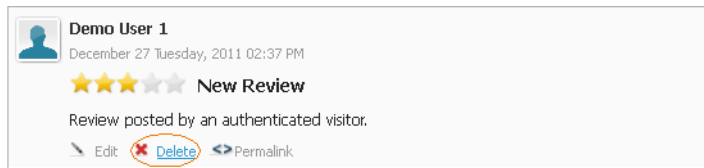
3. Click **Yes** to delete the review.

Figure 31–15   Delete Review: Confirmation Box
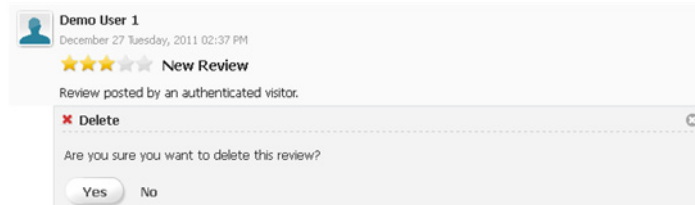
The review is deleted from both the website and the Community interface.

31.3 Working with Comments and Reviews Widgets as an Anonymous Visitor

This sections provides instructions for working with community widgets as an anonymous visitor. The actions you can perform as an anonymous visitor are determined by the configurations made to the community widget tags in the Community interface.

This section contains the following topics:

- Section 31.3.1, "Posting Comments as an Anonymous Visitor"
- Section 31.3.2, "Posting Reviews as an Anonymous Visitor"

31.3.1 Posting Comments as an Anonymous Visitor

To ensure that the commenting permissions (configured in the "Commenter Permissions" screen) for anonymous visitors are configured and deployed successfully, post a comment to the website as an anonymous visitor.

To post a comment as an anonymous visitor

1. Access the web page on which the Comments widget tag is deployed.

2. Navigate to the "Comments" section and click the **Post a Comment** link.

If anonymous visitors can post comments, a "Post a comment" field is displayed (as shown in Figure 31–16):

Figure 31–16   'Post a comment' Field

3. Fill in the required fields. The fields you see are determined by the configurations made to the Comments widget tag in the Community interface:

   ■   **Name** and **Email** fields – If a name or email address is required, enter your information into the field(s) provided.

   ■   **Comment** field – Enter the content of your comment.

4. Click **Submit**.

   ■   If pagination is enabled, and the sort order is **Oldest at the top** (specified in the Comments Appearance screen), the comment you post is displayed as the last comment on the first page. This enables you to view the comment you just posted. Refreshing the page will place the comment in the appropriate order. For more information, see Section 25–5, "'Comments Appearance' Screen."

   ■   The site's moderation settings determine whether all comments are automatically approved and displayed on the website, or if comments posted by anonymous visitors must be manually approved before they are displayed on the website. For information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

   ■   If the comment is posted by an anonymous visitor whose IP address is blacklisted, then the comment must be manually approved before it is displayed on the website. The comment is marked with a status of **Inappropriate** in the Community interface. For information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

31.3.2 Posting Reviews as an Anonymous Visitor

To ensure that the reviewing permissions for anonymous visitors are configured and deployed successfully, post a review to the website as an anonymous visitor.

To post a review as an anonymous visitor

1. Access a web page on which the Reviews widget tag is deployed.

2. Navigate to the "Reviews" section of the page and click the **Post a Review** link.

Figure 31–17   'Post a review' Field

3. In the "Post a review" field, fill in the required fields. The fields you see are determined by the configurations made to the Reviews widget tag in the Community interface:

   ■ **Name** and **Email** fields – If a name and/or email address is required, enter your information into the field(s) provided.

   ■ **Rating** field – Rate the topic you are reviewing by clicking the desired amount of stars.

   ■ **Title** field – Enter a title summarizing the content of your review.

   ■ **Review** field – Enter the content of your review.

4. Click **Submit**.

   ■ If pagination is enabled, and the sort order is **Oldest at the top** (specified in the Reviews Appearance screen), the review you post is displayed as the last review on the first page. This enables you to view the review you just posted. Refreshing the page will place the review in the appropriate order. For more information, see Section 26.3.1, "Reconfiguring the Reviews Widgets' Appearance Settings."

   ■ The site's moderation settings determine whether all reviews are automatically approved and displayed on the website, or if reviews posted by anonymous visitors must be manually approved before being displayed on the website. For more information about configuring moderation settings, see Section 30.2.5, "Working with the Moderation Screen."

   ■ If the review is posted with a low rating (two stars or less), and the moderation settings are set to mark all reviews given a rating of two stars or less as **Inappropriate**, then the review is marked with a status of **Inappropriate** in the Community interface and must be manually approved before it is displayed on the website.

   ■ If the review is posted by an anonymous visitor whose IP address is blacklisted, then the review must be manually approved before it is displayed on the website. The review will be marked with a status of **Inappropriate** in the Community interface. For information about the Visitor Blacklist, see Section 30.2.3, "Working with the Visitor Blacklist Screen."

31.4 Sorting Comments and Reviews

When browsing comments (or reviews) on a web page, you can choose the order in which the comments (or reviews) are displayed.

To sort comments (or reviews)

1. Access a web page on which the Comments (or Reviews) widget tag is deployed.

2. Navigate to the Comments (or Reviews) widget. Click the **Sort by** drop-down menu, and select one of the following options:

   - **Newest at the top –** Displays the most recently posted comments or reviews at the top of the list.

   - **Oldest at the top –** Displays the least recent comments or reviews at the top of the list.

   - **Most ranked at the top –** Displays the comments or reviews that site visitors rate frequently at the top of the list.

   - **Least ranked at the top** – Displays the comments or reviews that site visitors rate the least at the top of the list.

   The comments (or reviews) are displayed in the order you specify.

31.5 Flagging Inappropriate Posts

If a comment or review contains inappropriate or inaccurate content, visitors can assist in the moderation process by flagging that particular post. The type of visitors (authenticated and anonymous) who can flag comments and reviews is determined by the flagging permissions configured in the Community interface.

To flag a comment or review on the website

1. Access the web page on which the comment (or review) you wish to flag is displayed.

2. If you are an authenticated visitor, log in using your assigned credentials. If you are an anonymous visitor, skip to step 3.

3. Mouse over the comment (or review) that contains the inappropriate or inaccurate content, and click **Flag** (as shown in Figure 31–18).

Figure 31–18   'Flag' Link Displayed Under a Posted Comment and Review
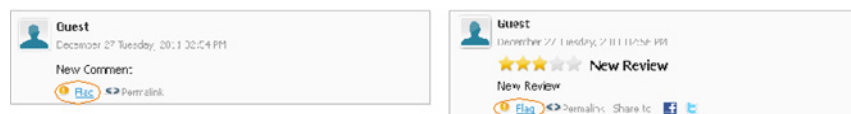
4. In the "Flag Content" box, click **Flag**.

Figure 31–19   'Flag Content' Dialog Box
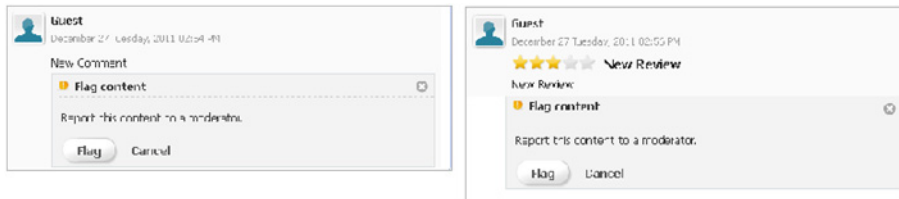
You have successfully flagged the comment (or review). Once a moderator accesses the Community interface, he will see **Flagged** next to the approved post's status, and can then take the appropriate actions to either remove or edit the post.

31.6 Replying to Posted Comments

If the comments widget tag is configured to support a threaded commenting structure, then visitors can post replies to comments that are displayed on the website. The type of visitors (authenticated and anonymous) who can reply to comments is determined by the visitor permissions configured in the Community interface.

To reply to a comment

1. Access the web page that contains the comment to which you wish to post a reply.

2. If you are an authenticated visitor, log in with your assigned credentials. If you are an anonymous visitor, skip to step 3.

3. Mouse over the comment to which you wish to post a reply. In the menu that appears, click **Reply** (as shown in Figure 31–20).

Figure 31–20   'Reply' Link Displayed Under a Posted Comment
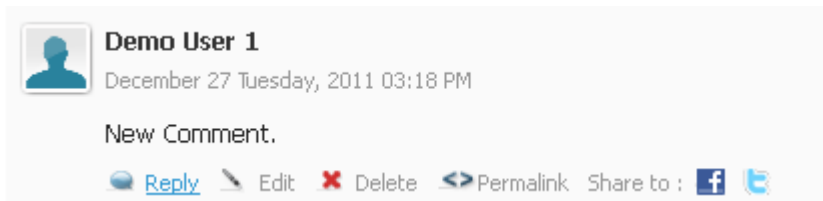
4. In the "Post a Reply" section (shown in Figure 31–21), enter your reply to the comment. If you are posting a reply as an anonymous visitor, you may have to enter your name, email address, and/or a verification code depending on the configurations made to the Comments widget tag in the Community interface.

Figure 31–21   'Post a Reply' Dialog Box
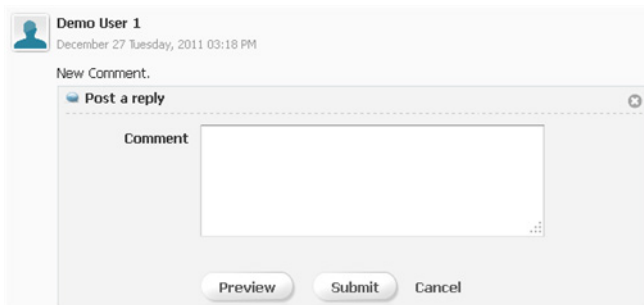
5. (Optional) Click **Preview** to preview how the response will look on the website.

6. Click **Submit**.

The reply is posted underneath the comment, as shown in Figure 31–22.

Figure 31–22   Reply Displayed Under the Comment

Your post is displayed under the comment to which you replied. If this is a moderated discussion, then the reply must be approved before it is displayed on the website.

31.7 Viewing Rating Details for Stars Ratings Widgets

If the Stars Ratings widget is deployed on a web page (as either a standalone widget or with a Reviews widget), you can view the "Details" pop-up which displays the total number of stars each visitor who submitted a rating gave to the web page.

To view rating details for Stars Ratings widgets

1. Access a web page on which a Stars Ratings widget is deployed (standalone or with a Reviews widget).

2. Navigate to the Stars Ratings widget and point to the stars (which display the average rating given to the web page).

The "Details" pop-up box is displayed (as shown in Figure 31–23).

Figure 31–23   Stars Ratings 'Detail' Pop-Up Box

31.8 Ranking Visitor Comments and Reviews

If the Comments and Reviews widgets are configured to support individual rankings by visitors, then visitors can rank the content of an individual comment or review by indicating whether the comment or review is helpful.

> **Note:** For information about enabling visitors to rank individual comments and reviews, see the description of the "Comment Ranking" field in Table 25–4 and the description of the "Review Ranking" field in Table 26–4.

To rate individual comments or reviews

1. Access the web page to which the comment or review you wish to rank is posted.

2. If you are an authenticated visitor, log in with your assigned credentials. If you are an anonymous visitor, skip to step 3.

3. Navigate to the comment or review you wish to rank. In the "Was this helpful?" field (shown in Figure 31–24), select either **Yes** or **No**.

Figure 31–24   'Was this helpful?' Field

31.9 Sharing Comments and Reviews with Facebook, Twitter, and Google+

If the Login Bar widget is configured to allow visitors to share comments and reviews via Facebook, Twitter, and Google+, and a visitor has an account with any of these social network providers, then that visitor can share a link on Facebook, Twitter, or Google+ to the web page on which the comment or review is posted.

To share a comment or review via Facebook, Twitter, or Google+

1. Access the web page to which the comment or review you wish to share is posted.

2. Point to the comment or review you wish to share via Facebook, Twitter, or Google+. In the menu that appears, click one of the icons in the **Share to** field. In Figure 31–25, you can click either the **Facebook**, **Twitter**, or **Google+** icon.

Figure 31–25   'Share to' Field

3. In the pop-up window, enter your credentials for the social network provider with which you chose to share the comment or review.

   A link to the web page is posted to your Facebook, Twitter, or Google+ news feed. Clicking this link opens the web page to which the comment or review is posted.

31.10 Creating and Sharing a Permalink

A permalink is a URL that is used to refer to a specific comment or review on a web page. When you access this URL, a static version of the web page opens displaying the

desired comment or review as the main focus of the page. Visitors can view and copy the link for a particular comment or review by clicking the **Permalink** option, located below the desired comment or review.

To use the permalink option

1. Access the web page to which the desired comment or review is posted.

2. Point to the desired comment or review.

3. In the menu that appears, click **Permalink** (as shown in Figure 31–26).

Figure 31–26   'Permalink' Option

The address bar displays the URL of the web page with the appended ID of the desired comment or review.

4. Copy the URL displayed in the address bar.

You can share this URL by posting it to a news feed, sending it to a contact through email, and so on.

31.11 Working with Ratings Widgets

If the widgets related to rating functionality are configured to enable authenticated visitors to rate topics on the website, only authenticated visitors can use the ratings widgets deployed on the pages of the website. Otherwise, all visitors (authenticated and anonymous) can use the ratings widgets. To determine whether the visitor permissions for rating content on the website are deployed successfully, follow the instructions in this section.

To submit a rating for a web page

1. Access the web page on which a ratings widget is deployed. The type of ratings widgets you may see are: Stars Ratings, Thumbs Up/Down Ratings, Like It Ratings, and Recommend Ratings.

   If the ratings widget requires visitors to log in to the website in order to submit a rating, see step 2. If all visitors can rate the content of an asset, skip to step 3.

2. Log in to the ratings widget by clicking the widget to open the "Login" pop-up box. In the "Login" pop-up box, enter your assigned credentials and then click **Login**.

3. Submit a rating for the topic. The type of rating field that is displayed to you is determined by which ratings widget tag was deployed on the web page. The following is a list of rating fields you may see on a web page:

   - **Stars Ratings** – (Complex rating) This widget (shown in Figure 31–27) allows you to rate the content of a topic by selecting from a range of one to five stars. One star represents the lowest rating that can be given to a topic and five stars represents the highest rating.

> **Note:** If the rating you post is low (two stars or less), and the moderation settings are set to mark all ratings of two stars or less as **Inappropriate**, the rating is marked with a status of **Inappropriate** in the Community interface and must be manually approved before it is accounted for in the total number of votes posted to the web page. For information about enabling manual moderation, see Section 30.2.5, "Working with the Moderation Screen."

Figure 31–27   Stars Ratings Field

- **Thumbs Up/Down Ratings** – (Binary rating) This widget (shown in Figure 31–28) displays thumbs up and thumbs down icons. Click one of the icons to indicate whether the content of the topic is informative.

Figure 31–28   Thumb Up/Down Ratings Field

- **Recommend Ratings** – (Unary rating) This widget (shown in Figure 31–29) displays an **Email a Friend** link which you can click to email the URL of the web page to a contact who may find the content useful.

