

## **Oracle® Fusion Middleware**

Using Oracle WebCenter Sites

12c (12.2.1)

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Describes how to use the Contributor interface to create and manage content within WebCenter Sites, including websites tailored for mobile devices. This guide also describes how to use Visitor Services, Engage, and A/B Testing to gain valuable website insights, and field-test, personalize, and optimize visitors' online experiences.

Oracle Fusion Middleware Using Oracle WebCenter Sites, 12c (12.2.1)

E49202-02

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# Preface

This guide contains information about using Oracle WebCenter Sites to create and manage desktop and mobile websites, personalize them with targeted content to enhance visitor experiences on the website, and gather visitor feedback on their success.

## Audience

This guide is intended for users whose expertise is rooted in the content of a website, not in the software used to manage it. In this guide, these users are categorized as content contributors and marketers. For a complete description of each type of WebCenter Sites user, see [Who Are the WebCenter Sites Users?](#)

This document is also helpful to individuals who support these users, 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>.

## Product Accessibility

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

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

For information about keyboard shortcuts for the Oracle WebCenter Sites: Contributor interface, see [Keyboard Shortcuts for the Contributor Interface](#).

## Access to Oracle Support

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

## Related Documents

For more information, see the following documents in the Oracle WebCenter Sites Release 12c (12.2.1) documentation set:

- *Oracle Fusion Middleware WebCenter Sites Release Notes*
- *Oracle Fusion Middleware Administering Oracle WebCenter Sites*
- *Oracle Fusion Middleware Developing with Oracle WebCenter Sites*
- *Oracle Fusion Middleware Installing Oracle WebCenter Sites*

## Conventions

The following text conventions are used in this document:

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

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# What's New in This Guide

Oracle WebCenter Sites 12c (12.2.1) includes the following new features:

Feature	Description	See These Sections
Visitor Services	Visitor Services allows WebCenter Sites pages to benefit from visitor data captured across multiple external platforms, such as Google, Facebook, major CRM systems, and custom data sources. Captured visitor activity data can be aggregated from multiple repositories into unified visitor profiles that WebCenter Sites marketers can use to improve their visitor segmenting and per-segment content targeting. Progressive profiling continually enhances previously captured visitor data with new data, increasing targeting accuracy as visitors spend more time on the site. These visitor profiles are also accessible to external applications.	<a href="#">Understanding WebCenter Sites: Visitor Services</a>

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Feature	Description	See These Sections
A/B Testing	<p>A/B testing enables marketers to field-trial individual pieces of content against one another to determine which commands the highest visitor preference. Accessible directly from the Contributor interface, A/B testing bestows complete control of the test on the marketer and provides the choice to use content, presentation, or a mix of both as either test variant. Marketers can choose the criteria for starting the test, qualifying the success of the test, and ending the test. Once a test is under way, interactive, in-context reporting allows marketers to track the performance of each test in real time directly in the target page, stop or promote a specific test variant, and to continue to the test reporting interface to view more comprehensive performance metrics. A/B testing is fully integrated into WebCenter Sites, eliminating the need to license and train for a separate third-party testing tool, providing a single, integrated author-build-test-deliver solution.</p>	<a href="#">Working with A/B Testing</a>
Contributor Publishing	<p>Users who hold the Publisher role can now publish pages and assets directly from the Contributor interface, eliminating the need to involve the WebCenter Sites administrator for smaller publishing jobs.</p>	<a href="#">Publishing an Approved Asset</a>
My Tags	<p>A new tab in the My Work tree in the Contributor interface displays tags that you have assigned to assets. Selecting a tag displays a list of assets that have been assigned that tag and provides access to asset operations, such as publishing.</p>	<a href="#">Tagging Assets</a>

Feature	Description	See These Sections
Inherited Tab	The <b>Inherited</b> tab, available in the asset's view form, displays asset attributes inherited by the asset from parent assets.	<ul style="list-style-type: none"> <li>• <a href="#">Asset Associations</a></li> <li>• <a href="#">Assigning a Parent Asset to a Child Asset</a></li> <li>• <a href="#">Workspace: Asset Tab</a></li> </ul>
RTL (Right-to-Left) Orientation	The Contributor interface now supports Right-to-Left (RTL) orientation for use with RTL-based languages, such as Arabic.	This feature will be automatically available if your Administrator has configured your environment to support it.
Accessibility Enhancements	WebCenter Sites now supports configurable accessibility features compliant with Oracle Accessibility Guidelines 2.0, including screen reader support, customizable keyboard shortcuts, seamless keyboard-based navigation, and high-contrast mode for Contributor and Admin interfaces.	<a href="#">Keyboard Shortcuts for the Contributor Interface</a>

The following features have been deprecated in this release:

- WebCenter Sites Gadgets and Gadget Server
- WebCenter Sites Native authentication in Community/Gadgets
- WebCenter Sites Analytics 2.5
- WebCenter Sites Content Integration Platform - EMC Documentum
- WebCenter Sites Content Integration Platform Filesystem
- WebCenter Sites Content Integration Platform Sharepoint
- WebCenter Sites Janrain Integration
- WebCenter Sites Netomat Mobility Server
- SOAP-based web services
- Page Debugger

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**Note:** Use IDE integration for JSP debug capabilities. DebugServlet is not deployed.

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- Sites Desktop
- Sites DocLink





# Part I

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## Getting Started

This part provides an overview of using the Oracle WebCenter Sites interfaces.

This part includes the following chapters:

- [Introduction to Oracle WebCenter Sites](#)
- [Logging In](#)
- [Planning to Work with WebCenter Sites](#)



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# Introduction to Oracle WebCenter Sites

This chapter provides a general introduction to Oracle WebCenter Sites as it applies to content contributors, website solicitors, website moderators, and marketers.

For introductory information about Oracle WebCenter Sites, see these topics:

- [What Is Oracle WebCenter Sites?](#)
- [Who Are the WebCenter Sites Users?](#)
- [What You Can Do With Oracle WebCenter Sites](#)
- [Which Content Management Functions Can You Perform?](#)
- [How is Content Defined in WebCenter Sites?](#)
- [What is a Content Management \(CM\) Site?](#)
- [What Sample Sites Are Used In This Guide?](#)

## 1.1 What Is Oracle WebCenter Sites?

Oracle WebCenter Sites is a Web Experience Management system. It helps you build desktop and mobile websites, personalize them with targeted content, gather feedback on their success, analyze visitor interactions with the website, and test changes to your website based on your visitors' preferences.

The Oracle WebCenter Sites: Contributor interface offers a set of features for building and managing the components of your website. In addition, features such as Oracle WebCenter Sites: A/B Testing are available to help users measure their website's success so they can enhance it accordingly.

## 1.2 Who Are the WebCenter Sites Users?

The interfaces and features users can work with are determined by the roles assigned to them by the WebCenter Sites administrator.

Based on these roles, WebCenter Sites users can be categorized into one or more of the following types:

- **Content contributor** – anyone who is responsible for website content.
- **Marketer** – anyone who personalizes web pages with promotions and recommendations, analyzes visitor traffic, and measures website effectiveness.

## 1.3 What You Can Do With Oracle WebCenter Sites

What you can do with WebCenter Sites depends on the roles you have been assigned.

- [Contribute Content to Desktop and Mobile Websites](#)

- [Personalize the Website](#)
- [Create Corporate Blogs](#)

### 1.3.1 Contribute Content to Desktop and Mobile Websites

WebCenter Sites enables content contributors to create, manage, and approve content for publishing to mobile and desktop websites with the Contributor interface.

The Contributor interface features drag and drop page construction, tools that enable content contributors to provide content for both desktop and mobile websites, and a preview function for previewing desktop websites and mobile websites in the context of mobile devices or on actual mobile devices (such as an iPhone). If the workflow feature is enabled, content contributors can collaborate in workflows to move content from its creation point to the website. From the Contributor interface, content contributors can also create the website's navigation. Your ultimate goal in working with this interface is to approve your content and website navigation, or have them approved by other content contributors. Once content is approved, it can then be published to the website.

Administrators can integrate the Content application with the Contributor interface to enable content contributors to work with content from Content Server directly in the Contributor interface.

The Contributor interface can also be customized by developers to provide features specific to your company's business needs.

### 1.3.2 Personalize the Website

In addition to providing basic website building tools, the Contributor interface provides, it also offers Oracle WebCenter Sites: Engage.

Engage is a demographic feature that marketers use to gather and evaluate information about website visitors, define segments, and create personalized recommendations and promotions. This is particularly useful when marketers want to use site visitor information to create and display personalized content placements and promotional offerings for each visitor.

### 1.3.3 Create Corporate Blogs

If the Community Blogs module is installed, content contributors can create corporate blog pages for the website directly from the Contributor interface.

## 1.4 Which Content Management Functions Can You Perform?

That depends on how your Oracle WebCenter Sites system is configured and on your job requirements. For example, writers for a sports newspaper would have access to the Contributor interface to create articles, but after saving and closing them, may not be able to re-open and edit them. An editor for this newspaper may have permissions to edit articles and approve them for publishing from the Contributor interface, but not to create them. A marketing specialist would be responsible for working with the Engage and A/B Testing features in the Contributor interface, but they might not have permissions to create, edit, or approve articles.

Your WebCenter Sites system is configured by your developers and administrators. In WebCenter Sites, your developers use CM sites to design the website. They create and enable the data models (source of content-entry and editorial forms that contributors and marketers use to provide website content) for each site, and establish security by creating roles. Your administrators configure names for the sites on your system, and

then use roles to assign interfaces and users to those sites. Your assigned roles in a site manage your access to the interfaces assigned to that site and the functions you can perform in those interfaces.

## 1.5 How is Content Defined in WebCenter Sites?

In the Contributor interface, a piece of content is referred to as an asset. For example, articles, images, and videos are all considered assets in the Contributor interface. Assets are instances of asset types. An asset type is an object that is used to create a type of asset. Your administrator determines the asset types that are available in the site to which you are assigned. Your job is to create assets from these types. The types of assets you can create is determined by the roles assigned to you by your administrator and by the type of site you are creating. For more information about assets and asset types, see [Content: Asset Types and Assets](#).

## 1.6 What is a Content Management (CM) Site?

A content management (CM) site is the backend for the website or one of its sections, and 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). For more information, see [Site Design](#).
- 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. For information about accessing the sites to which you are assigned, see [Which Sites Do You Have Access To?](#)

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 website, 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.

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**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.

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## 1.7 What Sample Sites Are Used in This Guide?

Procedures in this guide use the avisports and FirstSiteII sample sites to illustrate how to use content management functions in the Contributor interface.

You have access to these sample sites only if they were installed with your WebCenter Sites system or you are working with a JSK. If no sample sites are 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 illustrates the features in the Contributor interface such as creating and editing assets, previewing assets, linking assets, approving and publishing assets, finding and organizing assets, tracking assets with revision tracking, and creating a site's navigation.
- **FirstSiteII:** An online electronics retail site that includes articles, images, a product catalog with several entries, documents, and sample user accounts. In this guide, FirstSiteII illustrates workflow, multilingual, and future preview features in the Contributor interface. FirstSiteII is also used to describe Engage and the process of creating and working with segments, recommendations, and promotions in the Contributor interface.

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

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## Logging In

You can log in to Oracle WebCenter Sites, select a site to which you are assigned, and work with the applications assigned to that site. You can also retrieve a forgotten WebCenter Sites password, edit your WebCenter Sites user profile, and log out of WebCenter Sites.

For information about logging in, see these topics:

- [Logging in to Oracle WebCenter Sites](#)
- [Resetting a Forgotten WebCenter Sites Password](#)
- [Editing Your Oracle WebCenter Sites Profile](#)
- [Logging out of WebCenter Sites](#)

### 2.1 Logging in to Oracle WebCenter Sites

Follow the steps in this section to log in to Oracle WebCenter Sites, select a site to which you are assigned, and start working in the Oracle WebCenter Sites: Contributor and Community interfaces.

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:**

For login information, see your WebCenter Sites administrator for the following: WebCenter Sites URL, your user name and password, and the list of supported browsers.

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The Oracle WebCenter Sites login form opens.

2. Enter your username and password into the login form.

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

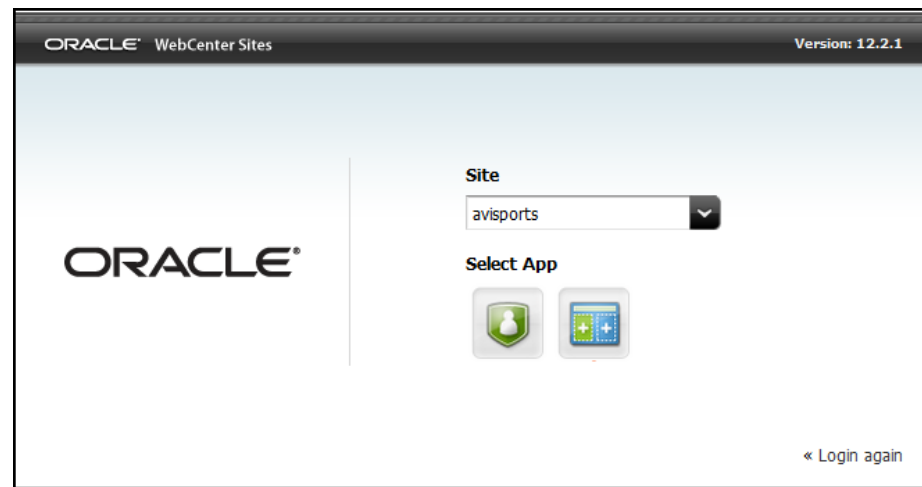
3. Click **Login**.