Figure 31–29   Recommend Ratings Field
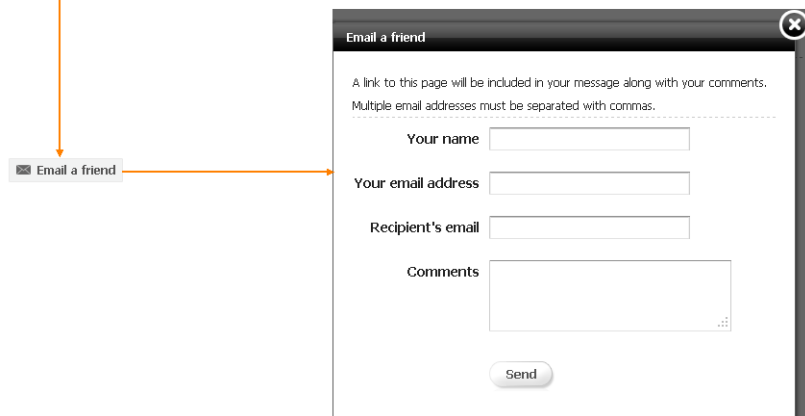
- **Like It Ratings** – (Unary rating) This widget (shown in Figure 31–30) displays a **Like** link which you can click to indicate that you liked the content of a given topic.

Figure 31–30   Like It Ratings Field

When you click the **Like** link, the link becomes unclickable and indicates that you like the content.

31.12 Working with Poll Widgets

Poll widgets are used to survey site visitors on a particular topic. Each visitor can submit one vote per poll.

To work with a Poll widget

1. Access the web page on which a Poll Tag is deployed.

2. Navigate to the poll widget and select an answer for the poll's question. (For example, Figure 31–31 displays the "Favorite Sport" poll deployed on a web page.)

Figure 31–31   'Favorite Sport' Poll

3. Click **Vote**.

    ■ If **Show Results** is disabled (Section 29.3, "Creating a New Poll"), then the visitor will not see the summary of the poll's results. Instead, the poll and its answer options are re-displayed to the site visitor. However, the answer options are greyed out, ensuring that each visitor submits only one vote.

    ■ If **Show Results** is enabled and the **Results View** field is set to **PopUp** (Section 29.3, "Creating a New Poll"), the **View Poll Results** button is displayed inside the Poll widget. Click the **View Poll Results** button to view a summary of the poll's results in a pop up box.

    ■ If **Show Results** is enabled and the **Results View** field is set to **In-Site** (Section 29.3, "Creating a New Poll"), a summary of the poll's results is displayed inside the Poll widget.

To work with the poll Results widget

Access the web page on which the poll's Results Tag is deployed and navigate to the poll Results widget. Figure 31–32 is an example of a poll results widget configured to display the summary of the poll's results as a pie chart.

Figure 31–32   Poll Results Widget
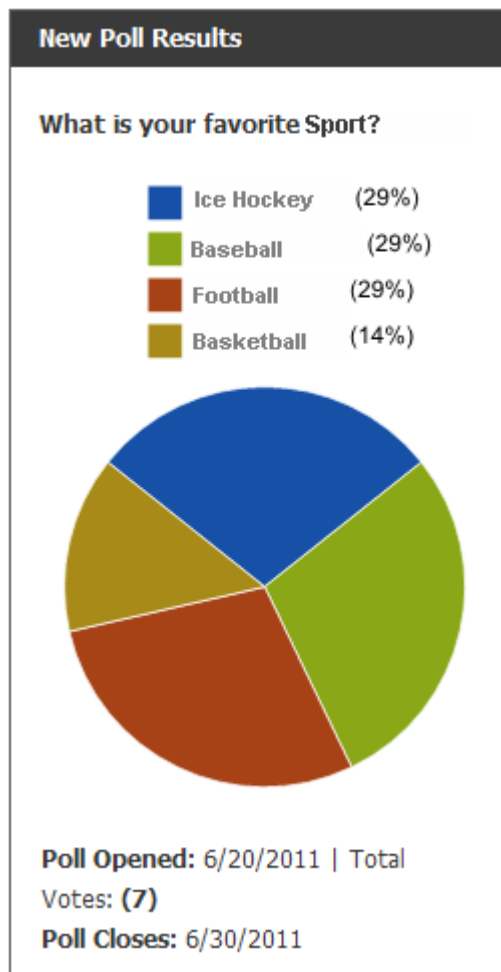
Part III

Creating Blog Content

This part provides information on creating Blog content.

Part III contains the following chapter:

32

Creating Blog Content

This chapter provides instructions for creating blog assets and categories, and modifying blog author assets. It also provides instructions for working with the comment fields that are added to your blog pages if the Community application was integrated with the Community Blogs module.

This chapter contains the following sections:

- Section 32.1, "Creating Blog Assets"
- Section 32.2, "Creating a Blog Category"
- Section 32.3, "Editing Your Blog Author Asset"
- Section 32.4, "Moderating Visitors' Comments on Blog Assets"

32.1 Creating Blog Assets

Blog assets are the units of content that are displayed on the website. You can create blog assets using the WebCenter Sites Contributor interface.

To create a blog asset

1. Log in to WebCenter Sites with your assigned credentials, select the site on which the blog start menu items are enabled and then select the icon for the WebCenter Sites **Contributor** interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Blog Asset**.

   A tab opens displaying the New Blog Asset form, shown in Figure 32–1:

Figure 32–1   Blog Asset Content Entry Form

3. In the **Content** section of the form, fill in the following fields:

    ■   **Name** – Enter a name for the blog asset (up to 64 characters).

    ■   **Tags** – Enter a single word or short phrase to attach to the bog asset. You can
        either enter a new tag into this field or apply a pre-existing tag. For more
        information about tags, see Section 6.6.2, "Working with Tags."

    ■   **Template** – Select the template that will render this blog asset's content.

    ■   **Blog Category** – Select the category (or categories) for the blog asset.

- **Abstract** – Enter a summary for the blog asset. This summary will be displayed on the website.

- **Author** – Do one of the following:

  - If a blog author asset was created for you, enter the name of the asset (to access the asset, follow the steps in Section 32.3, "Editing Your Blog Author Asset"). When your blog asset is published with your blog author asset, your full name and image (both contained in the blog author asset) will be displayed next to your blog post.

  - If a blog author asset was not created for you, enter the name you want to be displayed next to your blog post.

- **Blog Body** – Enter the content of your blog.

- **Blog's Date and Time** – Enter the date and time the blog asset was created. This date and time will be displayed under the blog asset to website visitors.

- **Blog Title** – Enter the title of the blog. This title will be displayed on the website to visitors.

4. If you want the blog asset to be available on the website for only a certain period of time, switch to the **Metadata** section of the form and fill in the **Start Date** and **End Date** fields. For more information about start and end dates, see Section 7.3.4, "Assigning Start and End Dates."

5. Click the **Save** icon.

   This asset must be approved and published in order for its content to be displayed to website visitors. If a blog author asset exists, make sure that asset, as well, is published. For more information about approval and publishing, see Chapter 14, "Approval for Publishing."

32.2 Creating a Blog Category

When creating blog assets, you may want to create categories that are relevant to the content of the new blogs. You can create new blog categories in the WebCenter Sites Contributor interface. For example, if your site will contain blogs about new products your company is coming out with, you may want to create a "New Products" category. All blogs pertaining to a new product would be associated with this category.

To create a blog category

1. Log in to WebCenter Sites with your assigned credentials, select the site on which the blog start menu items are enabled, and then select the icon for the WebCenter Sites **Contributor** interface.

2. In the menu bar, select **Content**, then select **New**, and then select **New Blog Category**.

3. In the "New Blog Category" form, fill in the following fields:

Figure 32–2   'New Blog Category' Form

- **Name** – Enter a name for the new blog category (for example New Products).

- **Blog Category Definition** – Select a definition from the drop-down list, `BlogCategory` in this example (`BlogCategory` places the New Products category at the third level). For more information about the default options, see "The Community Blogs Data Model" chapter in the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

4. In the **Content** section of the form (shown in Figure 32–3), fill in the following fields:

Figure 32–3   'New Blog Category' Form: 'Content' Section

- **Template** – Select the template that will render this category's content.

- **ParentBlogCategory** – Select the name of your category's parent (one level above the category you are creating. In our example, the parent you select in this field becomes the grandparent of blog assets that will be associated with the category.)

5. In the **Metadata** section of the form (shown in Figure 32–4), fill in the following fields:

Figure 32–4   'New Blog Category' Form: 'Metadata' Section

- **Description** – Enter a brief description about the category.

- **Start Date** and **End Date** – If the category must be available for only a certain period of time, set the period by specifying the start and end dates. For more information about start and end dates, see Section 7.3.4, "Assigning Start and End Dates."

6. Click **Save**.

   The blog category asset must be approved and published to the website in order for it to be displayed to website visitors. For more information, see Chapter 14, "Approval for Publishing."

32.3 Editing Your Blog Author Asset

An administrator of your system may have created an author asset for you, which is used to render your full name and image next to the blogs you post. This author asset is your blog profile; it contains your full name and profile image. You can modify the information in this author asset from the WebCenter Sites Contributor interface. Any changes you make are automatically generated on the web pages that contain your blogs.

To edit your blog author asset

1. Log in to WebCenter Sites with your assigned credentials, select the site on which the blog start menu items are enabled, and then select the icon for the WebCenter Sites **Contributor** interface.

2. Access your author asset:

   a. In the search field, click the down arrow to open the "Search Type" drop-down list.

   b. Click **Find Blog Author**.

   c. Click **Search**.

>   **d.** Select your author asset.
>
>   A tab opens displaying the Inspect view for your blog author asset.

3. In the blog author asset's toolbar, click the **Edit** icon.

4. Make the desired changes to the fields, and then click the **Save** icon.

   If you changed the full name or profile image, then the changes will be automatically generated next to your blog posts.

32.4 Moderating Visitors' Comments on Blog Assets

If your system is integrated with the Community application and your blog pages are tagged with the Community application's comment tags, then the pages display comment fields, where visitors can contribute feedback on blog content. Comment links may also be included. If the Community application is configured for manual comment moderation, then all comments on blog assets will await approval from the moderators. If you are a moderator you can approve, delete, or edit comments, or mark them as inappropriate.

To moderate comments that visitors posted to blog assets

1. Log in to WebCenter Sites as a moderator, select the site on which the Community application is enabled and then select the **Community** icon.

Figure 32–5   WebCenter Sites Login Form: Select Site

The Community interface's "All Comments" screen opens (shown in Figure 32–6):

Figure 32–6   'All Comments' Screen

2. If you want to review comments posted about a specific blog asset, select **Comments**, then select **Moderate**, then select **Comments by Topic**, and then select the blog title whose comments you wish to review.

To approve a comment

1. Mouse over the comment you wish to approve, and click **Approve**.

   The comment is now displayed in the "All Comments" list with a status of "Approved." The comment is also displayed on the website under the blog to which it was posted.

To modify a comment before approving it

1. Mouse over the comment you wish to edit, and click **Edit**.

2. In the "Comment" field, modify the content of the comment. Click **Save**.

   The comment is now displayed in the "All Comments" list with the modifications you made.

To delete a comment

1. Mouse over the comment you wish to delete, and click **Delete**.

2. In the warning box, click **OK**.

   The comment is removed from the "All Comments" list and deleted from the system.

To mark a comment as inappropriate

1. Mouse over the comment that contains the inappropriate content, and click **Mark Inappropriate**.

The comment is displayed in the "All Comments" list with a status of **Inappropriate**.

For more information about working with comments in the Community interface, see Chapter 25, "Working with the Comments Widgets."

Part IV

Using the Gadgets Application

This part describes Oracle WebCenter Sites: Gadgets, an application designed to serve gadgets that deliver website content. This part begins with an overview of the Gadgets application, and provides instructions on deploying gadgets on the pages of your website.

> **Note:** This part is for advanced content contributors who have experience working with tags and templates.

Part IV contains the following chapters:

- Chapter 33, "Introducing the Oracle WebCenter Sites: Gadgets Application"
- Chapter 34, "Getting Started"
- Chapter 35, "Re-configuring Gadget and Dashboard Settings"
- Chapter 36, "Deploying Gadgets and the Dashboard"
- Chapter 37, "Testing Deployed Gadgets"

33

Introducing the Oracle WebCenter Sites: Gadgets Application

This chapter provides an overview of the Gadgets application. It also provides information about the permissions granted to users of the Gadgets User interface.

This chapter contains the following sections:

- Section 33.1, "Overview of the Gadgets Application"
- Section 33.2, "Gadgets User Interface"
- Section 33.3, "Permissions for the Designer Role in the Gadget's User Interface"

33.1 Overview of the Gadgets Application

Gadgets are remote pieces of functionality that deliver dynamic content, such as news feeds and articles from one website to another. The Gadgets application is a gadget container application that runs on the Web Experience Management (WEM) Framework. The Gadgets application enables you to deploy to your website individual gadgets (Figure 33–1) and/or a dashboard containing one or more gadgets (Figure 33–1 - Figure 33–5).

Each visitor is provided with her own instance of a gadget and/or dashboard. The visitor can edit her gadgets' settings (if available) and customize the dashboard.

Figure 33–1   Deployed Gadget
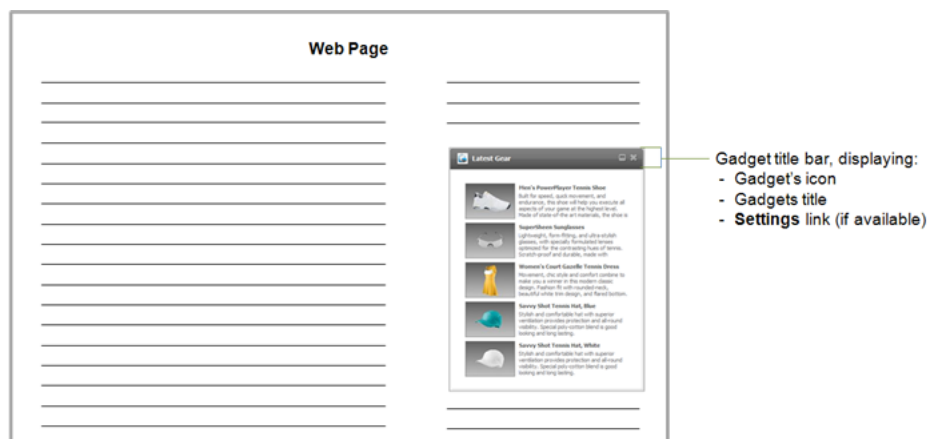
Figure 33–2   Deployed Dashboard

The dashboard has a customization workspace with three types of collapsible panels: gadget selection panel (Figure 33–3), gadget layout panel (Figure 33–4), and color theme panel (Figure 33–5).