If you are logging in for the first time, the site select form opens; otherwise, you are logged in to the site and application you last visited.

4. In the **Site** drop-down list, select the site hosting the application in which you want to work.

When you select a site, the applications assigned to that site are displayed as icons under the **Site** field (as shown in [Figure 2-1](#)).

**Figure 2-1** *Select an Application*



5. Select the icon representing the application you want to work with. Your roles in the selected site determine which applications you have access to.

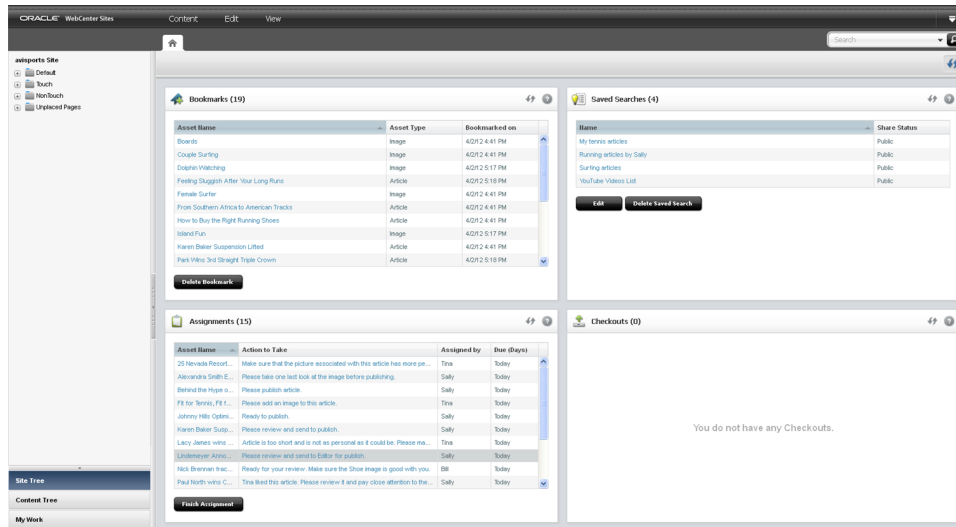
If you are assigned the `SitesUser` role, you will see the **Contributor** icon, which opens the Contributor interface. See [If You Selected the Contributor Icon](#).

### 2.1.1 If You Selected the Contributor Icon

When you select the **Contributor** icon, the Contributor interface loads. Your assigned roles determine your permissions to Contributor interface functions.

[Figure 2-2](#) shows an example of the Contributor interface for the avisports sample site.



**Figure 2-2 Contributor Interface for the avisports Sample Site**

## 2.2 Resetting a Forgotten WebCenter Sites Password

You can log in to Oracle WebCenter Sites if you have forgotten your password.

To log in to Oracle WebCenter Sites if you have forgotten your password:

1. In the login form, click the **Forgot password?** link, located below the **Password** field.

An email form opens, addressed to your WebCenter Sites administrator.

2. In the email form, specify that you have forgotten your WebCenter Sites credentials and then click **Send**.

The email is sent to your WebCenter Sites administrator. The administrator will then send you an email containing a new password.

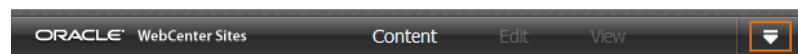
3. Use the new password to log in to WebCenter Sites, and then, for security purposes, access your WebCenter Sites profile and change the password. For instructions, see [Editing Your Oracle WebCenter Sites Profile](#).

## 2.3 Editing Your Oracle WebCenter Sites Profile

Each WebCenter Sites user has a WebCenter Sites profile, set up by the administrator.

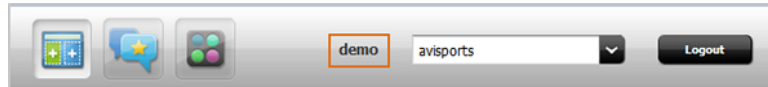
You can edit your profile information by doing the following:

1. From the Contributor interface, click the **down-arrow** in the menu bar (shown in [Figure 2-3](#)) to open the applications bar.

**Figure 2-3 Down Arrow in the Menu Bar for the Contributor Interface**

2. In the applications bar, click your user name (shown in [Figure 2-4](#)).

**Figure 2-4 Applications Bar: Click Your User Name**



The Edit Profile form opens (shown in [Figure 2-5](#)).

**Figure 2-5 Edit Profile Form**

3. In the Edit Profile form, you can make the following changes:
  - To change your profile image, in the **Image Preview** field, click **Browse** and then select the image you want to assign to your profile.
  - To add or change your email address, use the **Email** field.
  - To change your assigned locale, use the **Locale** drop down field.
  - To change your assigned time zone, use the **Time Zone** drop-down field.
  - To change your password, enter your current password in the **Old Password** field, and your new password into the **New Password** and **Confirm Password** fields.
4. Click **Save and Close**.

The Edit Profile form closes and the interface from which you accessed your profile is re-displayed.

## 2.4 Logging out of WebCenter Sites

Log out of WebCenter Sites to end your session.

To log out of WebCenter Sites:

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

You are now logged out of WebCenter Sites.



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## Planning to Work with WebCenter Sites

Planning is key to building a successful website with WebCenter Sites. Before you begin creating the content for your website, you should ask: What is the function or main purpose of the site? What type of site will you be creating: marketing, informational, social, or other? What permissions are you assigned in the site? Which interfaces are enabled on the site and which of those interfaces do you have permissions to work with?

For an overview of the general steps you should consider before using WebCenter Sites to build your company's website, see these topics:

- [Which Sites Do You Have Access To?](#)
- [Which Interfaces Can You Work With?](#)
- [Which Type of User Are You?](#)
- [What Type of Site Are You Creating?](#)
- [Who Creates the Website's Navigation?](#)
- [Does Your Site Support Multilingual Content?](#)
- [Will There Be Mobile Versions of the Website?](#)
- [Who Publishes Your Content to the Website?](#)
- [Is Revision Tracking Enabled on Your Site?](#)
- [Are You Participating in a Workflow?](#)

### 3.1 Which Sites Do You Have Access To?

When you first log in to WebCenter Sites, the first piece of information you need to know is which content management (CM) sites you can access.

Access to CM sites is determined by the roles assigned to you by your WebCenter Sites administrator. You can create content only in the sites in which you are assigned roles.

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**Note:**

Content management (CM) sites are the back end for your company's websites or one of its sections. For detailed information about CM sites, see [What is a Content Management \(CM\) Site?](#)

---

The following are ways to determine your assigned roles in a site:

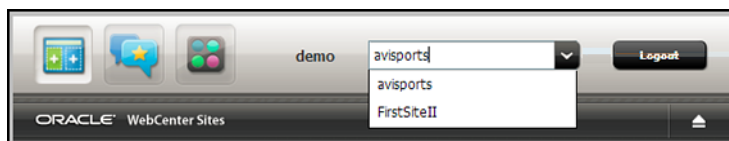
- When you log in to WebCenter Sites for the first time, the site select form is displayed to you. Click the **Site** drop-down menu to see a list of all the sites in which you are assigned roles (as shown in [Figure 3-1](#)).

**Figure 3-1 Login Form: Site Drop-Down List**



- When you are logged in to WebCenter Sites, and working in one of the interfaces, open the applications bar and then expand the **Sites** menu to see a list of sites in which you are assigned roles (as shown in [Figure 3-2](#)).

**Figure 3-2 Applications Bar: Sites Menu**



- Contact your WebCenter Sites administrator for information about the sites in which you are assigned roles.

## 3.2 Which Interfaces Can You Work With?

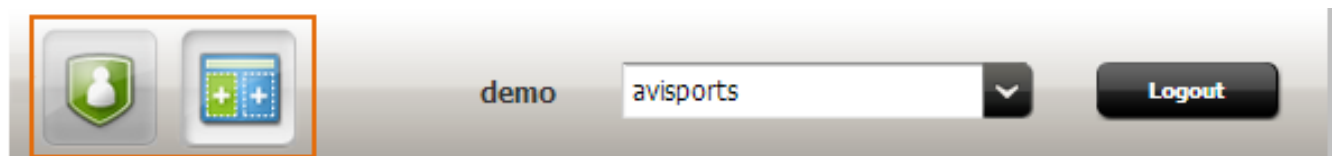
The interfaces you can use to work with a site are determined by the interfaces the administrator has enabled for the site and your assigned roles in the site.

WebCenter Sites provides the Oracle WebCenter Sites: Contributor interface. Not only do your assigned roles determine which interfaces you have access to, but they also determine the functions you can perform in these interfaces.

The following are ways to determine the interfaces to which you have access:

- When you log in to WebCenter Sites for the first time, and select the site you want to work with, a **Select App** section is displayed and shows the icons for the interfaces to which you have access (as shown in [Figure 2-1](#)).
- When you are logged in to WebCenter Sites, and working in one of the interfaces, open the applications bar to see the icons of all the interfaces you can access to work with that site (as shown in [Figure 3-3](#)).

**Figure 3-3 Applications Bar: Interface Icons**



- Contact your WebCenter Sites administrator for information about the interfaces you have access to.

### 3.3 Which Type of User Are You?

Typically, your administrator will inform you of the roles you are assigned in a site, the interfaces you can access for that site, and the interface functions you can work with to help you build and personalize the website, analyze visitor interactions with it, or measure its effectiveness.

Your assigned roles in the site determine the parts of the website you are responsible for. In WebCenter Sites, users are categorized as either content contributors or marketers (a user can also hold both roles simultaneously). You can determine which type of user you are by the interfaces and interface functions you have access to.

For information about your responsibilities for the website, depending on the type of user you are, see these topics:

- [Are You a Content Contributor?](#)
- [Are You a Marketer?](#)

#### 3.3.1 Are You a Content Contributor?

If you are a content contributor, you have access to the Contributor interface and are responsible for building the website. This entails having permissions to create, edit, or delete content for the website. You may also have permissions to approve content, publish content, build the website's navigation, or participate in a workflow process.

For example, if you have permissions to create website content, you have access to the **New** option in the Contributor interface. The **New** option lists all the asset types, enabled by your administrator, that you can use to create assets for the site. You can then apply a template, created by developers, to the asset you are creating to provide the layout in which the content will be displayed on the website. You might also have permissions to preview your content to verify the applied layout is suitable for it, before your administrator publishes it. In certain cases, your administrator might grant you publishing permissions so you can publish your own content from the Contributor interface.

#### 3.3.2 Are You a Marketer?

If you are a marketer, you are responsible for gathering and evaluating data about website visitors, to effectively create product placements and promotional offerings that are shown to visitors based-on the data you collect.

If this is the case, then you have access to the Contributor interface and are responsible for working with Oracle WebCenter Sites: Engage assets (see [Working with Engage Assets](#) for more information).

You can use the Oracle WebCenter Sites: A/B Testing feature to test the changes you are making to a web page against the current version.

### 3.4 What Type of Site Are You Creating?

The expectations your company has for your site impacts the content of the site and the additional features you can add to it.

For example, in an e-commerce site you would primarily create product descriptions, special offers, photos, and videos for your company's merchandise. You can then determine that the site would benefit from customer feedback, such as allowing

visitors to comment on or rate the products your company sells. Another example would be a branding site. This is a company-oriented site in which you would most likely provide contact information for your company, create news feeds and articles about your company, and possibly add a link to the site for visitors to sign up for your company's newsletter (if available).

For information about the type of site you are creating and the type of content you will be creating for the site, contact your WebCenter Sites administrator.

### 3.5 Who Creates the Website's Navigation?

Visitors use a website's navigation to browse to and locate content.

WebCenter Sites uses a hierarchical model for determining a website's navigation. That is, the order in which pages are displayed on your website. Depending on how your system is set up, either developers or content contributors create the website's navigation.

If you are a content contributor and you have permissions to create the website's navigation, you can then use the **Site Tree** in the navigation pane of the Contributor interface to place pages in the appropriate order in a site navigation. Typically you designate a Home page and sub pages for the website. The order in which you place the pages under a site navigation in the **Site Tree** determines the order in which links to those pages are displayed in the website's navigation.

### 3.6 Does Your Site Support Multilingual Content?

Does your organization maintain one or more localized websites that serve different geographic regions or languages? For example, does your company have a U.S. site that needs both an English and a Spanish version or a Canadian site that needs both an English and a French version? If so, are you responsible for creating translation assets? If you are a content contributor of a multilingual site where one or more locales have been enabled, you can translate assets into multiple languages (locales).

To determine whether there is more than one locale enabled on your site, open an asset for editing in Form View and then switch to the **Metadata** section of the form. If the **Metadata** section of the form contains a **Locale** drop-down field, then you can designate a locale for the asset and create translations of it. For more information about multilingual assets, see [Working with Multilingual Assets](#).

### 3.7 Will There Be Mobile Versions of the Website?

Does your company want you to create a website that is viewable on mobile devices such as iPhone, iPad, Samsung Galaxy, and Blackberry? Do you have access to the Contributor interface? Are you a content contributor? If so, you can use the Mobility feature to create mobile websites for various mobile devices.

Before you start using the Mobility feature, consider the following:

- Are you creating new content for the mobile website or are you reusing the content of an existing website?