Figure 33–3   Expanded Dashboard Displaying the Gadget Selection Panel

Figure 33–4 Expanded Dashboard Displaying the Gadget Layout Panel
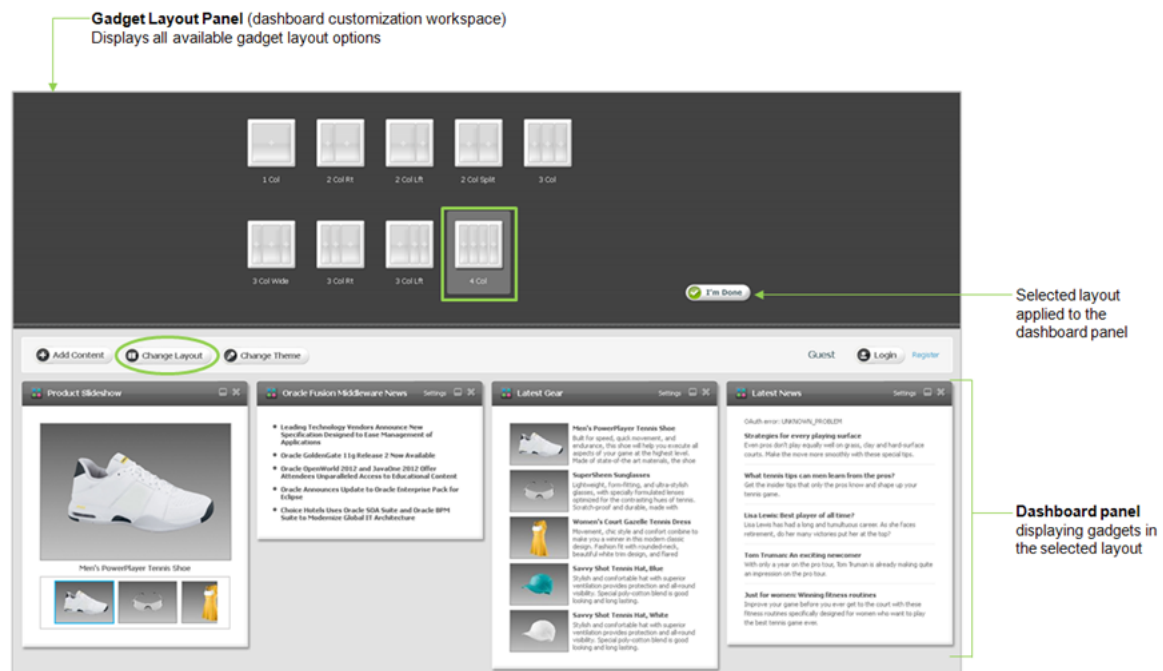
Figure 33–5 Expanded Dashboard Displaying the Color Theme Panel
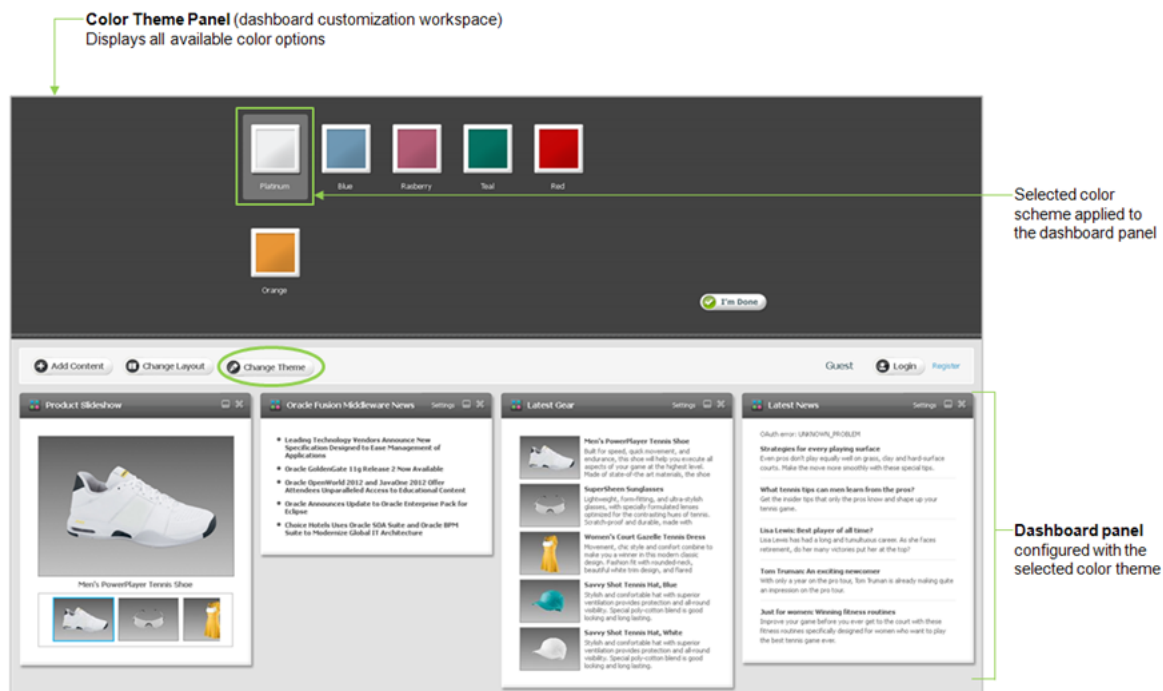
33.2 Gadgets User Interface

The Gadgets application provides two types of interfaces: the Global Gadget Catalog interface and the Gadgets User interface. The Gadgets User interface is displayed when the Gadgets application is assigned to a site other than the site on which the Global Gadget Catalog interface is enabled.

> **Note:** The Global Gadget Catalog interface is accessible only to general administrators. For a detailed overview of the Global Gadget Catalog interface, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

Site gadget catalogs are local and specific to each site on which the Gadgets User interface is enabled. Along with the site gadget catalog, the User interface features the dashboard, the "Permissions" and "Settings" screens, and screens for single gadget and dashboard deployment. **The dashboard and single gadget deployment screens are dynamically associated with the site gadget catalog.** When an administrator registers a gadget to the site gadget catalog, the gadget is made available for individual deployment and on the dashboard, as a thumbnail image, on the selection panel (shown in Figure 33–3).

Figure 33–6 illustrates the functions associated with the Gadgets application's User interface and identifies the roles that have permissions to the Gadgets User interface's functions.

Figure 33–6   Permissions to the Gadgets User Interface
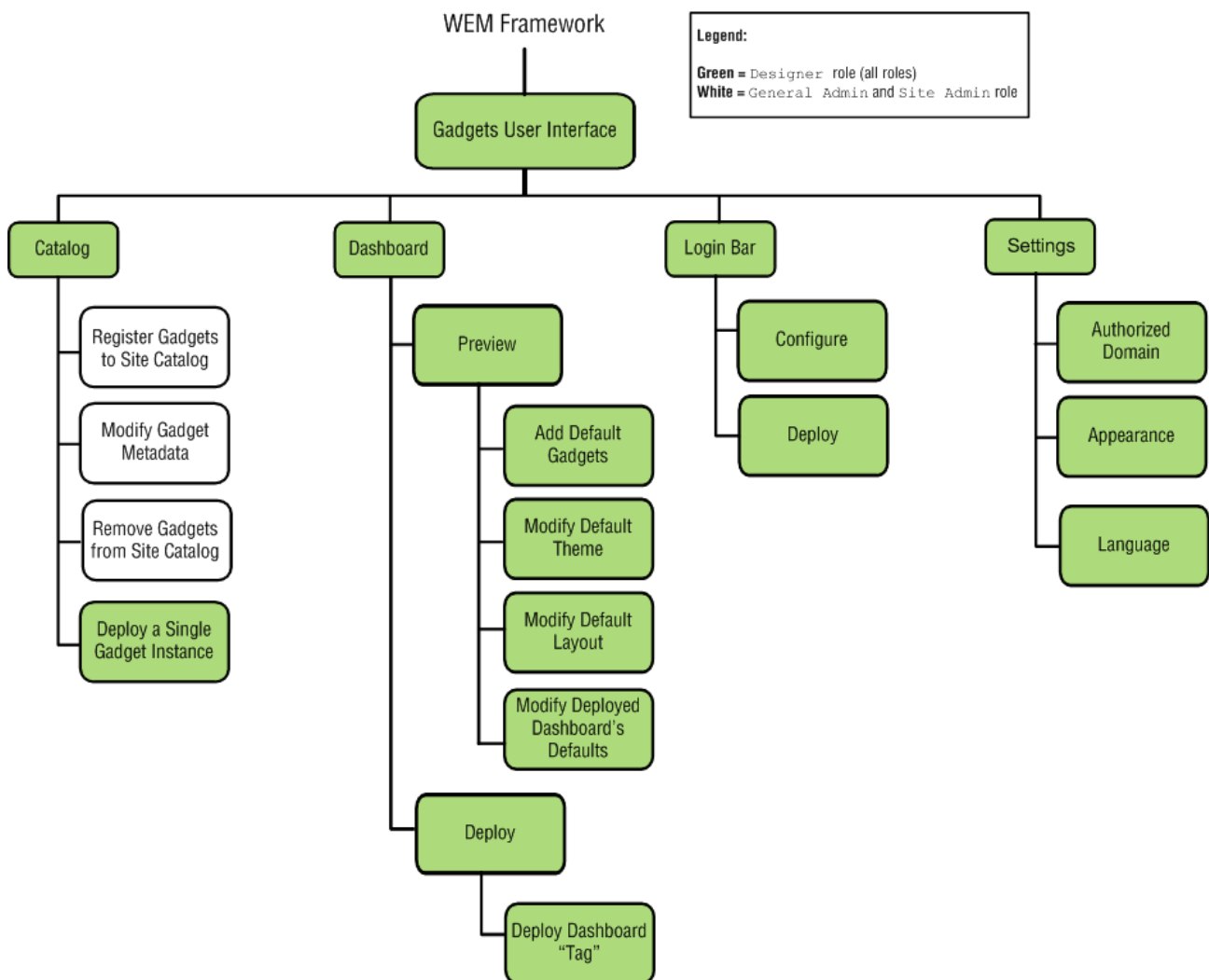
33.3 Permissions for the Designer Role in the Gadget's User Interface

Users assigned the `Designer` role can manage the appearance of the default dashboard, deploy the dashboard tag and tags for single gadget on web pages, and configure and deploy the Login Bar widget tag. These users also have permissions to specify the language in which deployed gadgets and the dashboard are displayed, specify a domain on which the gadgets and dashboard widget tags can be deployed, and configure the appearance settings of the Gadgets User interface, the dashboard widget tag, and the single gadget widget tags.

Table 33–1 provides an overview of the permissions granted to users assigned the Designer role in the Gadgets User interface.

Table 33–1   Gadgets User interface's roles and permissions

Permissions	For Information, See...
Add Gadgets to the Dashboard as Defaults	Section 35.1.1, "Adding or Removing Default Dashboard Gadgets"
Modify the Dashboard's Default Layout	Section 35.1.2, "Modifying the Default Layout of the Dashboard"
Modify the Dashboard's Default Color Theme	Section 35.1.3, "Modifying the Default Color Theme of the Dashboard"
Configure and Deploy the Login Bar Widget Tag	Section 35.2, "Reconfiguring and Deploying the Login Bar Widget"
Authorize a Domain	Section 35.3, "Authorizing a Domain for Gadgets and the Dashboard"
Configure Appearance Settings for the Gadgets Application	Section 35.4, "Configuring Gadget Appearance Settings"
Configure a Language Preference for Deployed Gadgets	Section 35.5, "Setting the Language of Deployed Gadgets and the Dashboard"
Deploy the Dashboard "Tag"	Section 36.2, "Deploying the Dashboard"
Deploy an Individual Gadget's "Tag"	Section 36.3, "Deploying a Single Gadget"
Modify the Deployed Dashboard's Defaults	Section 36.4, "Modifying the Deployed Dashboard"

34

Getting Started

This chapter provides instructions for logging in to the Gadgets application's interfaces.

This chapter includes the following sections:

34.1 Logging In to a Site Gadget Catalog

The Gadgets application is associated with WebCenter Sites. When the Gadgets application is enabled on a site other than the site on which the Global Gadget Catalog is enabled, the Gadgets application displays its Gadgets User interface.

To log in to a Site Gadget Catalog

1. Access the WEM Framework at the following URL:

    ```
    http://<server>:<port>/<application context>/login
    ```

    where `<server>` is the host name or IP address of the server running WebCenter Sites, `<port>` is the port number of the WebCenter Sites application, and `<application context>` is the name of the web application that was deployed on the server.

2. Access the Gadgets application by logging in to WebCenter Sites. **Log in credentials are case-sensitive.**

    In this example, we are logging in as a user assigned the `Designer` role.

Figure 34–1   WebCenter Sites Login Form
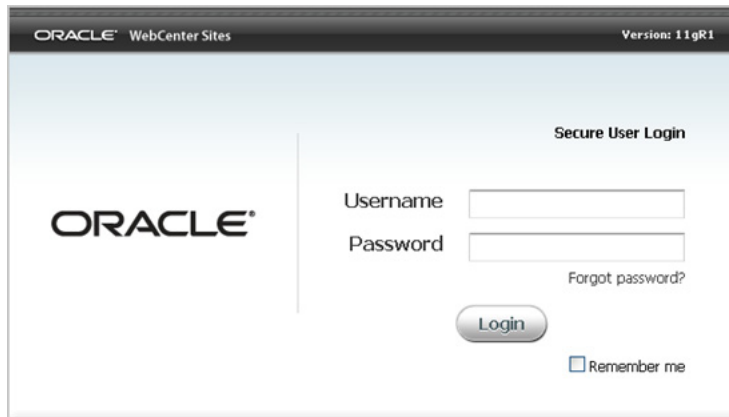
3. Click **Login**.

4. If you are logging in for the first time, or logging in to a site you have never accessed before, the screen shown in Figure 34–2 opens. To access the Gadgets User interface, select the desired site on which it was enabled, and then click the **Gadgets** icon.

Figure 34–2   WebCenter Sites Login Form: Select a Site

The Gadgets User interface opens and displays one of the following screen:

– If no gadgets are registered to the site gadget catalog, you will see the screen in Figure 34–3.