Using Mobility, you can create, copy, edit, and preview content for a mobile website in the same manner as you create, copy, edit, and preview content for a default website for desktop/laptop computers. The only difference is, your content is shown in the context of mobile devices.

- How are mobile websites represented in the Contributor interface?



Your mobile website is represented by a site navigation node in the **Site Tree**. Each node is represented by a different icon which helps you differentiate a desktop/laptop site from assets for a mobile site that supports devices such as iPhone and Samsung Galaxy.

- Which mobile devices are associated with your mobile website?

Contact your administrator to find out which mobile devices are associated with your mobile website. This way, you preview how the content of your mobile website will look only on the screens of mobile devices relevant to your mobile website.

### 3.8 Who Publishes Your Content to the Website?

WebCenter Sites administrators set up the publishing destinations for your system and schedule publishing events from the Admin interface. In addition, users who hold the Publisher role can publish pages and assets directly from the Contributor interface, useful for smaller publishing jobs.

A publishing event runs as a batch process that the administrator schedules to occur at regularly-occurring intervals. Administrators can also override the schedule and publish on demand (which publish all approved assets in bulk). However, content contributors must first approve the content for publishing. Approving content for publishing makes it available in the next publishing cycle. In addition, administrators can grant publishing permissions to content contributors, which enables contributors to publish individual assets, on demand, directly from the Contributor interface.

### 3.9 Is Revision Tracking Enabled on Your Site?

What is revision tracking and is it enabled for any of the assets in your site? Revision tracking allows you to check out (lock) an asset, which prevents other users from editing or deleting it while you work with it. This feature is particularly helpful for larger projects where one user's work on an asset may overlap with another user's work.

When enabled, it allows only one user at a time to edit or delete an asset. In addition, it allows users to track and view past versions of an asset and the users who worked with that asset. It also enables users to restore (rollback) an asset to a previous version. In the Contributor interface, the Checkouts widget on your dashboard lists all the assets checked out by you. When you are finished working with an asset you have checked out, you must check it back in so other users can work on or approve it.

How do you know if revision tracking is enabled for an asset on your site?

- Have you tried to edit an asset you usually have access to, but you receive a message stating "Unable to edit asset because it is checked out to *user name*"?
- When you open an asset, do you see any icons related to revision tracking on the asset's toolbar? For example do you see the **Check Out** or **Check In** icons? (For more information about revision tracking icons, see [Table 12-2](#) in [Navigational Reference](#).)

If either of these scenarios are true, then revision tracking is enabled for that asset.

### 3.10 Are You Participating in a Workflow?

If an asset is part of a workflow process, it is routed through a series of editorial tasks (states). The flow of the editorial tasks that can be performed on the asset, and who is authorized to perform those tasks is determined by the workflow administrator

through roles. Your assigned roles determine the editorial tasks you can perform on an asset that is part of a workflow process.

In the Contributor interface, the Assignments widget on your dashboard provides a list of assets that are assigned to you through a workflow process. When your work on an asset in this list is complete, you must use the **Finish Assignment** function to start the next step in the workflow; the workflow process then moves the asset to the next state and assigns it to the appropriate users.

# Part II

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## Contributing Content

This part describes how to create and manage content in the Oracle WebCenter Sites web application's Oracle WebCenter Sites: Contributor interface.

This part includes the following chapters:

- [About Contributor](#)
- [Exploring the Contributor Interface](#)
- [Working with Assets](#)
- [Working with Mobile Device Content](#)
- [Approving and Publishing Content](#)



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## About Contributor

As a content contributor and marketer, you use the Oracle WebCenter Sites: Contributor interface to create, manage, and deliver website content.

For information about Contributor, see these topics:

- [Contributor Overview](#)
- [Exploring Content Management Concepts](#)
- [What Can You Do in the Contributor Interface?](#)
- [About the Contributor Window](#)

### 4.1 About the Contributor Window

The Oracle WebCenter Sites: Contributor interface provides a variety of content management features to accommodate a wide range of WebCenter Sites users, including content contributors and marketers. The Contributor interface is used by content contributors to create, approve, and publish content to the website. Marketers use the Contributor interface to create and manage marketing campaigns, and monitor and track visitor activity, which enables them to update the content and appearance of the website with your visitors' preferences in mind.

When the Contributor interface opens, you see the following:

- The left navigation pane, which contains the following trees:
  - **Site Tree:** Shows the site navigations for each website whose content is supplied by the content management site you are logged in to.
  - **Content Tree:** Shows the name of each Parent asset. Expand a parent asset to display a list of all the parent asset's child assets.
  - **My Work:** Provides the **Bookmarks**, **History**, and **My Tags** nodes which enable you to keep track of your workload. For more information, see [Finding and Organizing Assets](#).
  - **Marketing Tree:** Shows promotion, segmentation, and recommendation information. Also shows site visitor attributes and definitions.
- The dashboard, which displays the following widgets:
  - **Bookmarks:** Lists the assets you have bookmarked for easy retrieval at a future time. Bookmarked assets are also accessible from the **Bookmarks** node in the **My Work** tree.

For information about bookmarking assets, see [Bookmarking Assets](#).

- **Saved Searches:** Lists all the search criteria that has been saved as a “Saved Search.”  
For more information about saving searches, see [Saving Your Search Criteria to Your "Saved Searches" Widget](#).
- **Assignments:** Lists the assets that are currently assigned to you through a workflow process.  
For information about completing workflow assignment, see [Finishing Your Assignments](#).
- **Checkouts:** Lists all the assets that are currently checked out to you. This list is only available if revision tracking is enabled. For information about revision tracking, see [Revision Tracking](#).
- The menu bar, which contains the following options:
  - **Content:** Contains options to create new assets and manage existing assets.  
For information about creating and managing assets, see [Creating Assets](#).
  - **Edit:** Only available if you are working with an asset. This option provides content management tools to modify, copy, and delete an asset.  
For information about editing assets, see [Editing Assets](#).
  - **View:** Only available if you are currently working with an asset. This option provides tools to view an asset in either Form View or Web View and options for previewing an asset in different ways.  
For more information, see [Previewing Assets](#).
  - **Help:** Provides links to online help for the Contributor interface.
- The **Search** field, which you can use to enter a search query for a specific asset. You can also narrow your search down by asset type or use the Advanced Search function. For more information about searching, see [Finding and Organizing Assets](#).
- The applications bar, which you open and close by clicking the **Up/Down** arrow on the right of the menu bar.

Your access to Contributor interface functions is determined by the roles assigned to you by the WebCenter Sites administrator. For more information about the Contributor interface, see the following topics:

- [Contributor Overview](#)
- [Exploring Content Management Concepts](#)
- [What Can You Do in the Contributor Interface?](#)

## 4.2 Contributor Overview

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

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. Most publishing functions are available only in the Admin interface, such as scheduling publish events. However, if a content contributor is granted publishing permissions, assets can be published individually from the Contributor interface.

## 4.2.1 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, you approve the content for publishing and then the approved content is published to the website using RealTime publishing either automatically, based on a publishing schedule set up by your administrator, or manually, if needed.

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 4-1](#) and [Figure 4-2](#), and explained below:

Step 1, [Figure 4-1](#). 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 4-1](#). After you or another user approves the content and initiates the publishing process, the content is copied to the delivery system.

Step 3, [Figure 4-1](#). The content requested by a site visitor 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 4-2](#). 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 the content is cached) in viewer-ready form in the visitor's browser.

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**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.

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

- *Form View* displays a traditional form view that allows you to enter content into fields (shown on the left in [Figure 4-1](#)). You can then use the *Preview* option to see how the content would be displayed on the website if it were published.

- *Web View* allows you to enter information into the web page view of the content (shown on the right in [Figure 4-2](#)), 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 have 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 have 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 content (by performing a search or navigating the Content Tree), drag that content to the Drop Zone field, 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 you have to use it.



**Figure 4-1 Content Entry Form (Displayed in Form View and Web View)**

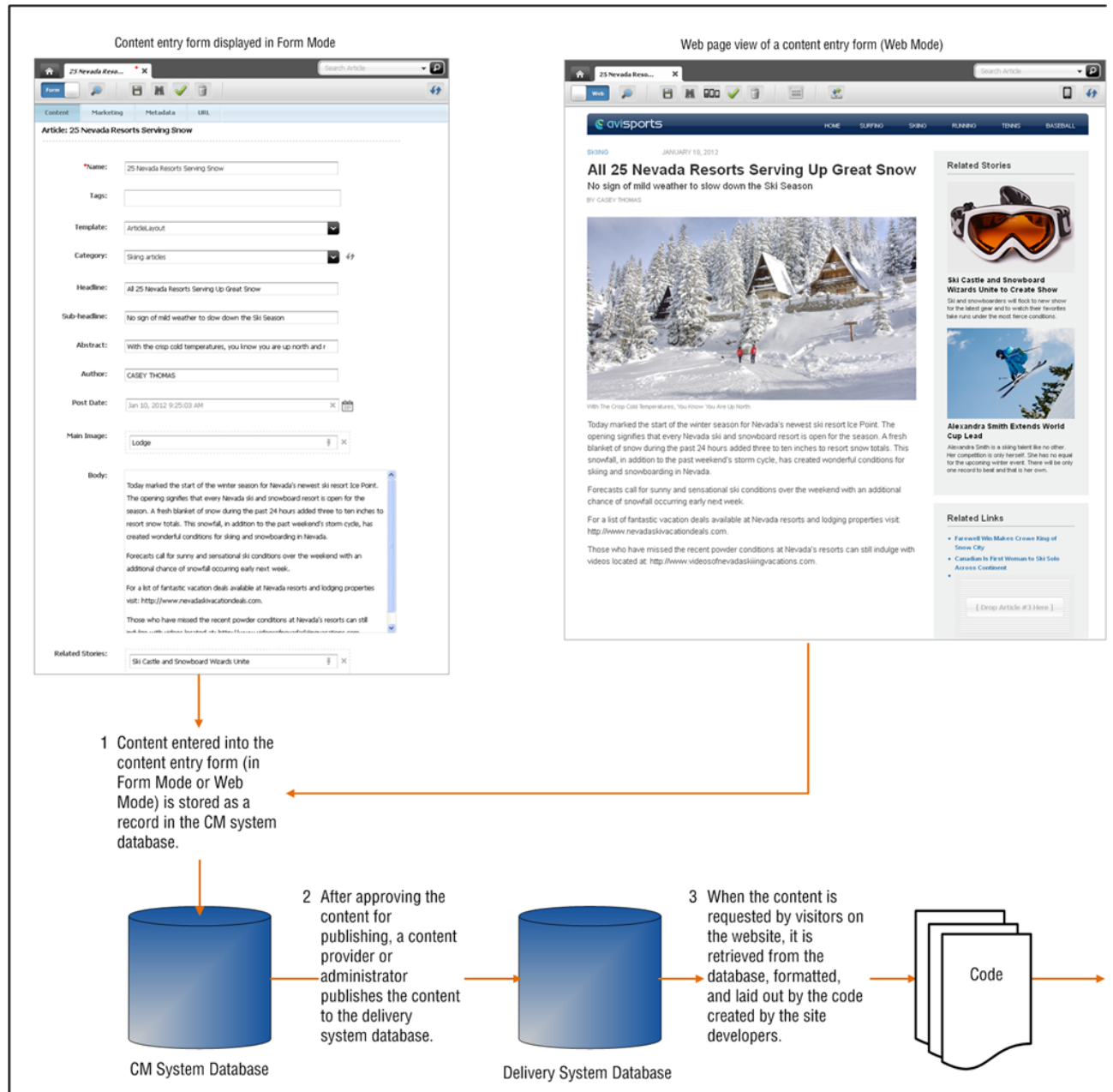
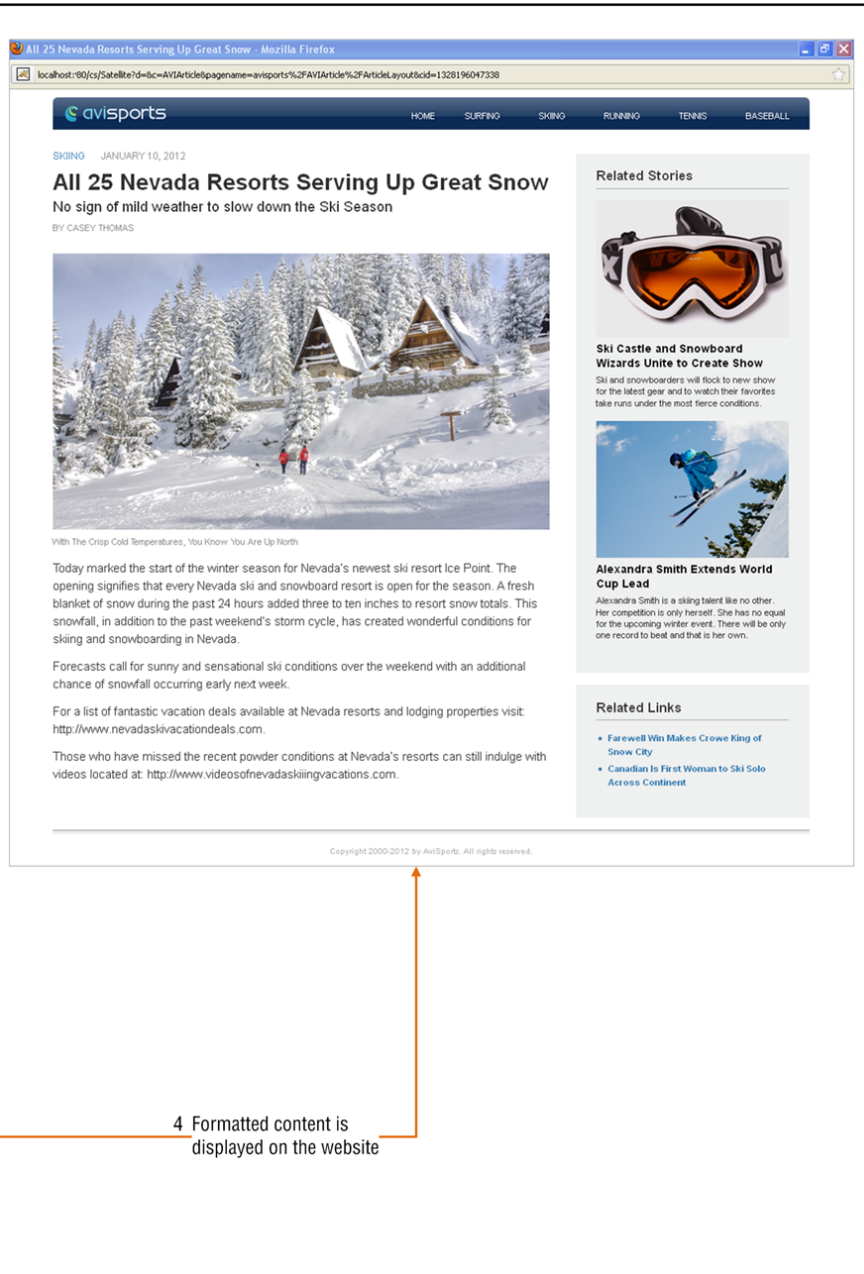