Figure 34–3   Unpopulated Site Gadget Catalog
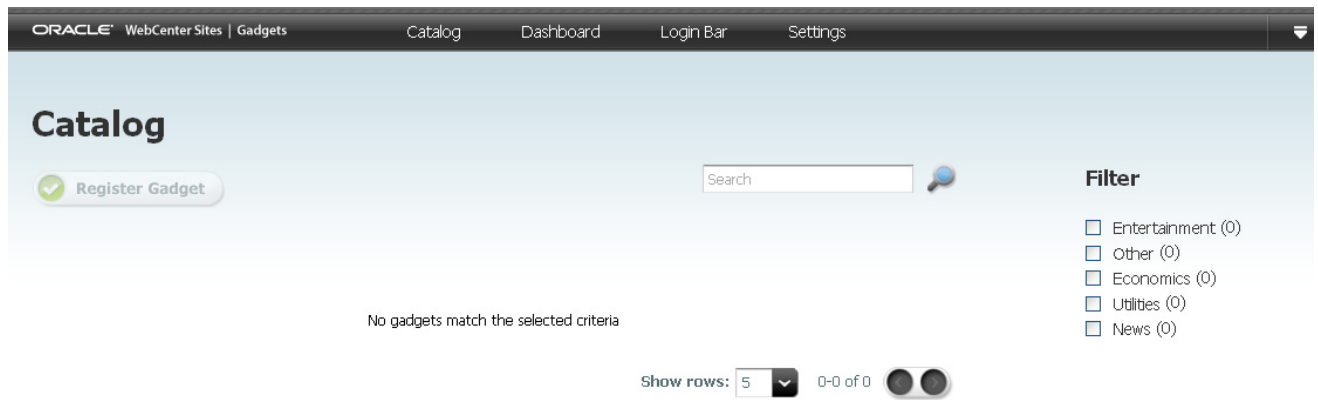
- If an administrator previously registered gadgets to the site gadget catalog or shared a gadget from the Global Gadget Catalog to the site gadget catalog, the site gadget catalog will look similar to the screen shown in Figure 34–4:

Figure 34–4   Populated Site Gadget Catalog
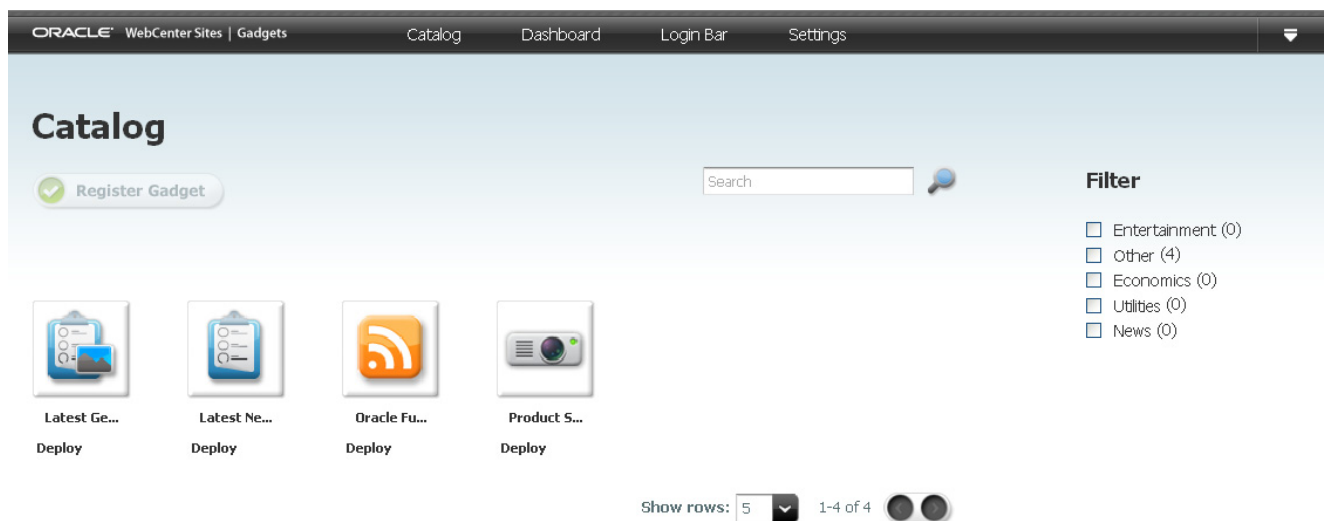
The Gadgets User interface contains the site gadget catalog, dashboard, "Permissions" and "Settings" screens, dashboard deployment tag, "Login Bar" configuration and deployment screens, and single gadget deployment tags for the site to which you logged in.

34.2 Sample Gadgets

In this guide we assume that the Gadgets Samples Module was installed on the FirstSite II sample site of your WebCenter Sites system. Installing the sample module:

- Installs the `FW_CSGadget` (whose description is `CS-Based Gadget`) asset type, from which sample and custom gadgets are created.

- Enables the `FW_CSGadget` (whose description is `CS-Based Gadget`) asset type on FirstSite II.

- Installs sample gadgets on FirstSite II (see Table 34–1).

- Installs assets that provide content for the sample gadgets.

- Provides templates that render the gadgets. **These templates** (Table 34–2) **are required for all gadgets (sample and custom).**

Table 34–1   Sample Gadgets of Type `FW_CSGadget`

Sample Gadgets of Type *FW_CSGadget*	Description
ListGadget	Displays a list of articles on the FirstSite II sample site.
RSSGadget	Displays a list of entries from an RSS feed.
SlideshowGadget	Displays a list of Product images in a slideshow format.
ThumbListGadget	Displays a list of products with thumbnail images.

Table 34–2   Gadget Templates

Templates	Description
ListSiteGadgets	Lists URLs of the gadget descriptor XML files.
GenerateGadgetXML	Starts the process of rendering a gadget's descriptor XML

More information about the Gadgets Samples Module is available in the *Oracle Fusion Middleware WebCenter Sites Installation Guide*.

34.3 Next Steps

Now that you are familiar with the Gadgets application's interfaces, if your administrator has registered gadgets to the site gadget catalog, you can start working with and deploying gadgets and the dashboard. For information about working with the Gadget User interface, see Chapter 35, "Re-configuring Gadget and Dashboard Settings." for information about deploying gadgets and the dashboard, see Chapter 36, "Deploying Gadgets and the Dashboard."

35

Re-configuring Gadget and Dashboard Settings

This chapter contains the following sections:

- Section 35.1, "Configuring Dashboard Defaults"
- Section 35.2, "Reconfiguring and Deploying the Login Bar Widget"
- Section 35.3, "Authorizing a Domain for Gadgets and the Dashboard"
- Section 35.4, "Configuring Gadget Appearance Settings"
- Section 35.5, "Setting the Language of Deployed Gadgets and the Dashboard"

35.1 Configuring Dashboard Defaults

The dashboard is a gadget container. The dashboard can be configured to display selected gadgets in a preferred layout and/or color theme. The configurations you apply to the dashboard are considered to be defaults. Site visitors who access a deployed dashboard are given their own instance of the dashboard, which they can personalize by modifying its appearance.

Note: When a gadget is registered to a site gadget catalog or shared from the global catalog to a site gadget catalog, its thumbnail is placed on the dashboard, on the gadget selection panel. If there are no gadgets registered to the site gadget catalog, you dashboard will be empty. For instructions on registering gadgets to a site gadget catalog, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

To access the dashboard

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Dashboard**, and then select **Preview**.

   The preview of the dashboard opens (as shown in Figure 35–1).

Figure 35–1   Dashboard Preview
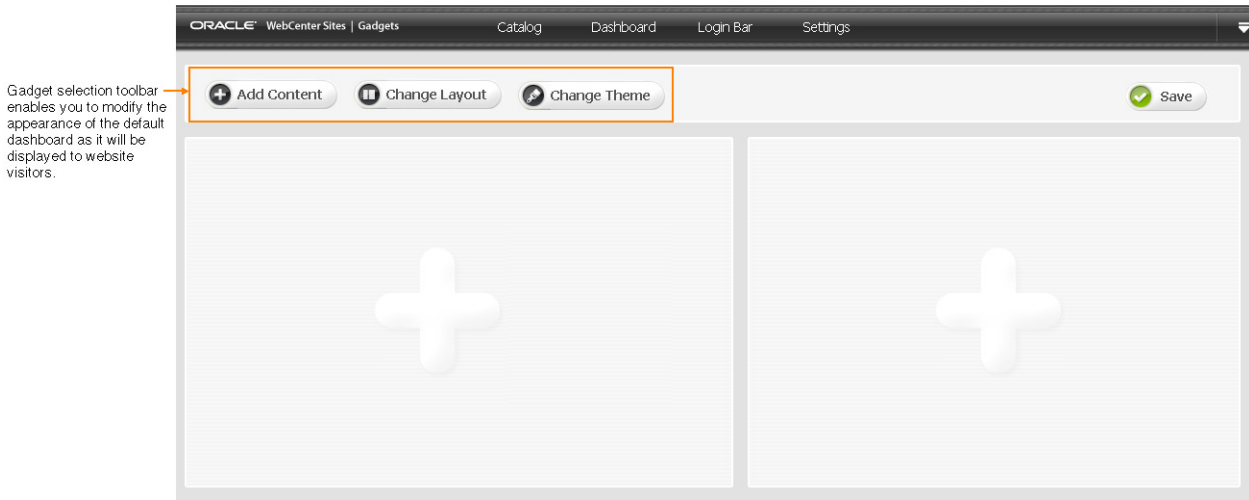
The following configuration options are available to you:

- Section 35.1.1, "Adding or Removing Default Dashboard Gadgets"

- Section 35.1.2, "Modifying the Default Layout of the Dashboard"

- Section 35.1.3, "Modifying the Default Color Theme of the Dashboard"

35.1.1 Adding or Removing Default Dashboard Gadgets

You can display gadgets at full size by adding them to the dashboard panel, from the gadget selection panel (shown in Figure 35–2). If you remove a gadget from the dashboard panel, its thumbnail remains on the gadget selection panel. When a dashboard is deployed, its set of gadgets is fixed for site visitors until you modify the set. Visitors can display the gadgets at full size or as thumbnails by adding them to or removing them from the dashboard panel.

Figure 35–2   Dashboard's Gadget Selection Panel
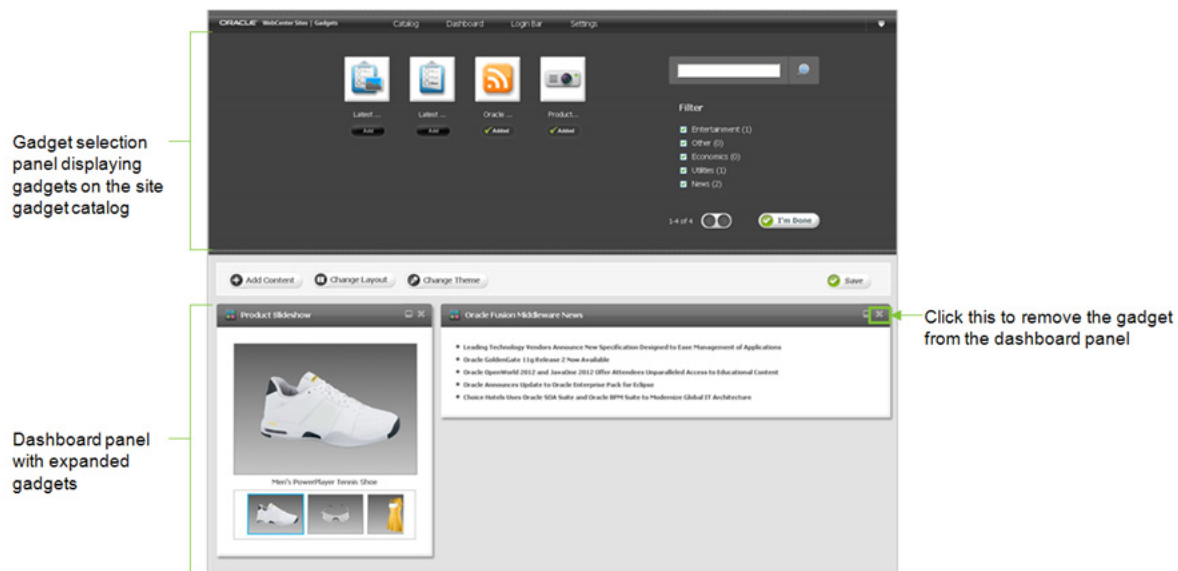
To add or remove default dashboard gadgets

1. **Access the dashboard** by accessing the Gadgets User interface, and selecting **Dashboard**, and then **Preview** (detailed steps in Section 35.1, "Configuring Dashboard Defaults").

2. Add gadgets to the dashboard panel:

   a. Click the dashboard's **Add Content** button.

   b. In the gadget selection panel, navigate to the gadget you wish to add to the dashboard panel:

      a. (Optional) If you want to preview how the gadget's content will be displayed to website visitors before you add it, click the gadget's thumbnail image.

      b. Click **Add**.

      The gadget is displayed on the dashboard panel.

   c. Click **I'm Done**.

      The gadget selection panel closes.

   d. (Optional) To move the gadget to another position on the dashboard panel, click its title bar and drag the gadget to the desired slot.

   e. Click **Save**.

      The configurations are picked up by the dashboard tag.

3. **Remove a gadget from the dashboard panel:**

   a. In the dashboard panel, navigate to the gadget you wish to remove as a default, and click the **X** (located in the gadget's title bar) to remove the gadget.

      The gadget is removed from the dashboard panel, but it is still accessible from the gadget selection panel, via its thumbnail.

   b. Click **Save** to propagate your configurations to the dashboard widget tag.

35.1.2 Modifying the Default Layout of the Dashboard

The dashboard's layout panel (shown in Figure 35–3) allows you to select the desired layout in which to arrange the gadgets on the dashboard panel.

Figure 35–3   Dashboard's Layout Panel
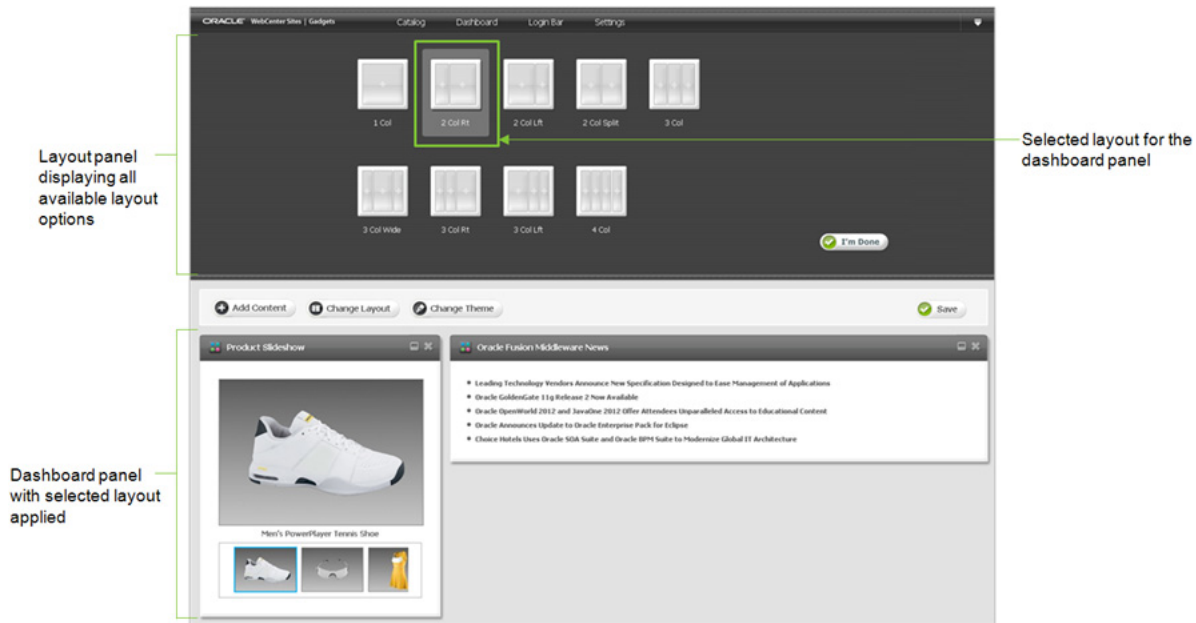
To modify the default layout of the dashboard

1. **Access the dashboard** by accessing the Gadgets User interface, and selecting **Dashboard**, and then **Preview** (detailed steps in Section 35.1, "Configuring Dashboard Defaults").

2. Modify the default layout of the dashboard:

   a. Click the dashboard's **Change Layout** button.

   b. In the layout panel, select the desired default layout for the dashboard panel.

      The selected layout is applied to the dashboard panel.

   c. Click **I'm Done**.

      The gadget selection panel closes.

   d. Click **Save** to propagate your configurations to the dashboard widget tag.

35.1.3 Modifying the Default Color Theme of the Dashboard

The dashboard's theme panel (shown in Figure 35–4) enables you to modify the dashboard's theme, which changes the dashboard's color scheme.

Figure 35–4   Dashboard's Theme Panel
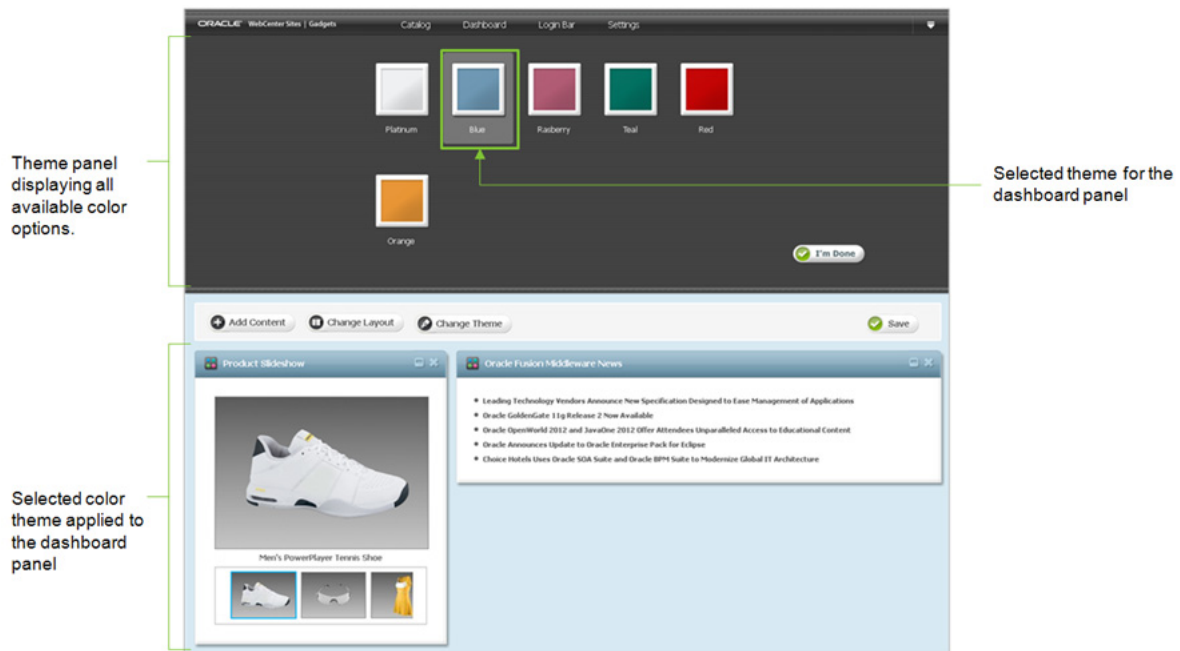
To modify the default color theme of the dashboard

1. Access the dashboard by accessing the Gadgets User interface, and selecting **Dashboard**, and then **Preview** (detailed steps in Section 35.1, "Configuring Dashboard Defaults").

2. **Modify the color theme of the dashboard:**

   a. Click the dashboard's **Change Theme** button.

   b. In the theme panel, select the desired color scheme for the dashboard panel.

      The selected color is applied to the dashboard panel

   c. Click **I'm Done**.

      The theme panel closes.

   d. Click **Save** to propagate your configurations to the dashboard widget tag.

35.2 Reconfiguring and Deploying the Login Bar Widget

This section provides instructions for reconfiguring and deploying the Login Bar widget. The **Login Bar** menu is used to reconfigure the login bar site visitors use to log in to the gadgets and dashboard deployed on the pages of your company's site. Configuring login settings includes determining which credentials (for example, Facebook, Twitter, and Google+) visitors can use to log in to the gadgets and dashboard displayed on your website. Once you save these settings, the system dynamically updates all deployed Login Bar widgets on the website.

> **Note:** The Login Bar widget is common to the Gadgets application and the Community application. Any changes you make to the Login Bar widget in the Gadgets User interface are also applied to the Login Bar widget in the Community interface, and vice versa.
>
> For more information about configuring the Login Bar, see Chapter 28, "Working with the Login Bar Widget."

This section contains the following:

- Section 35.2.1, "Reconfiguring the Login Bar Widget's Default Settings"
- Section 35.2.2, "Deploying a Login Bar Widget Tag"

35.2.1 Reconfiguring the Login Bar Widget's Default Settings

The Login Bar widget's default settings are its saved settings. These settings determine which credentials visitors can use to log in to the gadgets and dashboard deployed on the pages of your website.

Once default settings are saved, they dynamically modify all Login Bar widget tags deployed on the website (including standalone instances and instances that are embedded in and deployed with community widget tags and the dashboard).

To configure the Login Bar widget

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Login Bar**, and then select **Configure**.

Figure 35–5 'Social Login' Screen
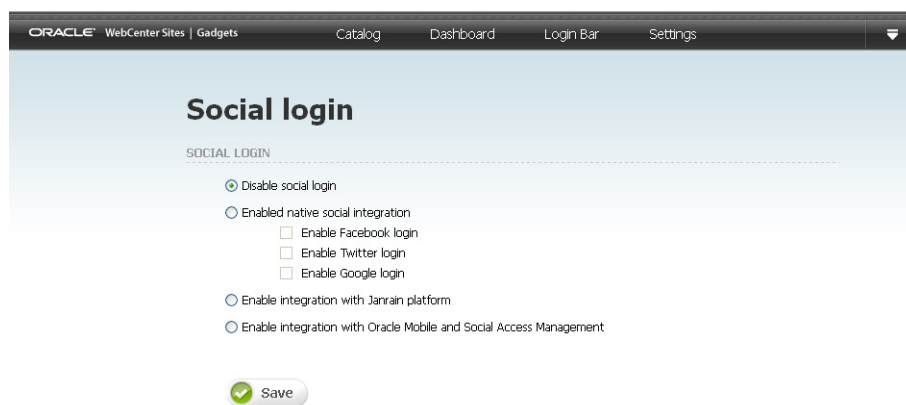
4. Reconfigure the Login Bar widget. For instructions, see Table 28–1 in Section 28.2, "Reconfiguring the Login Bar Widget's Default Settings."

35.2.2 Deploying a Login Bar Widget Tag

The Login Bar widget tag can be deployed as a standalone widget on a web page or embedded in the tag of the dashboard and/or a community widget. This section provides instructions for deploying a standalone Login Bar widget tag.

To deploy the Login Bar widget tag

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Login Bar**, and then select **Deploy**.

   The "Login Bar Deployment" screen opens (as shown in Figure 35–6).

Figure 35–6   'Login Bar Deployment' Screen
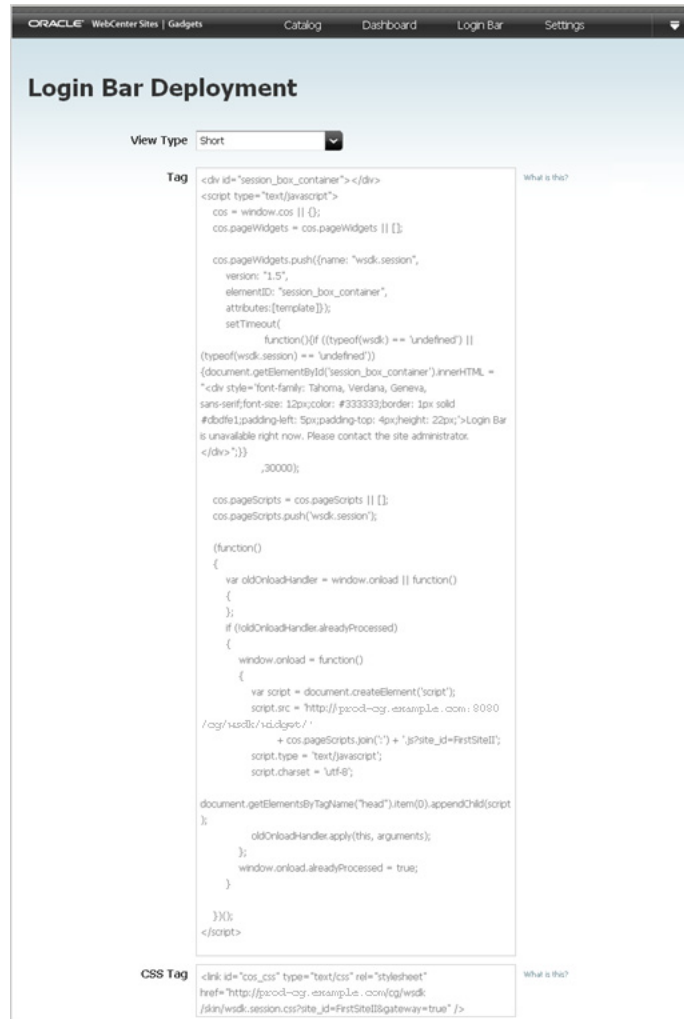
4. Deploy the Login Bar widget tag with either default or custom settings. For instructions, see Section 28.3, "Deploying a Login Bar Widget Tag."

35.3 Authorizing a Domain for Gadgets and the Dashboard

Authorizing a domain enables you to specify the domain on which gadget widget tags and the dashboard widget tag can be deployed. This restricts the usage of the tags to only the domain you authorize.

To authorize a domain

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Settings**, and then **Authorized Domain**.

   The "Autorized Domain" screen opens (as shown in Figure 35–7).

Figure 35–7   'Authorized Domain' Screen

4. In the **Domain URL** field, enter the domain name of the site(s) on which you wish to display gadgets and the dashboard. For example

   ```
   www.examplecompany.com or www.myexample.example.com
   ```

   To specify the domain name of multiple sites, separate each domain name with a comma. For example:

   ```
   www.examplecompany.com, www.examplecompany2.com, www.examplecompany3.com,
   *.examplecompany.com
   ```

   Gadgets and the dashboard can be rendered only on the specified domain(s). If a visitor views the source code of your company's site, and attempts to copy and deploy the gadget (or dashboard) on his own site, the deployment will fail.

   > **Note:**   The **Domain URL** field is optional. If you do not wish to specify a domain on which gadget and dashboard tags can be deployed, leave this field blank.

5. Click **Save**.

   Gadget widget tags and the dashboard widget tag can be deployed only on the domain you specified.

35.4 Configuring Gadget Appearance Settings

Configuring gadget appearance settings enables you to control the appearance of the Gadgets User interface, the dashboard, and the single gadget widget tags.

To configure gadget appearance settings

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Settings**, and then select **Appearance**.

The "Appearance Settings" screen opens (shown in Figure 35–8).

Figure 35–8   'Appearance Settings' Screen

4. Fill in the following fields:

   ■ **Login Bar Required** – Select either **Yes** or **No** to specify whether a Login Bar widget tag will be embedded in and deployed with the dashboard widget tag.

   ■ **Skin** – Select **Default** to use the default appearance of the Gadgets User interface. Select **Custom** to upload your own CSS file.

   ■ **Upload Custom CSS** – If you selected the *Custom* option in the "Skin" field, use the **Browse** button to select a cascading style sheet that will control the appearance of the Gadgets User interface (for example, the text fonts), the dashboard, and the single gadget widget tags (for example, the header, background images, and so on).

   ■ **Upload Categories** – Use the **Browse** button to upload the desired category file, which will dynamically modify the categories available in:

     – The "Filter" panel in the Gadgets User interface's "Catalog" screen and the dashboard's gadget selection panel.

     – The **Category** field in the "Register New Gadget" screen.

Note: The category file must be in `.txt` format, the categories listed in the file must be in a `key=value` structure, only an English alphanumeric string is permitted for the `key` in the `key=value` pairs, each category listed in the file must be on its own line, and the size of the file can be no more than 100KB.

You cannot remove the default categories (News, Entertainment, Utilities, Economics, and Others). These categories are automatically added to any category file you upload.

---

5. Click **Save**.

35.5 Setting the Language of Deployed Gadgets and the Dashboard

You can use the "Language" screen to specify the language in which deployed gadgets and the dashboard will be displayed.

Set the language of deployed gadgets and the dashboard

1. Log in to WebCenter Sites with designer credentials.

2. Access the desired site on which the Gadgets User interface is enabled, and select the **Gadgets** icon.

3. In the menu bar, select **Settings**, and then select **Language**.

    The "Language" screen opens (shown in Figure 35–9).

Figure 35–9   'Language' Screen
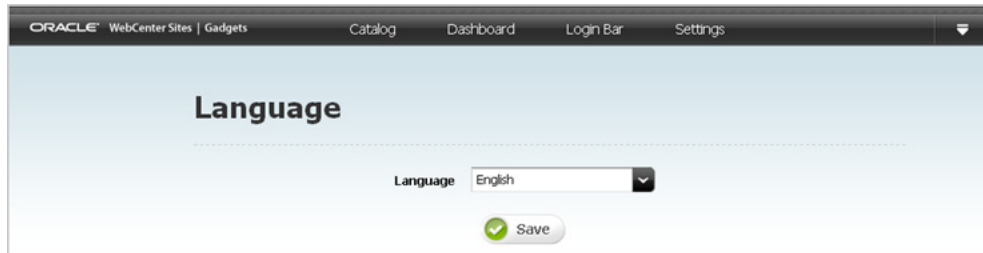
4. In the "Language" field, click the down-arrow to display the Language drop-down menu. Select the language in which the dashboard and individually deployed gadgets will be displayed.

    The available options are:

    ■   **English**

    ■   **Brazilian Portuguese**

    ■   **Simplified Chinese**

    ■   **Traditional Chinese**

    ■   **French**

    ■   **German**

    ■   **Italian**

    ■   **Japanese**

    ■   **Korean**

    ■   **Spanish**

    Note: If the desired language is not listed, contact your WebCenter Sites administrator or developers.

36

Deploying Gadgets and the Dashboard

This chapter provides information and instructions about deploying a single gadget and the dashboard on a web page.

This chapter contains the following sections:

- Section 36.1, "Overview of Deploying Gadgets and the Dashboard"
- Section 36.2, "Deploying the Dashboard"
- Section 36.3, "Deploying a Single Gadget"
- Section 36.4, "Modifying the Deployed Dashboard"

36.1 Overview of Deploying Gadgets and the Dashboard

To deploy gadgets, you insert the dashboard tag or the tag for a single gadget into a template asset and then publish that template. Once the dashboard or the individual gadget instance is deployed, any modifications made to either the gadget's metadata (by your administrators) or the dashboard are dynamically updated on the website. Therefore, you do not need to re-deploy the gadget instance or dashboard, unless you want to display the gadget or dashboard on other web pages.

Figure 36–1 provides an overview of the process of deploying a single gadget and the dashboard.

Figure 36–1   Basic Details for Deploying Gadgets and the Dashboard

When a gadget is registered (or shared) to a site gadget catalog, the gadget is made available for deployment in two places:

The dashboard's gadget panel, as a thumbnail image

The "Single Gadget Deployment" screen

Single Gadget Deployment
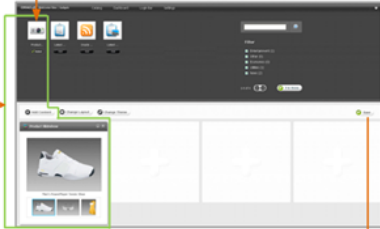
1a A user with the Designer role can add the gadget to the dashboard panel (by clicking **Add Content**) as a default for website visitors.

1b The dashboard widget tag picks up the saved dashboard settings.

1 If a user with the Designer role clicks the **Deploy** link (located under a gadget), the "Single Gadget Deployment" screen opens and the gadget's metadata is defined in the "Tag" field.

2 Copy the dashboard defined in the "Tag" field to a page template. Then, publish the template to display the dashboard on the web page.

2 Copy the gadget defined in the "Tag" field to a page template. Then, publish the template to display the gadget on the web page.

Dashboard Deployment

If modifications are made to the gadget's metadata in the site gadget catalog, they are dynamically updated on the deployed gadget.

Product Slideshow

Men's PowerPlayer Tennis Shoe

If modifications are made to the dashboard, they are dynamically updated on the deployed dashboard.