Figure 4-2 Website (Online Site)



## 4.2.2 Content Entry Modes

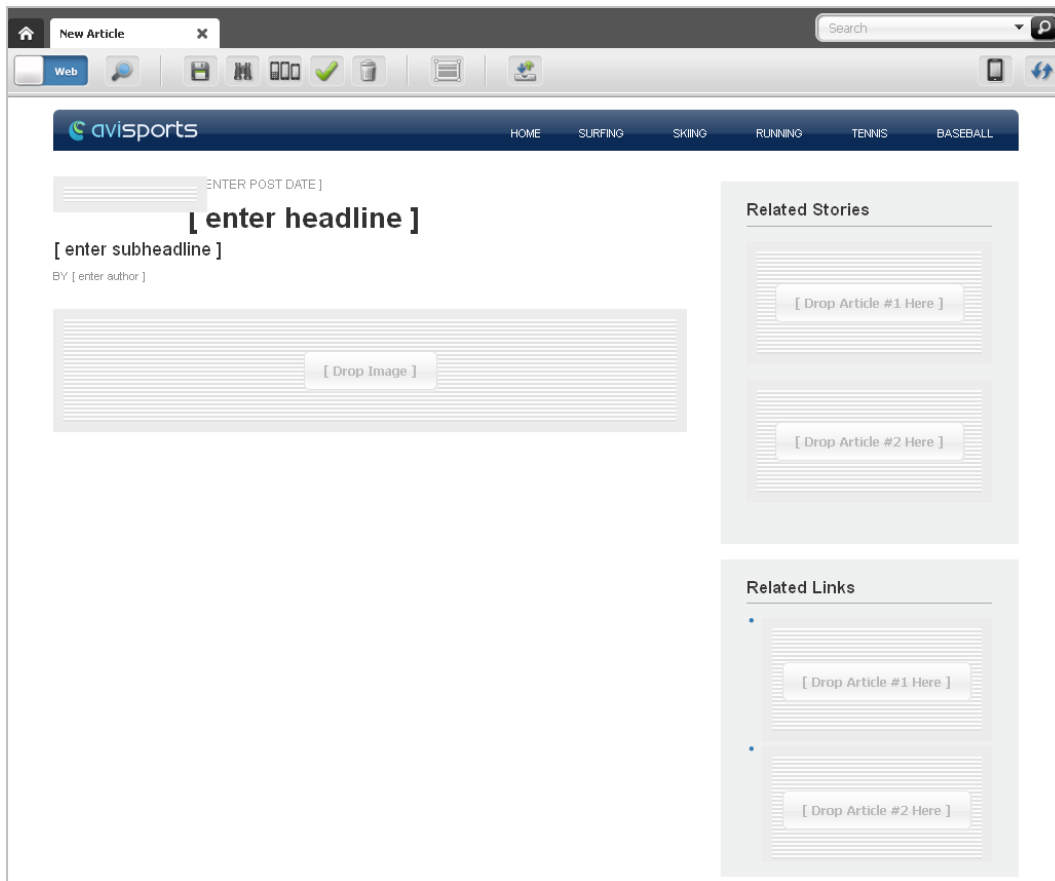
In the Contributor interface you can work with content entry forms using either *Form View* or *Web View*.

As examples, *Form View* is shown in [Figure 4-3](#), and *Web View* is shown in [Figure 4-4](#).

**Figure 4-3** Content Entry Form Displayed in Form View

The screenshot shows a web browser window titled "New Article" with a search bar in the top right. Below the browser window is a navigation bar with tabs for "Content", "Marketing", "Metadata", and "URL". The main content area is titled "Article: New Article" and contains the following form fields:

- Name:** A text input field containing "New Article".
- Template:** A dropdown menu showing "ArticleLayout".
- Headline:** An empty text input field.
- Sub-headline:** An empty text input field.
- Author:** An empty text input field.
- Post Date:** A date picker field with a calendar icon.
- Main Image:** A dashed box containing a hand icon and the text "Drop Zone".
- Body:** A large empty text area.
- Related Stories:** A dashed box containing a hand icon and the text "Drop Zone".
- Related Links:** A dashed box containing a hand icon and the text "Drop Zone".

**Figure 4-4** Content Entry Form Displayed in Web View

As you can see in [Figure 4-3](#), Form View 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 View (shown in [Figure 4-4](#)) allows you to work with the web page view of a content entry form. Instead of fields, Web View displays slots, predefined sample information, and other editable areas into which you can enter information. The information you enter in Web View is displayed exactly as it would be on the website (when the content is published).

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 View and Web View.

### 4.3 Exploring Content Management Concepts

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

### 4.3.1 Content: Asset Types and Assets

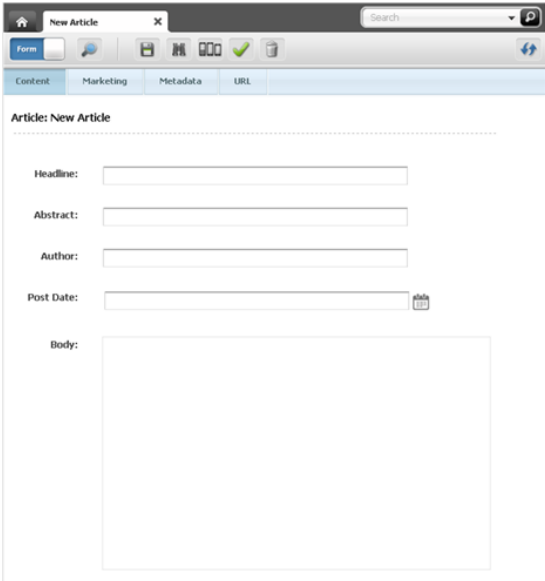
Assets are content items that you manage using WebCenter Sites, for example, articles, product descriptions, advertisements, photos, and video clips. Assets are instances of asset types.

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 must provide.

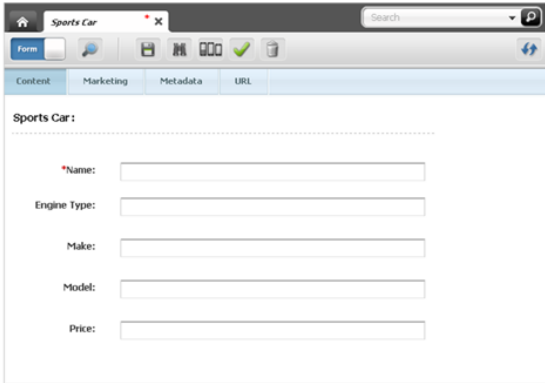
For example, the content entry form in [Figure 4-5\(A\)](#) belongs to an asset type named Article. Its fields **Headline**, **Abstract**, **Author**, **Post Date**, and **Body** prompt you for content that composes the article. The content entry form in [Figure 4-5\(B\)](#) belongs to an asset type 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 4-5 Content Entry Forms for the Article and Sports Car Asset Types**

(A) Article Asset Type




(B) Sports Car Asset Type



In our example, in [Figure 4-6](#), 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 4-6 Article Assets

The screenshot shows a web browser window titled "New Article". The browser's address bar contains "New Article" and a search box. Below the browser window is a toolbar with icons for "Form", search, save, print, zoom, checkmark, and trash. Below the toolbar are tabs for "Content", "Marketing", "Metadata", and "URL". The main content area is titled "Article: New Article" and contains the following fields:

- Headline:
- Abstract:
- Author:
- Post Date:  
- Body:

In the next example (Figure 4-7), 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 4-7 Sports Car Assets**

The screenshot shows a web browser window with the title 'Sports Car'. The browser's address bar contains a search field. Below the address bar is a toolbar with icons for 'Form', search, save, print, refresh, and delete. The main content area has a tabbed interface with 'Content', 'Marketing', 'Metadata', and 'URL' tabs. The 'Content' tab is selected, displaying a form titled 'Sports Car :'. The form contains five input fields: '\*Name:', 'Engine Type:', 'Make:', 'Model:', and 'Price:'.

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 4-5](#)). 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.

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**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.

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### 4.3.2 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.

A structured content asset requires you to enter prescribed pieces of content directly into a form in the Contributor 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 4-8](#)).

**Figure 4-8 Structured Content Asset**

The screenshot shows a web browser window titled "Structured Content Asset". The browser's address bar shows "New Content" and a search bar. Below the browser window, there are tabs for "Content", "Marketing", "Metadata", and "URL". The main content area is titled "Article:" and contains several form fields: "\*Name:", "Tags:", "Template:" (a dropdown menu with "-- choose display style --"), "\*Content Category:" (a dashed box labeled "Drop Zone"), "\*Headline:", "Subheadline:", "Byline:", and "\*Abstract:" (a large text area).

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 4-9](#)).



**Figure 4-9 Document Asset**

Document Asset

New Document Search

Form 📄

Content Marketing Metadata URL

Document:

\*Name:

Tags:

Template: -- choose display style -- ▼

Folder: 

✎  
Drop Zone

\*Document File:

Title:

Subject:

Author:

Keyword:  ✕

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

### 4.3.3 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 assets with their translations. 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 only one region 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.

#### 4.3.4 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 View 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 select a Template asset from the options provided to you by your developers to determine the appearance of that Page on the website. You can also access and modify an existing Page asset from the **Site Tree** or a list of search results.

#### 4.3.5 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 the Contributor interface 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 asset models used on your site.

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. The information for one instance of an asset is stored in one row of a database table. These assets are standalone. 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 product catalogs). The flex asset model is more complex than the basic asset model. The information for one instance of a flex asset is stored in multiple database tables. 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. 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.

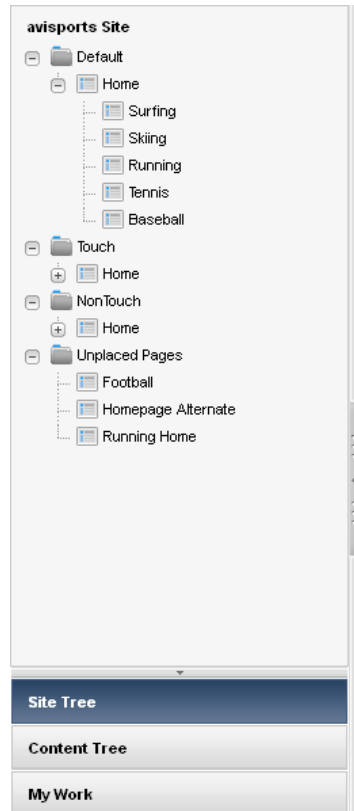
As a content contributor, you do not directly work with all of the members of the flex family. In fact, you mainly work with flex assets, which are the key members of flex families (all of the other members of a flex family contribute to the flex asset in some way). If you have the appropriate permissions, you can also create new flex attributes, which are characteristics of flex assets.

### 4.3.6 Site Design

In the Contributor interface, the site design for the CM site you are logged in to is represented as a hierarchy in the **Site Tree** on the navigation pane.

For example, [Figure 4-10](#) shows a section of the **Site Tree** for the avisports sample site. Notice the hierarchical structure in which content is organized:

**Figure 4-10 Site Tree for the avisports Sample Site**



The **Site Tree** contains a site navigation node for each website that uses the content of the CM site you are logged in to. For example, the **Site Tree** for the avisports sample site (shown in [Figure 4-10](#)) contains three site navigation nodes: **Default**, **Touch**, and **NonTouch**. Under each site navigation node is a list of Page assets displayed in a hierarchical order. A website's navigation is determined by the placement of the Page assets under the corresponding site navigation node. The **Unplaced Pages** node lists all of the Page assets that have not been placed under a site navigation. For more information, see [Defining Website Navigation](#).

## 4.4 What Can You Do in the Contributor Interface?

The Contributor interface provides the features you use to work with assets.