Product Slideshow

Men's PowerPlayer Tennis Shoe
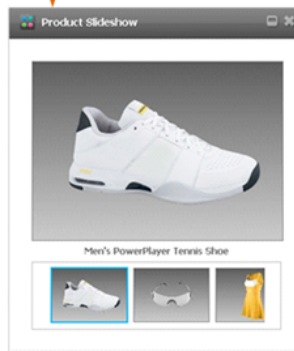
36.2 Deploying the Dashboard

The dashboard's deployment tag is located in the "Dashboard Deployment" screen. The tag specifies the dashboard's current gadgets, layout, color theme, appearance settings, authorized domain (if any), and language preference.

When the dashboard tag is deployed, visitors who access the dashboard are given their own instances of the dashboard. Each visitor can then personalize her own instance in the same way that the Gadgets application's users configure the dashboard (as shown in Section 35.1, "Configuring Dashboard Defaults").

> **Note:** Keep in mind the following:
>
> - To deploy the dashboard tag to a template, you will access the WebCenter Sites Admin interface (**Admin**). Ensure the Admin interface is assigned to the same site as the Gadgets User interface.
>
> - If Community-Gadgets is integrated with WebCenter Sites, you can also deploy the dashboard directly from the WebCenter Sites Contributor interface. For more information, see Chapter 12, "Working with Widgets and Gadgets in the Contributor Interface."

To deploy the dashboard

1. Log in to WebCenter Sites with designer credentials, select the site on which the Gadgets User interface is enabled, and then select the **Gadgets** icon.

2. In the menu bar, select **Dashboard** and then select **Deploy**.

   The "Dashboard Deployment" screen opens (shown in Figure 36–2).

Figure 36–2   'Dashboard Deployment' Screen

3. In the "Dashboard Deployment" screen, do the following:

    a. Enter values for the following fields:

        –   **Default Height, px** – Specify the height (in pixels) in which to display the dashboard on the website. 500 pixels is the minimum height that can be specified to render the dashboard properly on a web page.

- **User Session Bar** – Specify whether or not this instance of the dashboard will display a "Login" link to site visitors. For example, if your site already has a dedicated user session bar, you can hide the dashboard's user session bar by selecting the check box.

b. In the "Tag" field, copy (**Ctrl+C**) the dashboard tag.

4. Access the WebCenter Sites Admin interface, and insert the tag into the desired template:

Note: The dashboard requires a minimum page width of 980 pixels to render properly. Therefore, the template into which you wish to insert the dashboard tag should only call the site's header and footer, and not a side navigation.

---

a. In the menu bar, point to the down-arrow icon, located at the extreme right of the screen, to render the applications bar.

b. In the applications bar, click the WebCenter Sites **Admin** icon.

The WebCenter Sites Admin interface opens.

c. In the WebCenter Sites Admin interface, locate the template into which you wish to insert the dashboard's tag:

a. From the start menu options, click **Search**.

b. In the "Search" results list, select **Find Template**.

c. In the "Search for Templates" form, click **Search**.

d. In the "List of Templates" screen, select the template into which you wish to insert the dashboard tag.

d. In the template's "Inspect" form, click the **Edit** icon.

e. In the template's "Element" screen, insert (**Ctrl+V**) the widget tag into the "Element Logic" field in the exact location you want to display the dashboard.

Figure 36–3 Dashboard Tag Pasted Into a Template's "Element Logic" Field
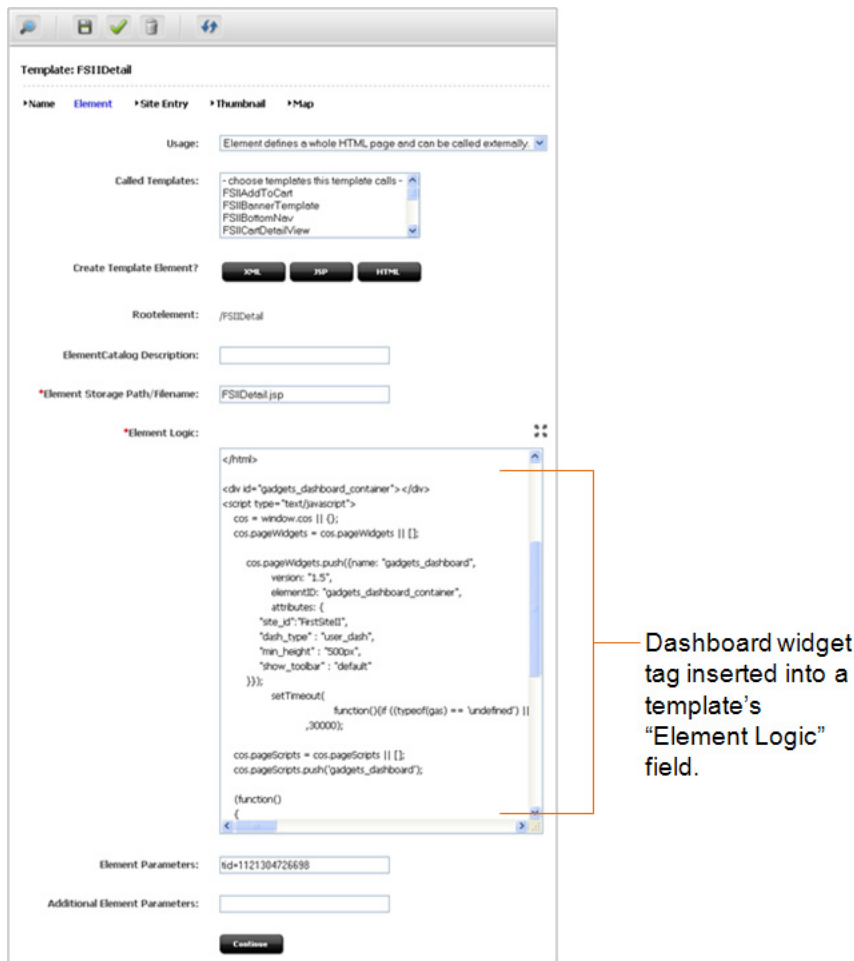
    f. In the asset's toolbar, click the **Save** icon.

5. If you inserted the dashboard tag into a template that also contains multiple gadgets and/or community widget tags, deploy the CSS tag. The CSS tag loads all widget CSS files along with the dashboard and gadget CSS files at the same time, decreasing the load time of a page on which multiple widgets and gadgets are deployed. For instructions, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

6. Preview the dashboard to ensure it is properly rendered on the website:

    a. Switch to the WebCenter Sites Contributor interface. In the menu bar, point to the down-arrow to open the applications bar. In the applications bar, select the **Contributor** icon.

    b. Find a Page asset that is rendered by the template containing the Dashboard tag. In the **Search** field, enter the desired search criteria and then click the **magnifying glass** button.

    A "Search" tab opens listing the results of your search.

    c. In the search results list, right click the desired Page asset and select **Preview** from the context menu.

    The Page's preview opens displaying the deployed dashboard.

7. Publish the template. For instructions, see the *Oracle Fusion Middleware WebCenter Sites Administrator's Guide*.

8. Access the website to view the dashboard on the page.

The dashboard you deployed should look similar to the dashboard in Figure 36–4.

Figure 36–4   Dashboard Displayed on a Web Page
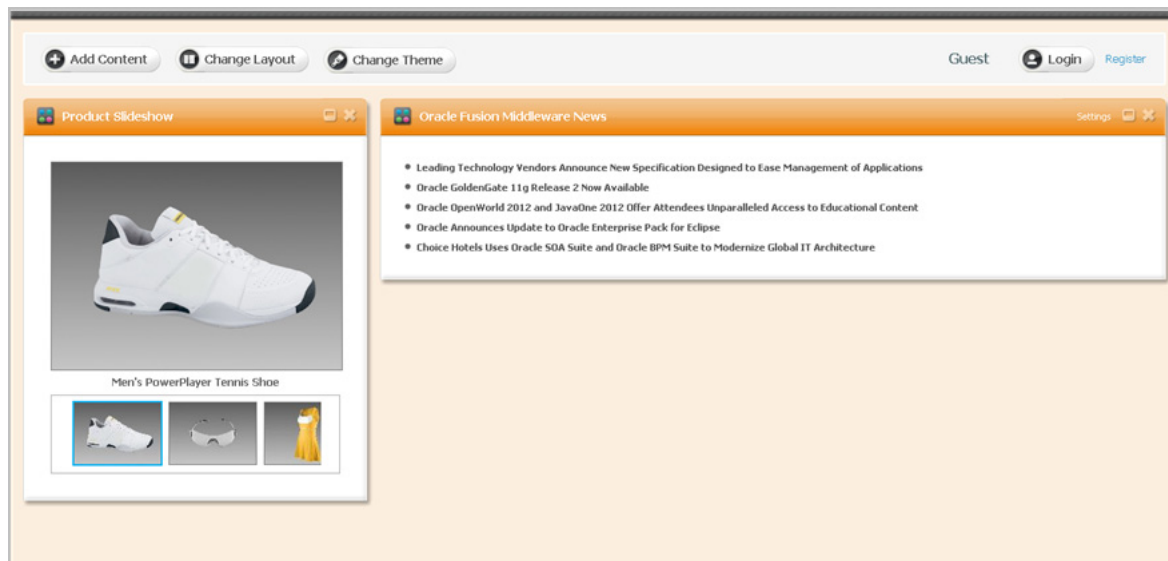
For instructions on customizing the dashboard on the website, see Section 37.2, "Working with the Dashboard as a Visitor."

36.3 Deploying a Single Gadget

A gadget's deployment tag is located in its associated "Single Gadget Deployment" screen. The tag specifies the gadget's metadata, appearance and language settings, and authorized domain (if any). When you insert a gadget tag into a template, and publish that template to the website, any asset rendered by that template will display the deployed gadget's content.

Note: Keep in mind the following:

- To deploy an individual gadget to a template, you will access the WebCenter Sites Admin interface (**Admin**). Ensure the WebCenter Sites Admin interface is assigned to the same site as the Gadgets User interface.

- If Community-Gadgets is integrated with WebCenter Sites, you can also deploy a gadget directly from the WebCenter Sites Contributor interface. For more information, see Chapter 12, "Working with Widgets and Gadgets in the Contributor Interface."

To deploy a single gadget

1. Log in to WebCenter Sites with designer credentials, select the site on which the Gadgets User interface is enabled, and then select the **Gadgets** icon.

2. In the "Catalog" screen, navigate to the gadget you wish to deploy and click the **Deploy** link, located under the gadget.

   The "Single Gadget Deployment" screen opens (shown in Figure 36–5).

Figure 36–5 'Single Gadget Deployment' Screen
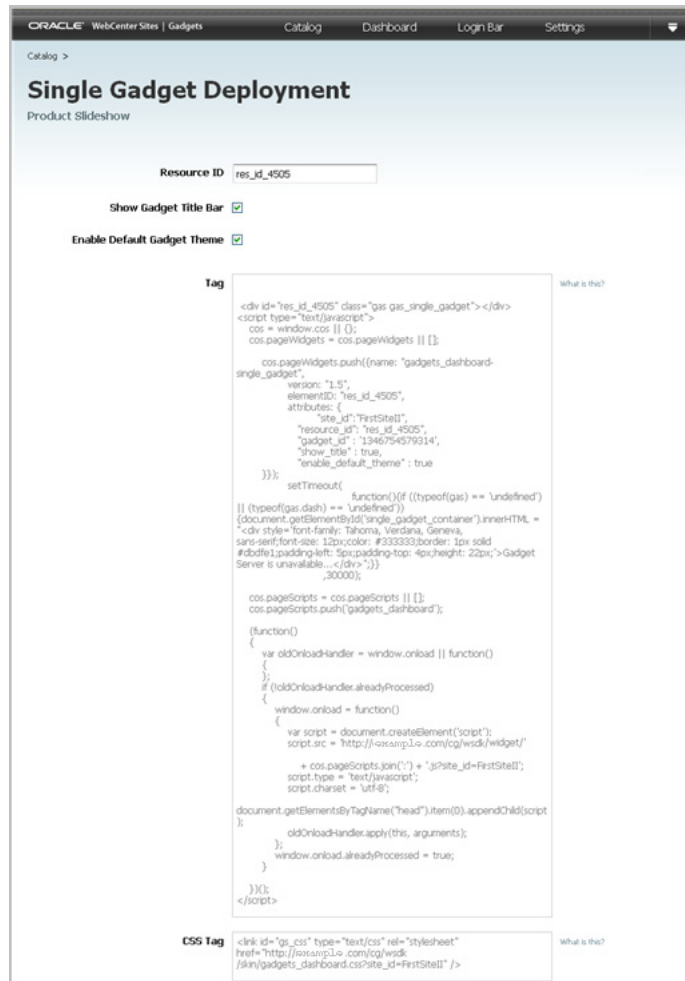
3. In the "Single Gadget Deployment" screen, fill in the following fields:

   – **Resource ID** – Specify a unique identifier for this particular gadget instance. The resource ID you assign to the gadget becomes the gadget's unique identifier on the website. If you want to deploy the same gadget with different settings on the same site, assign the gadget a different resource ID.

   – **Show Gadget Title Bar** – Specify whether this gadget will display a title bar along with its content.

   – **Enable Default Gadget Theme** – Select this checkbox if you want the gadget's content to be displayed on the website with a visible border, title bar, and so on. If this checkbox is not selected, only the gadget's content will be displayed.

4. Copy (**Ctr+C**) the gadget's widget tag.

5. Access the WebCenter Sites Admin interface, and insert the tag into the desired template. Preview how the gadget will be displayed on the website, publish the

template, and access the website to view the gadget on the page. For instructions, see steps 4 – 8 in Section 36.2, "Deploying the Dashboard."

6. If you inserted the gadget tag into a template that also contains a dashboard, multiple gadgets, and/or community widget tags, deploy the CSS tag. The CSS tag loads all widget CSS files along with the dashboard and gadget CSS files at the same time, decreasing the load time of a page on which multiple widgets and gadgets are deployed. For instructions, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

36.4 Modifying the Deployed Dashboard

If you modify the appearance of the dashboard after its deployment, your changes are automatically propagated to the dashboards of new visitors and anonymous visitors who have reset their browsers. Because authenticated visitors can save their personal settings, their dashboards remain unaffected by your changes.

To modify the deployed dashboard's defaults

1. Log in to WebCenter Sites with designer credentials, select the site on which the Gadgets User interface is enabled, and then select the **Gadgets** icon.

2. In the menu bar, select **Dashboard**, and then select **Preview**.

3. Make the necessary changes to the dashboard's default gadgets, layout, and color theme. For instructions about modifying the dashboard's defaults, see Section 35.1, "Configuring Dashboard Defaults."

4. In the dashboard's toolbar, click **Save** (shown in Figure 36–6).

Figure 36–6   Save Changes to Deployed Dashboard
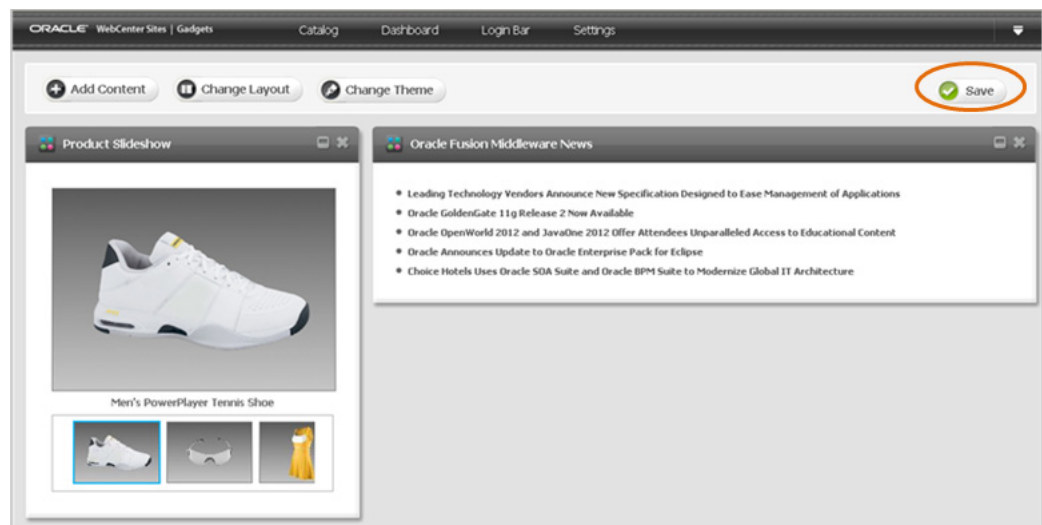
The modifications you made are automatically propagated to the dashboards of new visitors and anonymous visitors who have reset their browsers.

37

Testing Deployed Gadgets

This section provides information and instructions on working with the deployed dashboard and individual gadgets as a website visitor (authenticated and anonymous).

This chapter contains the following sections:

- Section 37.1, "Sample Dashboard Deployed on a Website"
- Section 37.2, "Working with the Dashboard as a Visitor"
- Section 37.3, "Sample Gadget Deployed on a Website"
- Section 37.4, "Modifying an Individually Deployed Gadget's Settings"

37.1 Sample Dashboard Deployed on a Website

The dashboard is a container for the gadgets enabled on a given site gadget catalog. A site gadget catalog and dashboard on the same instance of the Gadgets User interface share a dynamic relationship, meaning any gadget enabled in the site gadget catalog is automatically made available on the dashboard's gadget selection panel. When the dashboard is deployed to a web page, the gadgets, layout, and theme that were configured for the dashboard panel are displayed as defaults to visitors (as shown in Figure 37–1).

The deployed dashboard can be personalized, meaning visitors (authenticated and anonymous) can modify their own instances of the dashboard to display their preferred gadgets, layout, and color theme. Changes made by authenticated visitors are automatically saved. Changes made by guests persist only for the duration of the session. For information about personalizing the dashboard, see Section 37.2, "Working with the Dashboard as a Visitor."

Figure 37–1 Sample Dashboard Deployed on a Web Page
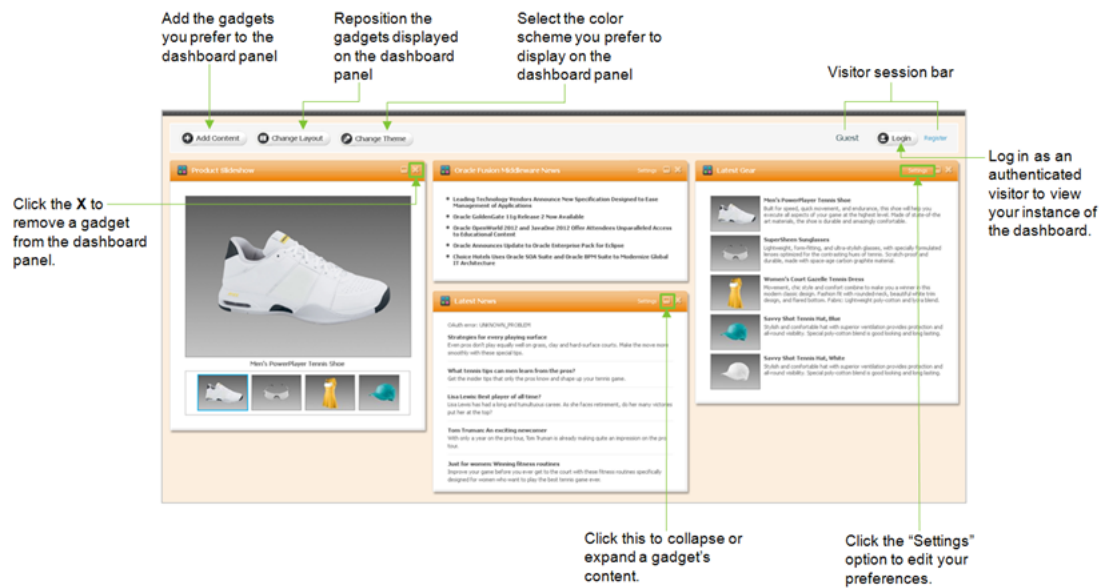
37.2 Working with the Dashboard as a Visitor

All visitors can personalize the default dashboard panel to display the gadgets, layout, and color theme they prefer. The changes made by an anonymous visitor are saved to that visitor's browser. These changes are temporary, and when the visitor resets her browser, the dashboard returns to its default appearance. Authenticated visitors have their own instance of the dashboard. When an authenticated visitor modifies the dashboard panel's appearance, the changes are saved to the Gadgets application server.

This section contains the following topics:

- Section 37.2.1, "Logging in to the Website"

- Section 37.2.2, "Personalizing the Dashboard"

- Section 37.2.3, "Modifying a Gadget's Visitor Preferences"

37.2.1 Logging in to the Website

When you log in to the website, you are presented with your own customizable instance of the dashboard.

To log in to the website

1. Access the web page on which the dashboard is deployed.

2. Click **Login**.

   The "Login" form (shown in Figure 37–2) opens above the dashboard panel:

Figure 37–2   Login Form

3. Fill in the "Username" and "Password" fields with your credentials for the website. **Log in credentials are case-sensitive**.

4. Click **Login**.

   Your own instance of the dashboard is displayed (as shown in Figure 37–3).

Figure 37–3   Personal Instance of the Dashboard

37.2.2 Personalizing the Dashboard

Your options for personalizing the dashboard panel are the following:

- Section 37.2.2.1, "Adding (or Removing) Gadgets to (from) the Dashboard Panel"

- Section 37.2.2.2, "Modifying the Layout of the Dashboard"

- Section 37.2.2.3, "Modifying the Color Theme of the Dashboard"

37.2.2.1 Adding (or Removing) Gadgets to (from) the Dashboard Panel

The gadget selection panel contains all the available gadgets, as thumbnails, that visitors can add to the dashboard panel. Adding gadgets to the dashboard panel configures the dashboard to display the content of those gadgets. If a visitor removes a gadget from the dashboard panel, that gadget will still be available from the dashboard's gadget selection panel, as a thumbnail.

To add gadgets to the dashboard panel

1. Access the web page on which the dashboard is deployed.

2. If you are an anonymous visitor, skip to step 3. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard.

3. In the dashboard's toolbar, click **Add Content**.

   The gadget selection panel opens above the dashboard panel (as shown in Figure 37–4).

Figure 37–4   Dashboard: Gadget Selection Panel
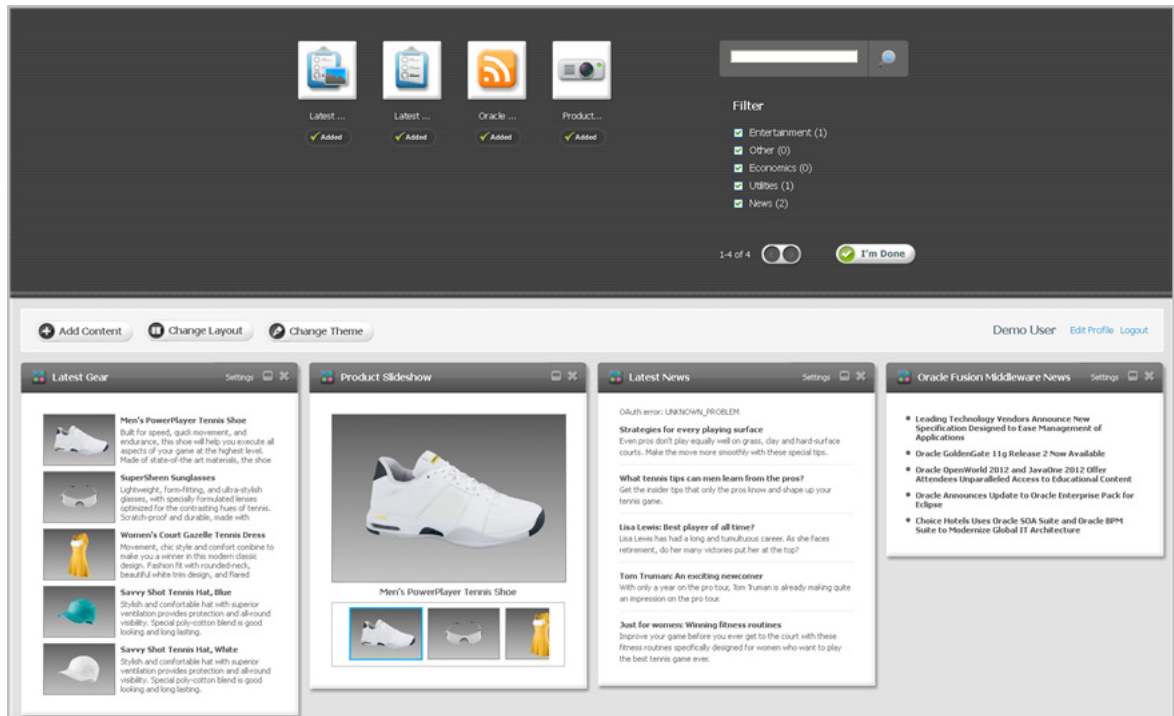
4. In the gadget selection panel, add the desired gadget to the dashboard panel:

   a. Navigate to the gadget whose content you wish to display on the dashboard panel.

   b. If you wish to preview the gadget's content before adding it to the dashboard panel, click the gadget's thumbnail image.

   c. Click **Add**.

   d. Click **I'm Done**.

   The gadget selection panel closes, and the added gadget's content is displayed on the dashboard panel.

5. If you wish to reposition a gadget on the dashboard panel, click the gadget's title bar and drag it to the desired slot on the dashboard panel.

To remove a gadget from the dashboard panel

1. Access the web page on which the dashboard is deployed.

2. If you are an anonymous visitor, skip to step 3. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard.

3. In the dashboard panel, navigate to the gadget you wish to remove from the dashboard panel, and click the **X** icon (located in the gadget's title bar).

   The gadget is removed from the dashboard panel, but is still accessible to the visitor from the gadget selection panel.

37.2.2.2 Modifying the Layout of the Dashboard

The layout panel enables visitors to reposition the gadgets that are displayed on the dashboard panel.

To modify the layout of the dashboard

1. Access the web page on which the dashboard was deployed.

2. If you are an anonymous visitor, skip to step 3. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard.

3. Click **Change Layout**.

   The layout panel opens above the dashboard panel (as shown in Figure 37–5).

Figure 37–5   Dashboard: Change Layout Panel
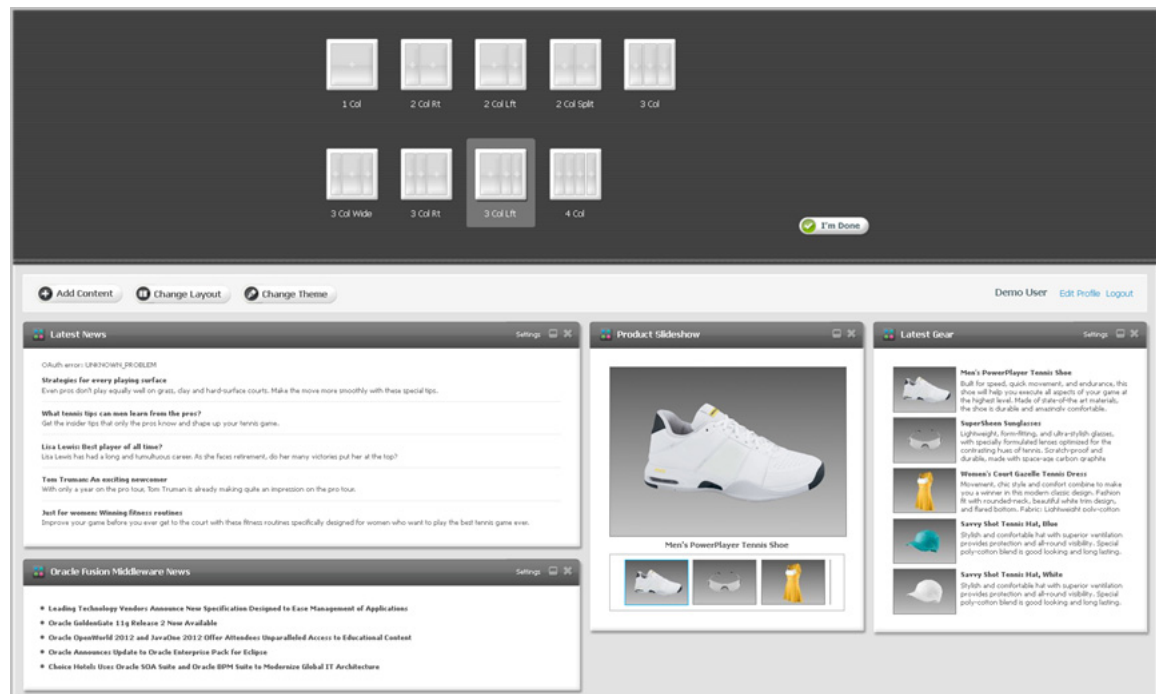
4. In the layout panel, select the layout you wish to apply to the dashboard panel.

5. Click **I'm Done**.

   The layout you selected is applied to the dashboard panel.

37.2.2.3 Modifying the Color Theme of the Dashboard

Visitors can manage the color scheme of the dashboard panel background and gadget title bars with the color options available from the dashboard's theme panel.

To modify the color theme of the dashboard

1. Access the web page on which the dashboard was deployed.

2. If you are an anonymous visitor, skip to step 3. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard.

3. Click **Change Theme**.

    The theme panel opens above the dashboard panel (as shown in Figure 37–6).

Figure 37–6   Dashboard: Theme Panel
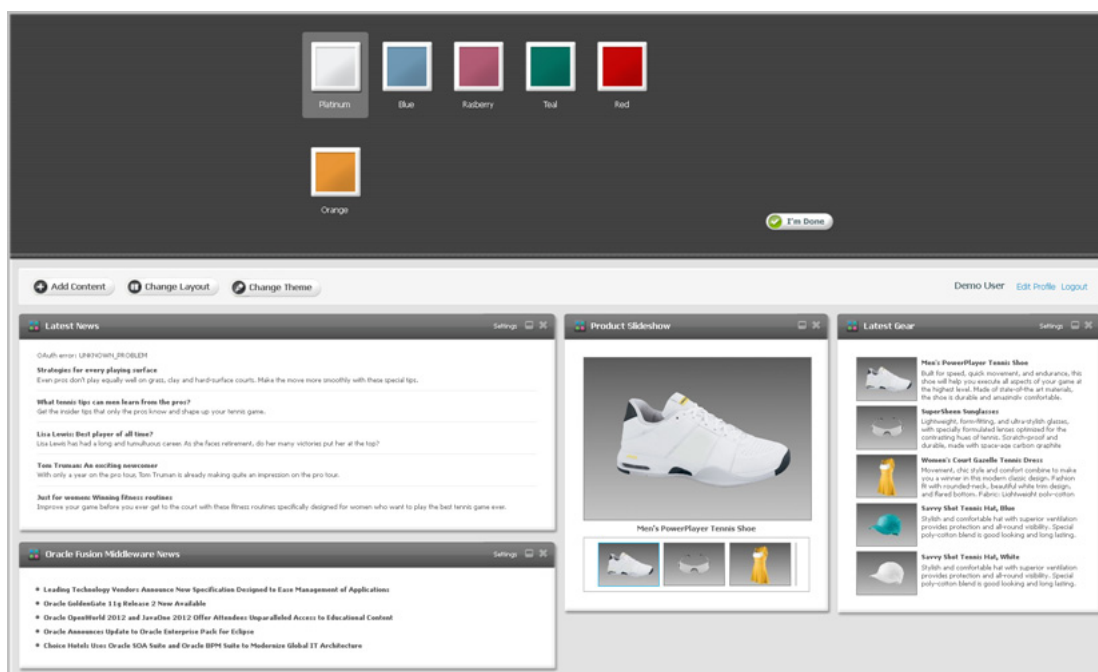
4. In the theme panel, select the color you wish to apply to the dashboard panel.