Whether you can access the assets and how you can work with them is determined by the following:

- The roles 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 – which is indicated by being grayed out, hidden from your interface, or producing 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 cannot work with it.

- If revision tracking is enabled and another user has checked out the asset you want to work with, you cannot 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 included in that publishing session, you cannot edit or delete that asset until the publishing session is complete.

The rest of this section provides information about the features and functions available to users in the Contributor interface.

## 4.4.1 Create and Edit Assets

Creating assets is permissions-based. If you have the right permissions, you can create brand new assets "from scratch."

If the asset 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 have to create the same asset for a different site, you can share the asset so that you do not have to create it multiple times.

In the Contributor interface, you can create and edit assets in the following ways:

- Create, copy, and edit assets in Form View
- Create, copy, and edit assets in Web View
- Add, replace, reposition assets on a Page
- Delete assets

### 4.4.1.1 About Form View

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

### 4.4.1.2 About Web View

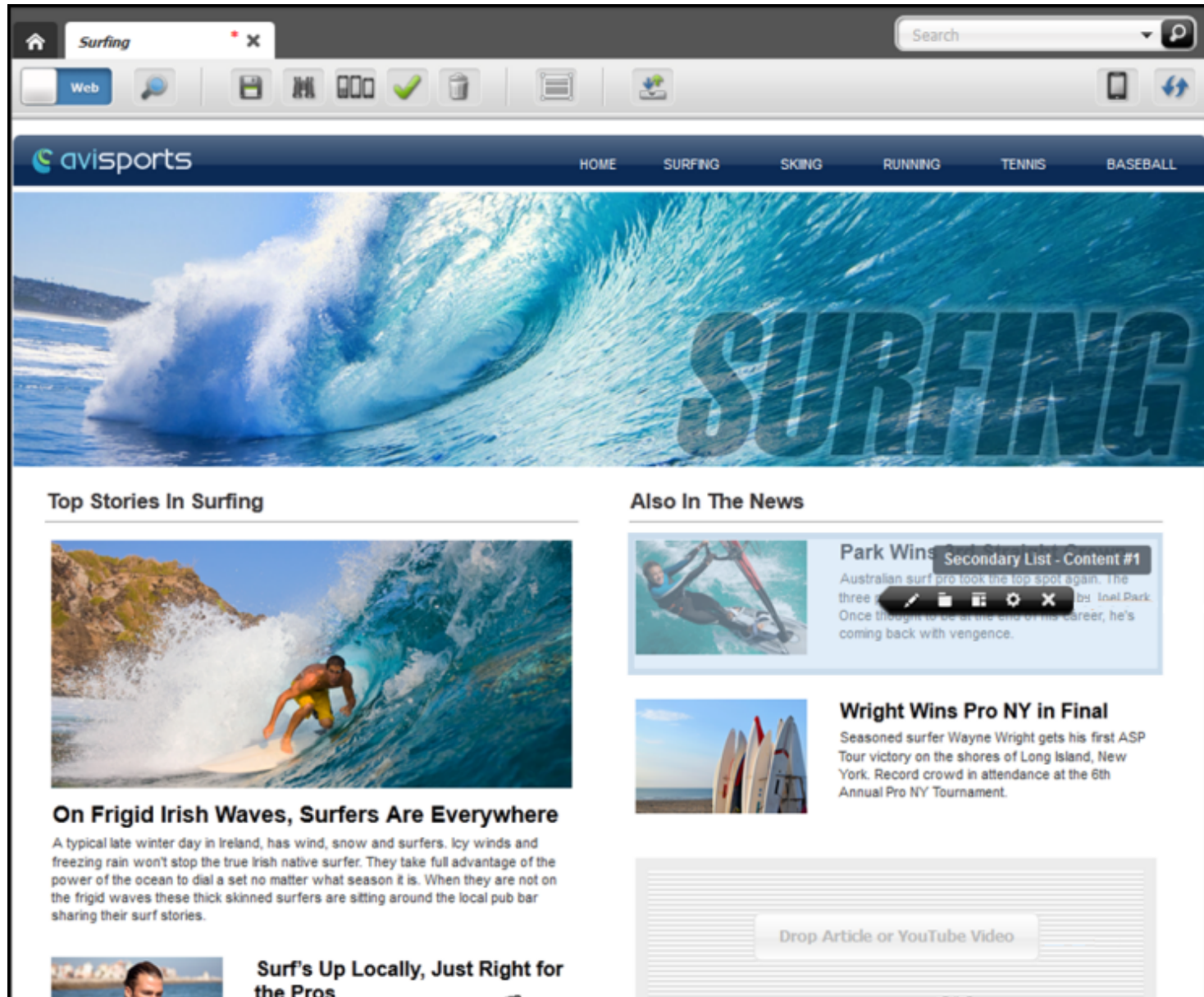
If an asset type is configured such that all assets of that type open in Web View, when you create or edit an asset of that type, the asset's web page view is shown to you. Web View offers in-context editing, which means you can work with assets directly in their published form (web page view). Instead 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 View. Editable areas can include simple text areas, WYSIWYG editor enabled text areas, and slots. [Figure 4-11](#) shows an example Edit view of the Surfing page asset rendered in Web View displaying empty and occupied slots.

#### 4.4.1.2.1 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 display slots that are empty, or occupied, or both (as shown in [Figure 4-11](#)). Each slot accepts one piece of content—an asset (unless the slot is multi-valued, in which case the slot accepts multiple assets). 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 slot. If the slot does not support drag and drop functionality, it usually contains 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 4-11 Empty and Occupied Slots (Surfing Page Asset)



By adding an asset to a slot, you create 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 a slot, a toolbar with content management options you can perform on the slot opens (as shown in Figure 4-11). 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 remove the asset from the slot. If you are working with a multi-valued slot, the toolbar provides a **Manage** option that allows you to reposition the order in which the assets

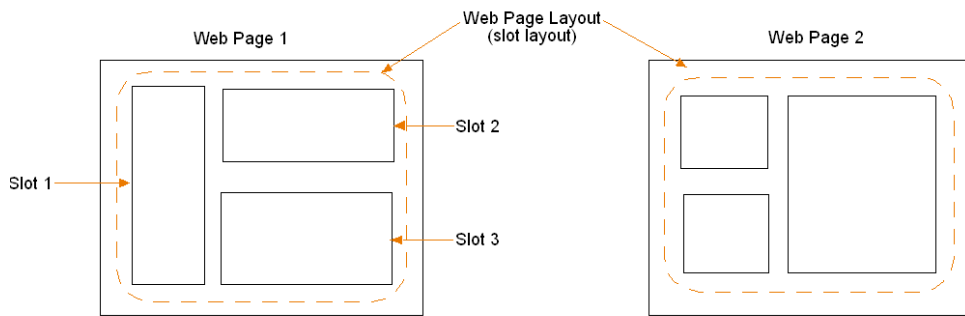
contained within that slot are displayed on the web page. The options available in a slot's toolbar are determined by the configurations your developers made to the web page layout (template) assigned to the asset with which you are working.

#### 4.4.1.2.2 What is the Difference Between Web Page Layout and Content Layout?

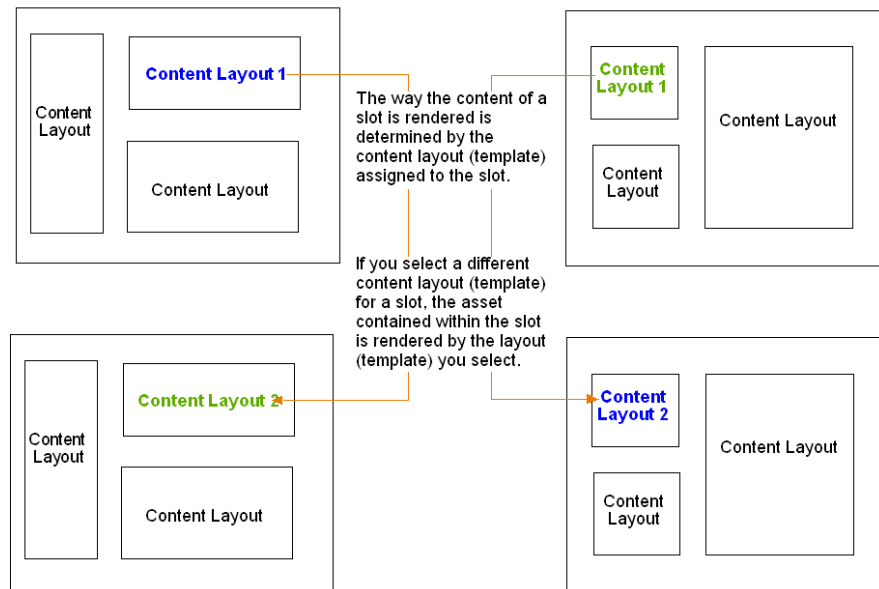
Web page layout is the layout (template) assigned to the asset with which you are working. When working with an asset in Web View, the web page layout assigned to the asset determines the arrangement of the slots in the asset's web page view (as shown in Figure 4-11). Content layout is the layout (template) 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 4-12 provides a diagram showing the difference between web page layout and content layout.

**Figure 4-12 Web Page Layout vs. Content Layout**



The web page layout (template) you select determines the position of the slots displayed on the asset's web page view. Selecting a different layout (template) renders slots in different positions, depending on how the web page layout (template) code is written.



#### 4.4.1.2.3 If You Use Web View, Will You Need to Switch to Form View?

When you are working with an asset in Web View, 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 View) are not necessarily the same fields that are available to you when working with the asset in Web View. Therefore, certain fields such as **Date** and **Locale** fields may not be available in Web View. In addition, certain attribute editors are only supported in Form View (for example, Clarkii Online Image Editor). In such cases, you have to switch to Form View to fill in those fields.

#### 4.4.2 WYSIWYG Editors

Your developers can enable WYSIWYG editors for fields in an asset's content entry form.

The following WYSIWYG editors can be enabled for fields in an asset's content entry form.

- CKEditor
- DatePicker
- Image Picker
- Clarkii Online Image Editor (OIE)

These WYSIWYG editors can be seen in both Form View and Web View. For more information, see [Working with Attribute Editors](#).

#### 4.4.3 Search for and Inspect System-Defined Asset Types

You can search for and inspect the following system-defined asset types in the Contributor interface, but you cannot edit them:

- Template
- CSElement
- SiteEntry
- DimensionSet
- Dimension
- Parent Definitions
- Attributes
- Flex Definitions

#### 4.4.4 Find Assets

The 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 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 you want to find 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 [Search Guidelines](#).

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 [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 [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.

#### 4.4.5 Organize Assets

Organize assets in the following ways:

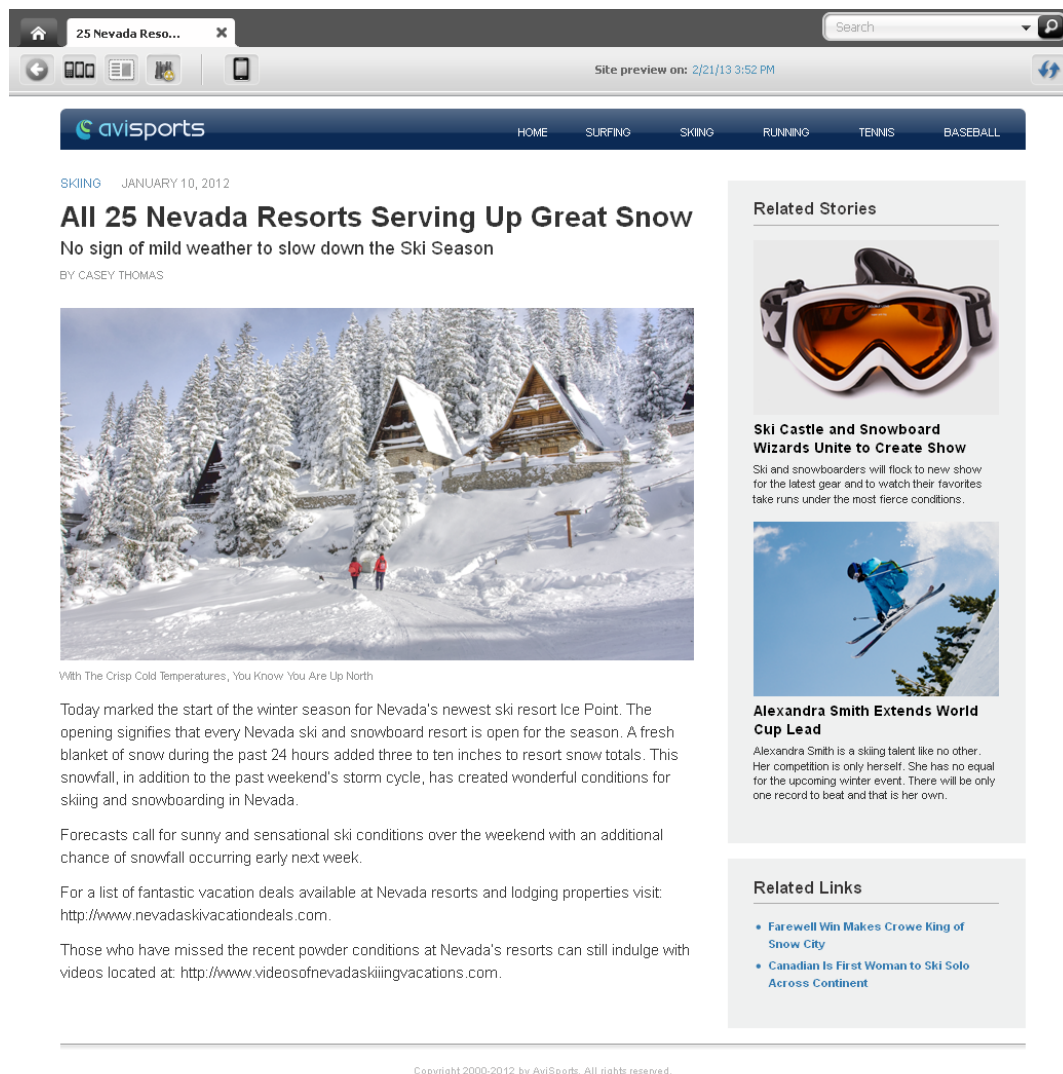
- Work with the **History** node in the **My Work** tree. The **History** node lists assets you have worked with in the current session.
- Share assets across sites
- Bookmark assets for future reference

#### 4.4.6 Preview Content

The *Preview* function enables you to view how the content you create or edit would look if it were published to the website.

A preview of a page is shown in [Figure 4-13](#). Unlike working with content in Web View, when you preview a piece of content you are not able to edit it.

Figure 4-13 Previewing Content



While you are planning upcoming changes to a website, you can assign start and end dates to an asset. When 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 an asset 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. When you assign a start 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 you are previewing it.

To edit the content, you must work with it in either *Form View* or *Web View*. For more information about previewing assets, see [Previewing Assets](#).

#### 4.4.7 Link 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 through an image asset
- Create a link to a URL
- Embed links to other assets
- Embed contents of other assets by reference
- Embed links to external websites

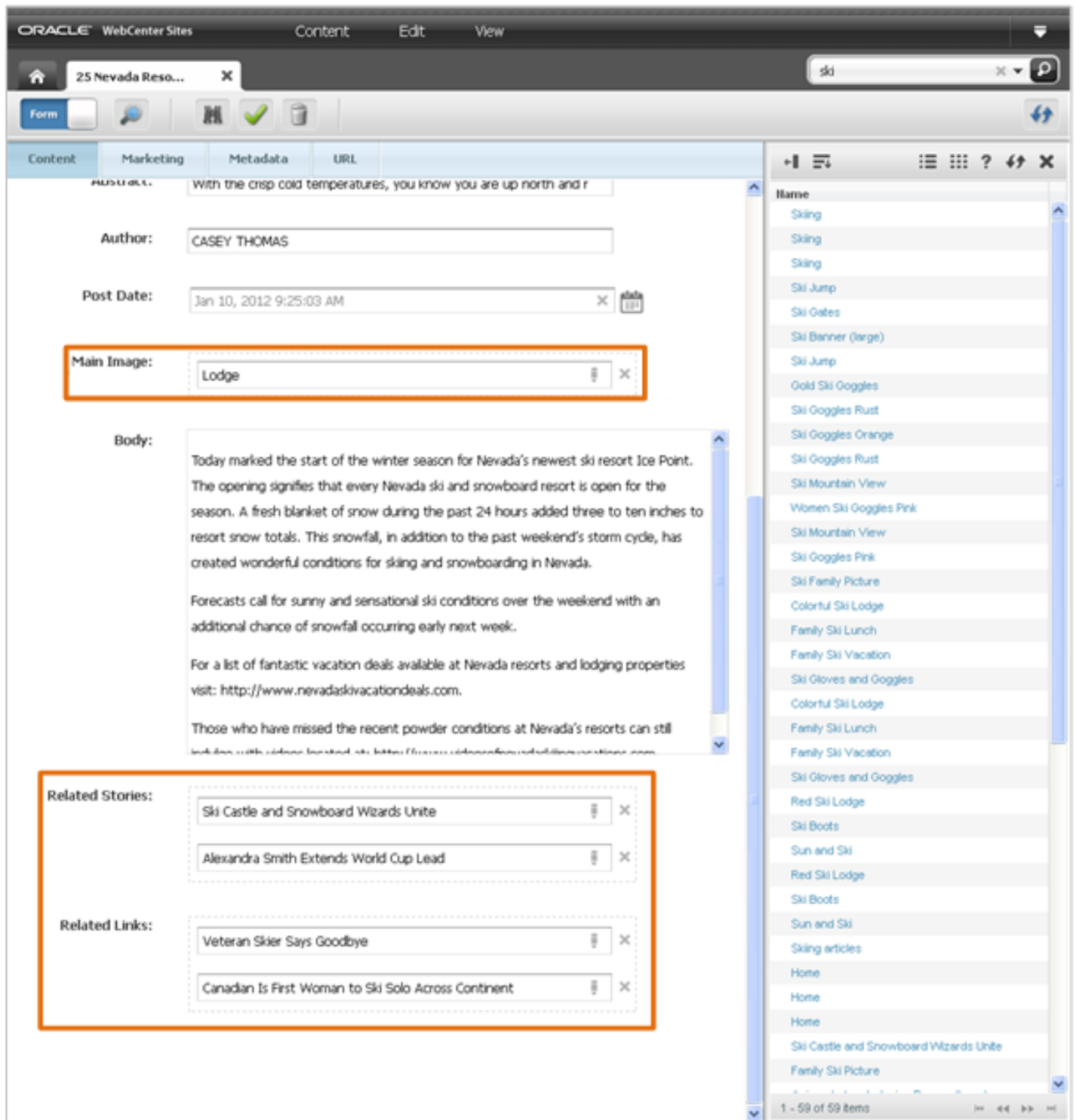
For instructions on linking assets using CKEditor, see [Linking Assets and URLs](#).

#### **4.4.8 Asset Associations**

Some asset Create and Edit views include fields (Form View) or slots (Web View) where you link another asset to the one in which you are working.

These types of fields are called "associations." [Figure 4-14](#) shows an Article asset (from the avisports sample site), displayed in Form View and Web View, which is associated with four other Article assets.

Figure 4-14 Association Field Displayed in Form View and Web View



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 are 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.

#### 4.4.8.1 Single-Valued and Multi-Valued Associations

An association field allows you to do one of the following, depending on the configurations of your developers:

- **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.
- **Multi-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 or sub-type of asset, or it may be unrestricted, accepting different types of assets.

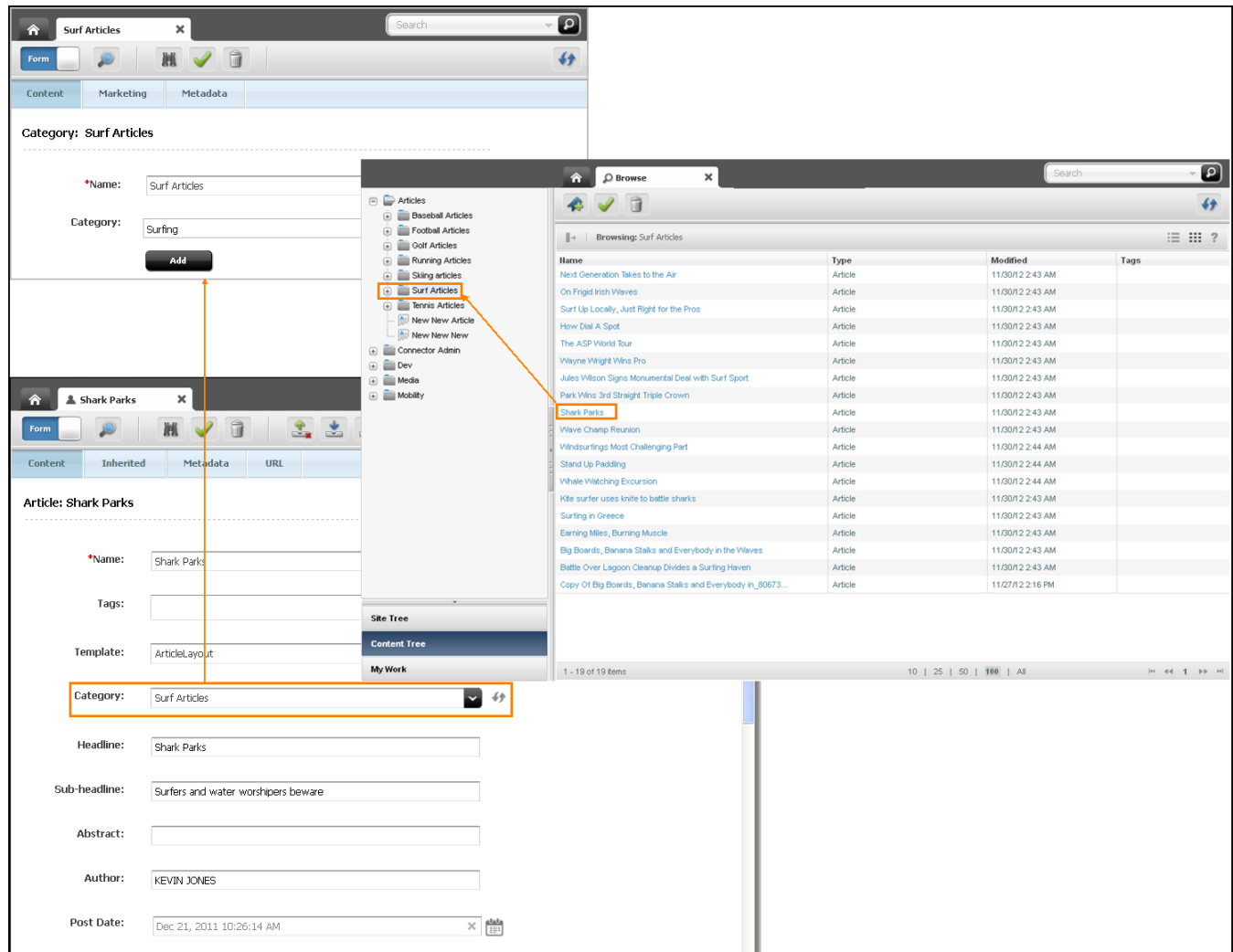
#### 4.4.8.2 Parent-Child Associations

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.

When a child asset is linked to a parent asset, it inherits the parent's attributes and values while retaining its own attributes. 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. Inherited attributes are shown on a separate tab. All the attributes that are available in the parent and are inherited are displayed on the Inherited tab. If there is more than one parent, the Inherited tab shows the attributes grouped by parent. The Inherited tab shows all supported data types.

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. For more information about approval for publishing, see [Performing Approval Tasks](#).

**Figure 4-15 Parent-Child Relationships**



When an asset is assigned multiple parents, the asset is shown under multiple nodes in the **Content Tree**, as a child of each of its associated parent assets.

#### 4.4.9 Create Multilingual Assets

Very often, organizations maintain one or more localized websites that serve different geographic regions. Such sites 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. When 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 have to delete all of the translations linked to the master asset before you can delete it.

### 4.4.10 Create Website Navigation

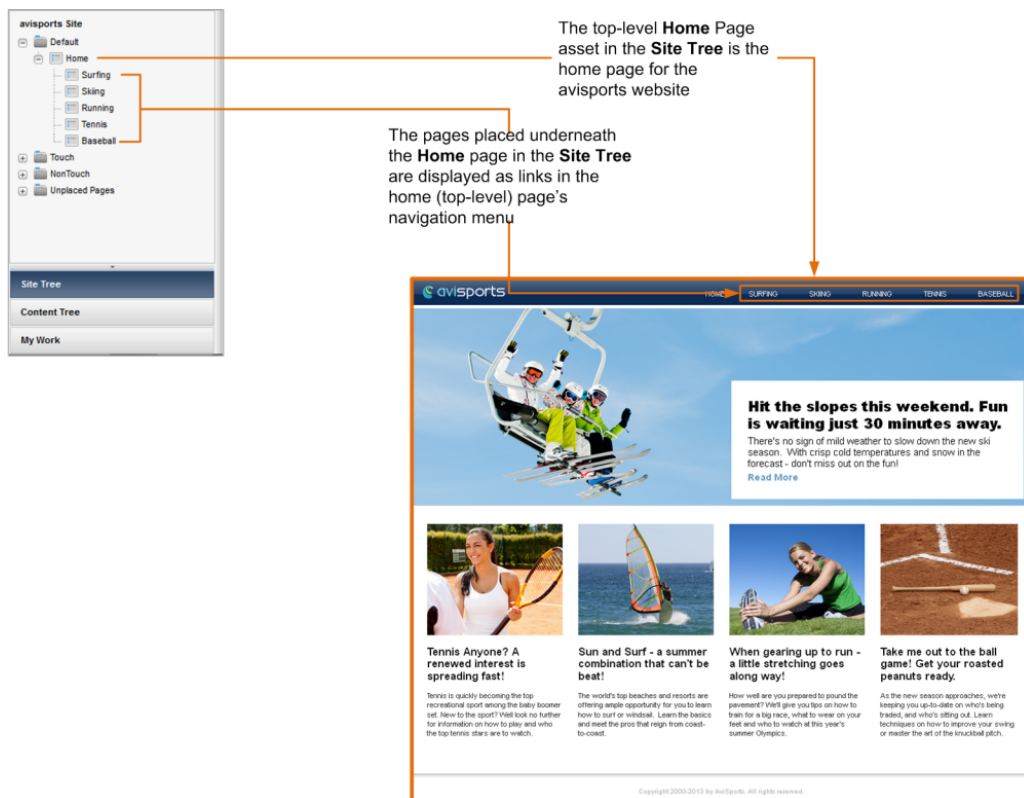
A website's navigation allows visitors to access the different sections (pages, articles, and so on) of the site and is determined by the placement of the Page assets under a site plan in the **Site Tree** (shown in [Figure 4-16](#)). A site plan reflects the website's navigation and enables you to create a hierarchy for the pages of your site. Therefore, the structure of your site's navigation can start off general and drill down to specific.