5. Click **I'm Done**.

    The color you selected is applied to the dashboard panel's background and the gadget title bars.

37.2.3 Modifying a Gadget's Visitor Preferences

Certain gadgets, depending on how the gadget was developed, provide visitors with a "Settings" option for editing visitor preferences. For example, a weather gadget may provide visitors with a locale option so the gadget will display the weather forecast for the location the visitor specifies.

To modify a gadget's visitor preferences

1. Access the web page on which the dashboard was deployed.

2. If you are an anonymous visitor, skip to step 3. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard.

3. In the dashboard panel, navigate to the desired gadget and select the **Settings** option on the gadget's title bar. For example, Figure 37–7 shows the modifiable settings for the Latest Gear sample gadget. (If the gadget does not have a **Settings** option, then the visitor preferences for that gadget are not modifiable.)

Figure 37–7 Visitor Preferences for the 'Latest Gear' Sample Gadget
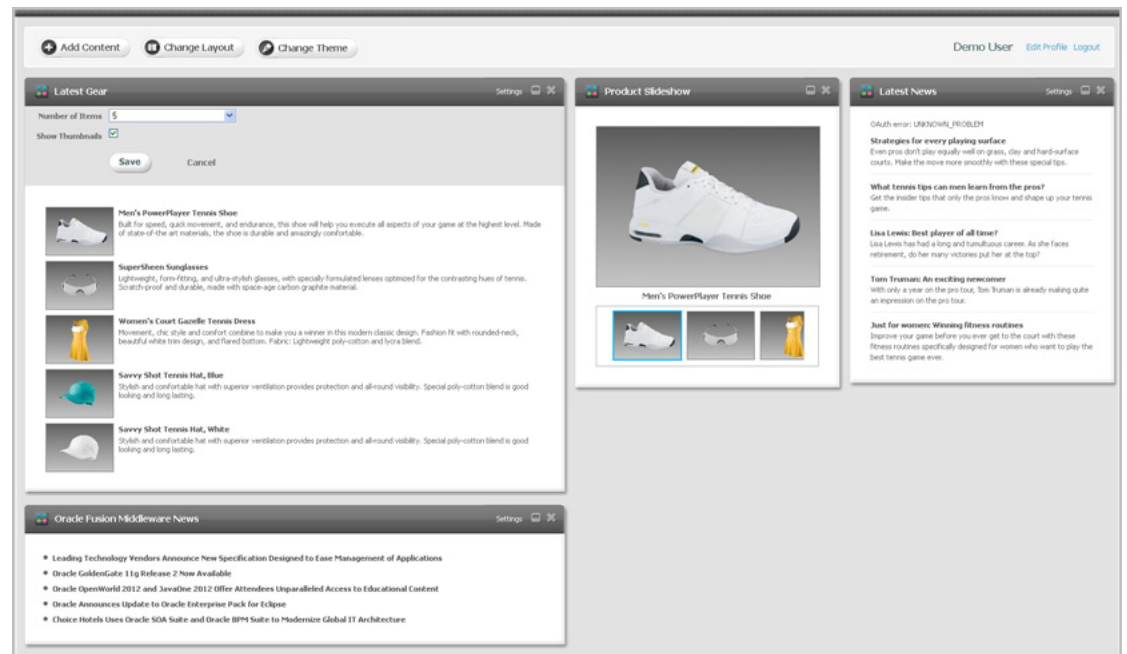
4. Select the desired preferences for the gadget. For example, the "Latest Gear" gadget enables visitors to select the number of items that will be rendered in its list.

5. Click **Save**, to save your preferences.

37.3 Sample Gadget Deployed on a Website

All gadgets that are enabled on a given site catalog can be deployed individually on web pages to display the gadget's content to visitors. This is because a site gadget catalog and the "Single Gadget Deployment" screen share a dynamic relationship on the same instance of the Gadgets User interface. When the gadget is deployed it displays the current settings and metadata configured for it in the Gadgets User interface. Figure 37–8 shows two gadgets deployed individually on a sample web page.

Figure 37–8   Individually Deployed Gadgets on a Web Page

37.4 Modifying an Individually Deployed Gadget's Settings

Individually deployed gadgets are displayed to all visitors (authenticated and anonymous). Certain gadgets enable visitors to modify the gadget's settings. All visitors can personalize the visitor preferences of a given gadget (depending on how the gadget was developed). For example, the Latest Gear sample gadget's **Settings** link enables visitors to display or hide the thumbnail images of the products listed in the content of the gadget. It also enables visitors to specify the amount of products the gadget displays at one time.

Figure 37–9   Latest Gear Gadget Displaying a 'Settings' Link
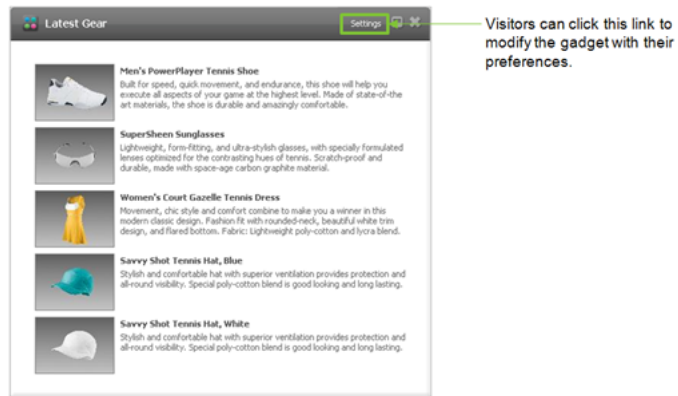
For instructions about working with a gadget whose settings can be modified, see Section 37.2.3, "Modifying a Gadget's Visitor Preferences."

Glossary

Anonymous Visitor

A Site Visitor who does not have credentials for logging in to the website. These visitors are also referred to as guests.

Authenticated Visitor

A Site Visitor with credentials for logging in to the website.

Auto-Moderation Filters

The configurable filters that can be applied to assist administrators and moderators with the moderation process (Restricted Words, Visitor Blacklist, and Visitor Whitelist).

CM Site

The content management site where the Community application is enabled. All comments, reviews, ratings, and poll votes submitted by site visitors are collected on this site.

Community Widget

Added site functionality provided by the Community application:

- Comments, Comments Summary, Links to Topics, Recently Commented, and Most Commented widgets

- Reviews, Reviews Summary, Links to Topics, Average Rating, Top Ranked Topics, Recently Reviewed, and Most Reviewed widgets

- Poll and Results widgets

- Stars Ratings, Thumbs Up/Down Ratings, Like It Ratings, Recommend Ratings, Average Rating, Recently Rated, and Most Rated widgets

- Login Bar widget

Community Widget Tag

The code that defines the widget's properties, visitors' permissions to use the widget, and the system on which visitors' input will be collected and stored. Administrators and designers deploy widget tags on web pages to display the widgets to site visitors.

CSS Tag

The tag that, when deployed, combines all the CSS files of the widgets deployed on a page into one CSS. This means that each widget's CSS is loaded at the same time, which reduces the amount of requests the system makes to load the page's content. This tag should only be deployed on a page on which multiple widget tags are deployed.

Custom Settings

The settings of a widget tag that are configured using the tag generator in the widget's deployment screen. Custom settings are temporary values that are saved only in a particular instance of the tag (they cannot be saved in the Community interface). As a result, each time a widget tag's settings are customized, the tag must be redeployed on the desired web pages.

Default Settings

A widget's saved settings. Default settings for the Comments, Reviews, and ratings (Stars, Thumbs Up/Down, Like It, and Recommend) widget tags can be reconfigured in the Permissions and Appearance configuration screens specific to the desired widget. When these settings are saved, the default tag is dynamically updated everywhere it is used. The default settings for all other widget tags are configured out-of-the-box and cannot be reconfigured.

Deployment

The process of inserting community widget tags into the desired template assets.

Designer

A Community interface user who can configure the default appearance of community widgets, create polls, and customize a given community widget tag with custom values. These users can also specify the domain on which community widget tags can be deployed and use the WebCenter Sites Admin interface to deploy community widget tags and publish the templates.

General Settings

The moderation, security, and language settings that Community interface users can configure for all community widgets of a given site.

Manual Moderation

The process of administrators and moderators manually approving, modifying, and/or deleting visitors' comments, reviews, and ratings.

Moderator

A Community interface user who can set visitor permissions to community widgets, and configure the moderation settings and the auto-moderation filters for community widgets. These users can also manually moderate comments, reviews, and ratings that are posted to web pages on which community widget tags are deployed.

SEO (Search Engine Optimization)

The process of optimizing the JavaScript based Comments and Reviews widgets. This process enables Comments and Reviews widgets to be displayed to site visitors using browsers set to disable JavaScript and allows search engines (such as *Google*) to look for search criteria within the content of the comments and reviews posted to your website.

Site Administrator

A site user who has administrative permissions to an entire site and its applications, including the Community application. These users have permissions to all Community interface functions, such as configuring the appearance of community widgets, setting visitor permissions to community widgets, managing general community widget settings, and deploying community widget tags on various web pages.

Site Visitor

Any visitor of the website.

Anonymous Visitor

A Site Visitor who does not have login credentials to the website. These visitors are able to view and temporarily personalize their instances of the Dashboard and the instances of individually deployed gadgets.

Authenticated Visitor

A Site Visitor with login credentials to the website. Each authenticated visitor has her own modifiable instance of the Dashboard on the website. Preferences set by authenticated visitors are automatically saved.

CM Site

A content management site.

Community-Gadgets Application Site

The site where the Global Gadget Catalog Interface is enabled. This site is specified during the Community Gadgets installation process. For more information, see the *Oracle Fusion Middleware WebCenter Sites Installation Guide*.

Dashboard

The Gadgets application's container interface, which is used to deliver and display multiple Gadgets to site visitors. The dashboard displays the Dashboard Panel where selected gadgets are displayed at full size, and a toolbar that opens a Dashboard Customization Workspace which is used to personalize the dashboard panel. The workspace presents gadgets as thumbnails, which users and visitors can expand and place on the dashboard panel. The workspace also provides options for modifying dashboard layout and color scheme. The dashboard is available from the Gadgets User Interface.

Dashboard Customization Workspace

The workspace that opens above the Dashboard Panel when you click one of the toolbar options on the Dashboard. The option you select determines the panel that is displayed. See also gadget selection panel, layout panel, and theme panel.

Dashboard Panel

The space that displays the gadgets users and visitors select from the Dashboard Customization Workspace. The gadgets are displayed at full size. The dashboard panel can be configured via the toolbar options to display gadgets in a preferred layout and color scheme.

Dashboard Widget Tag

The Deployment tag that is configured with default settings for the Deployment. General Administrators, Site Administrators, and Designers deploy this tag on web pages to display the default dashboard to Site Visitors and provide them with personalization tools for their dashboard instances.

Deployment

The process of inserting a Single Gadget Widget Tag or the Dashboard Widget Tag into a template asset, and then publishing the template to the website.

Designer

A user with privileges to manage the appearance of the default Dashboard and deploy the Dashboard Widget Tag and Single Gadget Widget Tags on web pages.

Enabling Gadgets

To make gadgets that are registered with the Global Gadget Catalog available on Site Gadget Catalogs.

FW_CSGadget

The asset type of the Gadgets application's sample gadget assets. The FW_CSGadget asset type's description is CS-Based Gadget. For detailed information about creating gadgets, see the *Oracle Fusion Middleware WebCenter Sites Developer's Guide*.

Gadget

A remote piece of functionality that is defined by a gadget descriptor XML file and delivers dynamic content from one website to another.

Gadget Descriptor URL

The URL of a gadget's descriptor XML file. The file contains the code responsible for rendering the gadget.

Gadget Selection Panel

One of three options available on the Dashboard Customization Workspace. Clicking this option presents gadgets as thumbnail images, which users and website visitors can select and display as full-size gadgets on the Dashboard Panel. See also layout panel and theme panel.

Gadgets User Interface

The Gadgets application that runs on a site other than the site on which the Global Gadget Catalog Interface is enabled. This interface provides a site's administrators and designers with a site gadget catalog, a dashboard, "Permissions" and "Settings" screens, a single gadget deployment screen, and a dashboard Deployment screen.

General Administrator

A user who has administrative privileges to the entire Web Experience Management (WEM) Framework. These users can enable and manage the Global Gadget Catalog Interface by assigning the Gadgets application to the site specified in the {cs_site} variable during the Gadgets application's installation process. They can also enable the Gadgets User Interface by assigning the Gadgets application to sites other than the site on which the global gadget catalog interface is enabled.

Global Gadget Catalog

This gadget catalog is provided by the Global Gadget Catalog Interface, and is managed by General Administrators. It is the central repository for storing gadgets and distributing gadgets to various sites. When gadgets are registered to the global gadget catalog, they can be enabled on a CM Site via Site Gadget Catalogs, provided by the Gadgets application running on those sites. (Gadgets can also be registered directly to a site gadget catalog.)

Global Gadget Catalog Interface

The Gadgets application that runs on the site specified in the Community-Gadgets Application Site variable during the installation process of the Gadgets application. This interface provides General Administrators with the Global Gadget Catalog.

Registering Gadgets

The process of specifying a gadget's metadata and Gadget Descriptor URL in the Global Gadget Catalog Interface or a Gadgets User Interface.

Gadget Layout Panel

One of three options available on the Dashboard Customization Workspace. Clicking this option enables users and website visitors to reposition the gadgets that are displayed on the Dashboard Panel and adjust their width. See also gadget selection panel and theme panel.

Single Gadget Widget Tag

The Deployment tag that is configured with the settings of a single gadget. In the "Single Gadget Deployment" screen, administrators and designers choose the gadget they wish to deploy from the "Gadget" menu and then deploy the selected gadget's tag on web pages to display an individual instance of that gadget to visitors.

Site Administrator

A user who is an administrator of her assigned content management site and its applications, including the Gadgets application. These users have permissions to all Gadgets User Interface functions. However, their main purpose is to manage the CM Site's gadgets in the Site Gadget Catalog.

Site Gadget Catalog

This gadget catalog is specific to the site on which the Gadgets User Interface is enabled. It is provided by the Gadgets User interface for the purpose of storing the site's gadgets and making them available on the Dashboard and for single gadget deployment. A site gadget catalog, its dashboard, and its "Single Gadget Deployment" screen are dynamically associated. Site gadget catalogs are managed by site administrators.

Site Visitor

Any visitor of the website. See also Anonymous Visitor and Authenticated Visitor.

Theme Panel

One of three options available on the Dashboard Customization Workspace. Clicking this option enables users and website visitors to customize the color scheme of the Dashboard Panel. See also Gadget Selection Panel and Gadget Layout Panel.