**Note:**

Since, the content of a single CM site can be used by multiple websites, each site plan in the **Site Tree** represent a website using the content of that one CM site.

For example, when you place a Page under 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 4-16](#) shows the dynamic relationship between the placement of Pages under a site plan in the **Site Tree** and your website's navigation.

**Figure 4-16 Relationship Between the Site Tree and Your Site's Navigation**



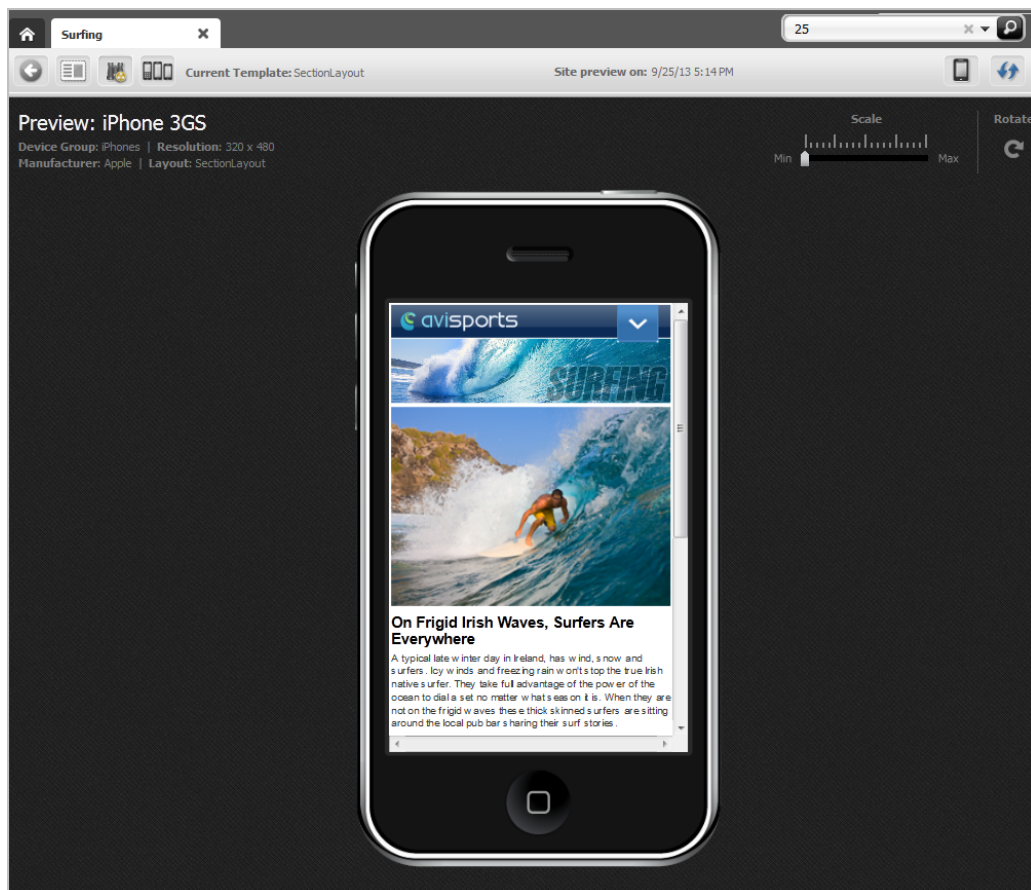
## 4.4.11 Mobile Websites

The Mobility component 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 published.

For example, [Figure 4-17](#) shows the preview of the Surfing Page asset for the avisports sample site displayed on the screen of the iPhone 3GS mobile device (represented by a Device asset) as it would look on the screen of an actual iPhone 3GS if the Page was published.

**Figure 4-17 Surfing Page Asset Preview Displayed on the Screen of a Mobile Device**



## 4.4.12 Approval and Publishing

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.



You can participate in the publishing process in the following ways:

- Approve assets for publishing
- Remove assets from the publishing queue
- Publish an approved asset directly from the Contributor interface

For more information, see [About the Approval Process](#) and [About the Publishing Feature in the Contributor Interface](#).

### 4.4.13 Use Revision Tracking

Revision tracking allows you to check out 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, and retrieved by queries or collections.

If revision tracking is enabled for the asset types on the site you are assigned, you can work with revision tracking in the following ways:

- Track revisions to assets
- Check assets in and out
- Roll assets back to a previous version

For more information, see [About Revision Tracking](#).

### 4.4.14 Workflow

Assets can 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. If an asset is assigned to a workflow process, users can participate in the workflow process as follows:

- Pass assets through workflow
- Work with workflow groups
- Work with workflow reports

For more information, see [About Workflow](#).



---

## Exploring the Contributor Interface

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

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

- [About This Quick Tour](#)
- [Prerequisites for the Quick Tour](#)
- [Quick Tour of Using the Contributor Interface](#)
- [Switch to a Different Site](#)

### 5.1 About This Quick Tour

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

---

**Note:**

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

---

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

### 5.2 Prerequisites for the Quick Tour

To follow along with the procedures in this quick tour, the avisports and FirstSite II sample sites must be installed with your WebCenter Sites system. If no sample sites are installed, contact your WebCenter Sites administrator. For information about the sample sites, see [What Sample Sites Are Used In This Guide?](#)

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

### 5.3 Quick Tour of Using the Contributor Interface

Use the quick tour to orient yourself in the Contributor interface.

The quick tour of the Contributor interface comprises these topics:

- [Familiarize Yourself with the Contributor Interface](#)
- [Organize Your Dashboard](#)
- [Explore the Trees in the Navigation Pane](#)
- [Create an Asset](#)
- [Switch Between Web View and Form View](#)
- [Preview the Asset](#)
- [Find and Open an Asset](#)
- [Edit the Asset in Web View](#)
- [Edit the Asset in Form View](#)
- [Work With the Asset In the Context of a Mobile Device](#)
- [Create a Page Asset And Associate Your QuickTour Asset With It](#)
- [Include the Page in a Site Navigation](#)
- [Approve and Publish the Page](#)

### 5.3.1 Familiarize Yourself with the Contributor Interface

1. Log in to WebCenter Sites as the demo user (password: demo), select the avisports sample site, and then select the **Contributor** interface. For detailed instructions, see [Logging in to Oracle WebCenter Sites](#).

WebCenter Sites opens the Contributor interface for the avisports sample site (shown in [Figure 5-1](#)).

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

Figure 5-1 The Contributor Interface for the Avisports Sample Site

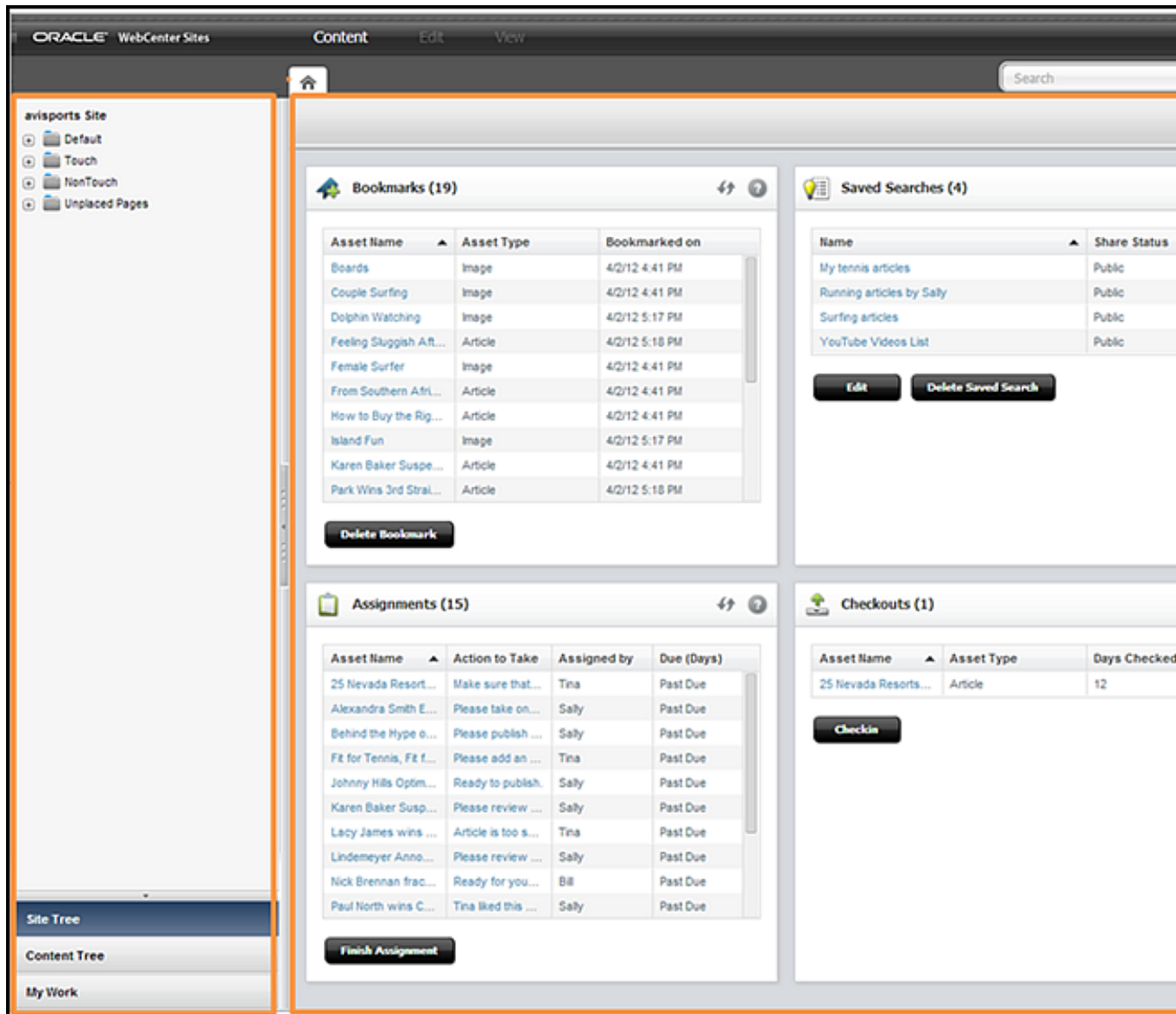


Figure 5-1 shows an overview of the Contributor interface and its key features, such as the navigation pane, menu bar, **Search** field, and dashboard. The following is a list of features available in the Contributor interface:

- The menu bar contains the **Content**, **Edit**, and **View** options, and the **down-arrow** icon.
  - The **Content** option enables you to create, save, approve for publishing, bookmark, share with different sites, and change the permissions of assets.
  - The **Edit** option enables you to inspect, modify, copy, and delete assets, work with revision tracking, and change the layout (template) assigned to an asset.
  - The **View** option enables you to preview assets, view an asset's status summary, and toggle between Form View and Web View.

- The **down-arrow** icon is used to open the applications bar. From the applications bar you can switch to another site or application, edit your user profile, and log out of WebCenter Sites.
- The main area of the Contributor interface is where your dashboard (workspace) is located.

The **Home** tab is permanently displayed in the workspace and contains your dashboard. 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. Each asset opens in its own tab (over the **Home** tab).

- The navigation pane is located to the left of the dashboard (workspace) and allows you to access assets from the **Site Tree**, **Content Tree**, and **My Work** tree. For more information about the trees in the navigation pane, see [Explore the Trees in the Navigation Pane](#).
- The **Search** field allows you to enter your search criteria into it. When you click the **magnifying glass** button, your search results are displayed either in a **Search** tab or docked to the right of your workspace. From the **Search** field you can narrow down your search by selecting specific asset types to search for or by running an Advanced Search.

### 5.3.2 Organize Your Dashboard

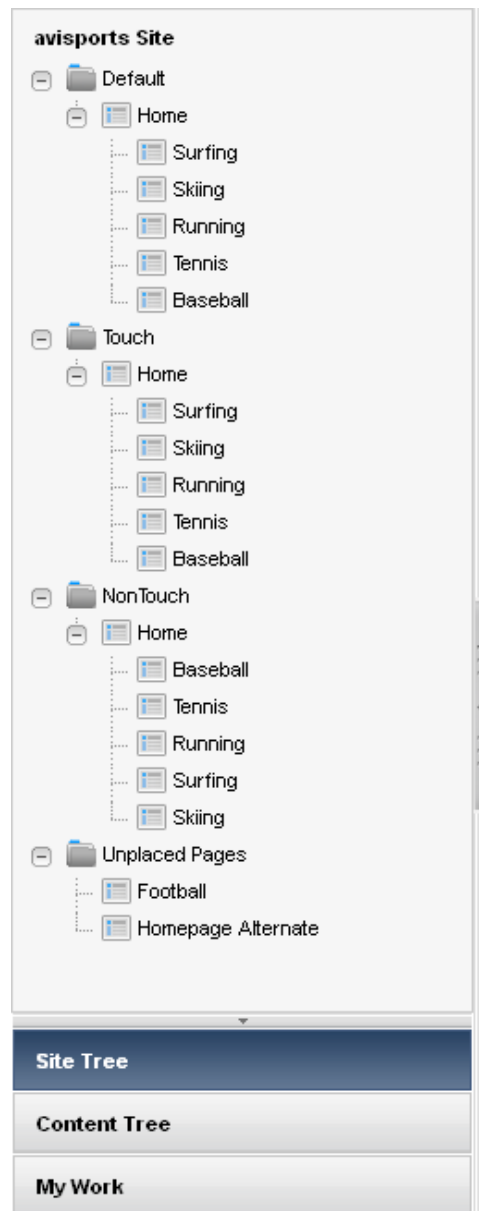
Your dashboard contains the **Bookmarks**, **Saved Searches**, **Assignments**, and **Checkouts** widgets. In addition, your developers may have created custom widgets for your dashboard.

Organize the widgets on your dashboard by clicking a widget's title bar and then dragging it to and dropping it into a different position on the dashboard.

### 5.3.3 Explore the Trees in the Navigation Pane

The navigation pane enables you to access assets from the **Site Tree**, **Content Tree**, and **My Work** tree. Follow the instructions in this section to familiarize yourself with the different trees in the navigation pane.

1. In the navigation pane (shown in [Figure 5-2](#)), click through the following bars:

**Figure 5-2 Navigation Pane: Site Tree**

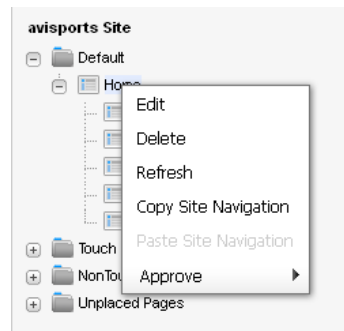
- **Site Tree:** Enables you to browse the pages of your website. These pages can either be placed in a hierarchy under a site navigation or "unplaced" (meaning the pages are not part of any site navigation). A site navigation represents the navigation (organization) of a website. Multiple site navigations can exist within a single CM site, and each site navigation is displayed in the CM site's **Site Tree**.
- **Content Tree:** Enables you to visually browse the flex asset hierarchies present in your site.
- **My Work:** Contains the **Bookmarks**, **History**, and **My Tags** nodes.

The navigation pane displays the tree you selected. For detailed information about the trees, see [Navigation Pane](#).

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.

3. **Drill down the hierarchy.** Click the plus sign next to a node to expand it and display its associated assets. If you are working with the **Content Tree**, double-click a parent asset to open a **Browse** tab containing a list of child assets.
4. **Right-click an asset.** WebCenter Sites opens a context menu with content management functions you can perform on the asset. [Figure 5-3](#) shows the context menu for the Home Page asset in the **Site Tree**.

**Figure 5-3 Context Menu for a Page Asset in the Site Tree**



Assets in the **Content Tree**, and **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.

### 5.3.4 Create an Asset

The Contributor interface allows you to create assets in Form View, Web View, and (if the Mobility feature is enabled) within the context of a mobile device:

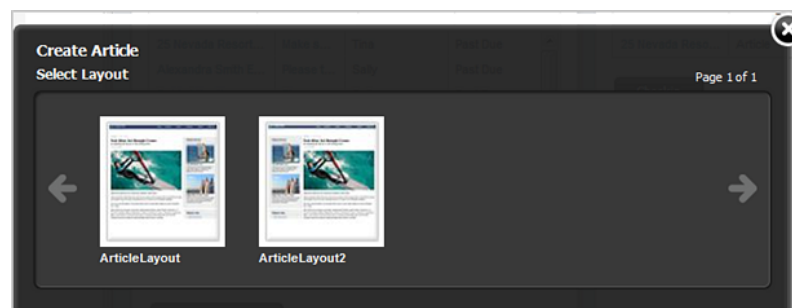
- In Web View, you enter information into the web page view of the asset, which shows you how the asset will be displayed on the website as you are creating it.
- In Form View, the asset is represented by a content entry form containing predefined fields into which you can enter information for the asset.
- If the Mobility feature is enabled, you can create the asset in the context of mobile devices, which is the same as editing an asset in Web View, however, your asset is shown on a Device asset representing a mobile device.

For the purposes of this quick tour, create an asset of type Article. In the avisports sample site, the Article asset type is configured to open in Web View.

1. In the menu bar, select **Content, New**, and then select **Article**.

The Create Article dialog opens, as shown in [Figure 5-4](#).

**Figure 5-4 Create Article Dialog**

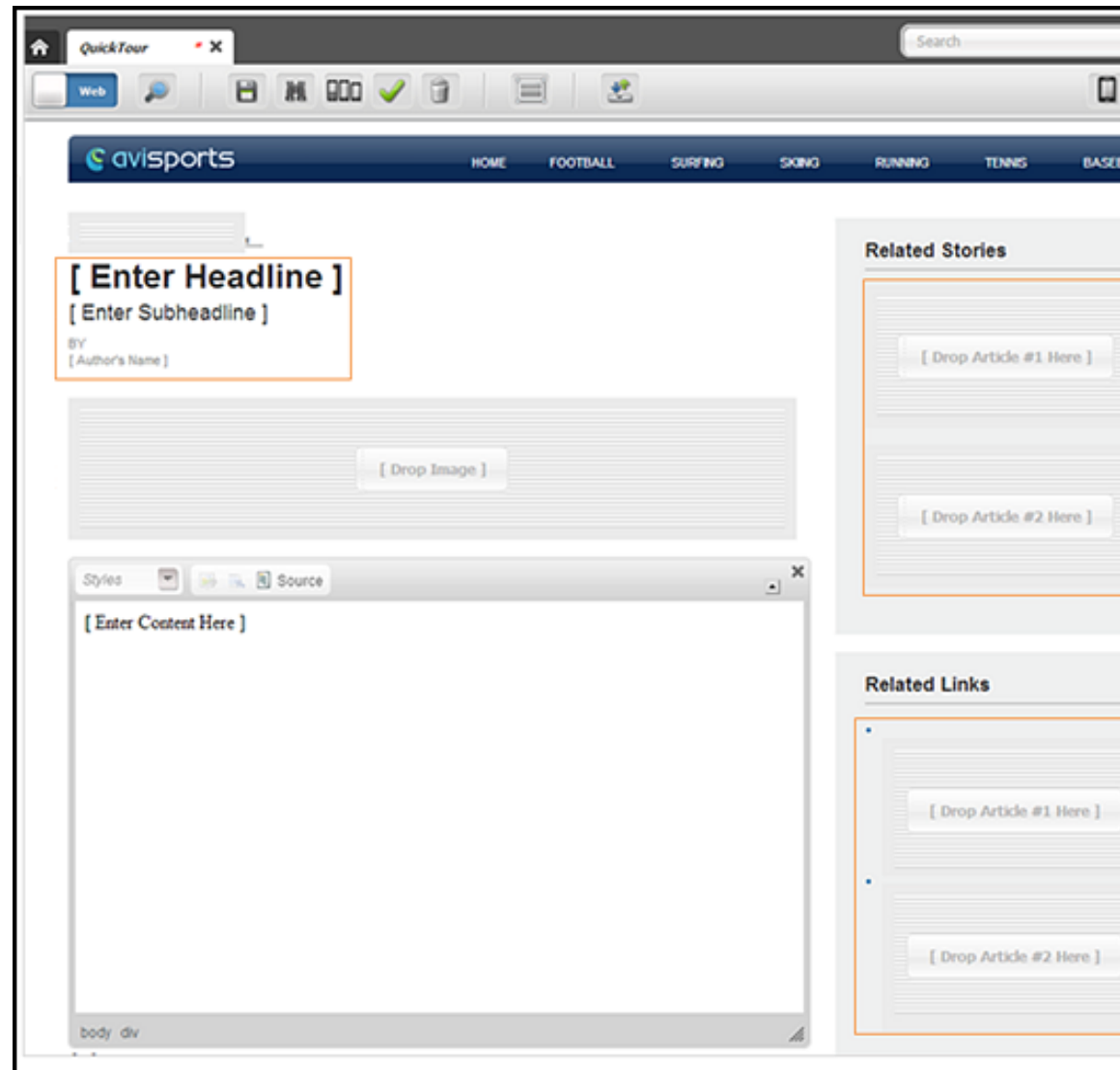




2. In the Create Article dialog; in the **Select Layout** field, select **ArticleLayout**; in the **Enter Name** field, enter **QuickTour**; click **Continue**.

A tab opens displaying the asset's content entry form in Web View (as shown in [Figure 5-5](#)).

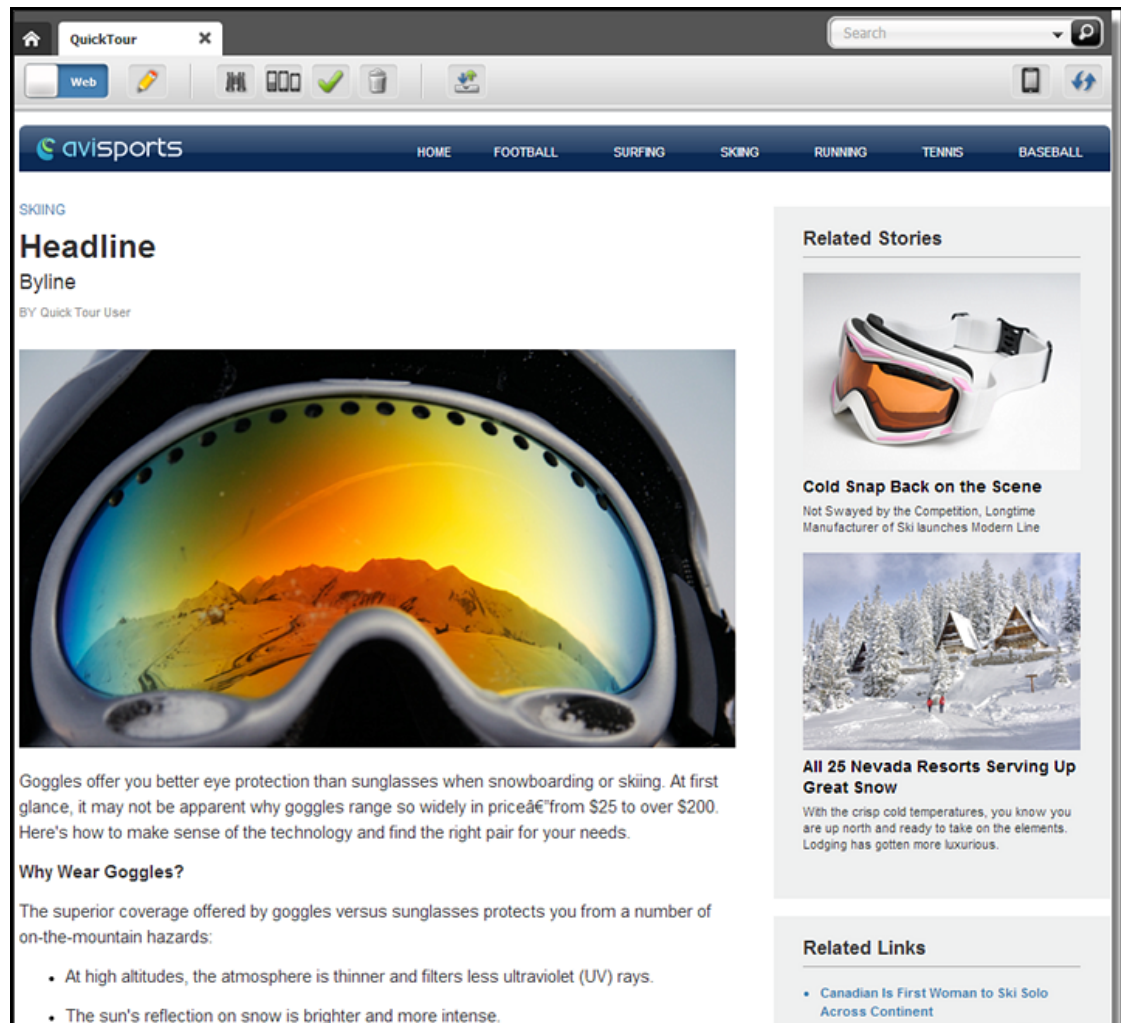
**Figure 5-5** Asset Displayed in Web View



3. Click a slot to open the slot's toolbar, then select the **Slot Properties** option to determine the type of asset the slot supports.
4. Open the **Content Tree**, expand the **Media** node, and then expand the **Skiing images** node. Now, drag-and drop the Rainbow Goggles Image asset into the slot that supports the Image asset type.
5. Now associate some Article assets with your QuickTour asset: in the **Content Tree**, expand the **Articles** node, and then expand the **Skiing articles** node; in the **Skiing articles** node, drag and drop some Article assets into the slots in the **Related Stories** and **Related Links** sections of the asset.

6. Categorize your asset by associating it with the **Skiing articles** category. In the **Content Tree**, navigate to the **Skiing articles** node and then drag and drop it into the slot that accepts assets of type Article Category.
7. Click a text area to enter some content. When you click the text area, you will either see a simple text field or a WYSIWYG-enabled field.
8. In the asset's toolbar, click **Save** to save your changes to the asset.
9. Click **Inspect** to open the Inspect view of the asset. Your QuickTour asset will look similar to the one shown in [Figure 5-6](#).

**Figure 5-6** *Inspect View of the New QuickTour Asset*



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

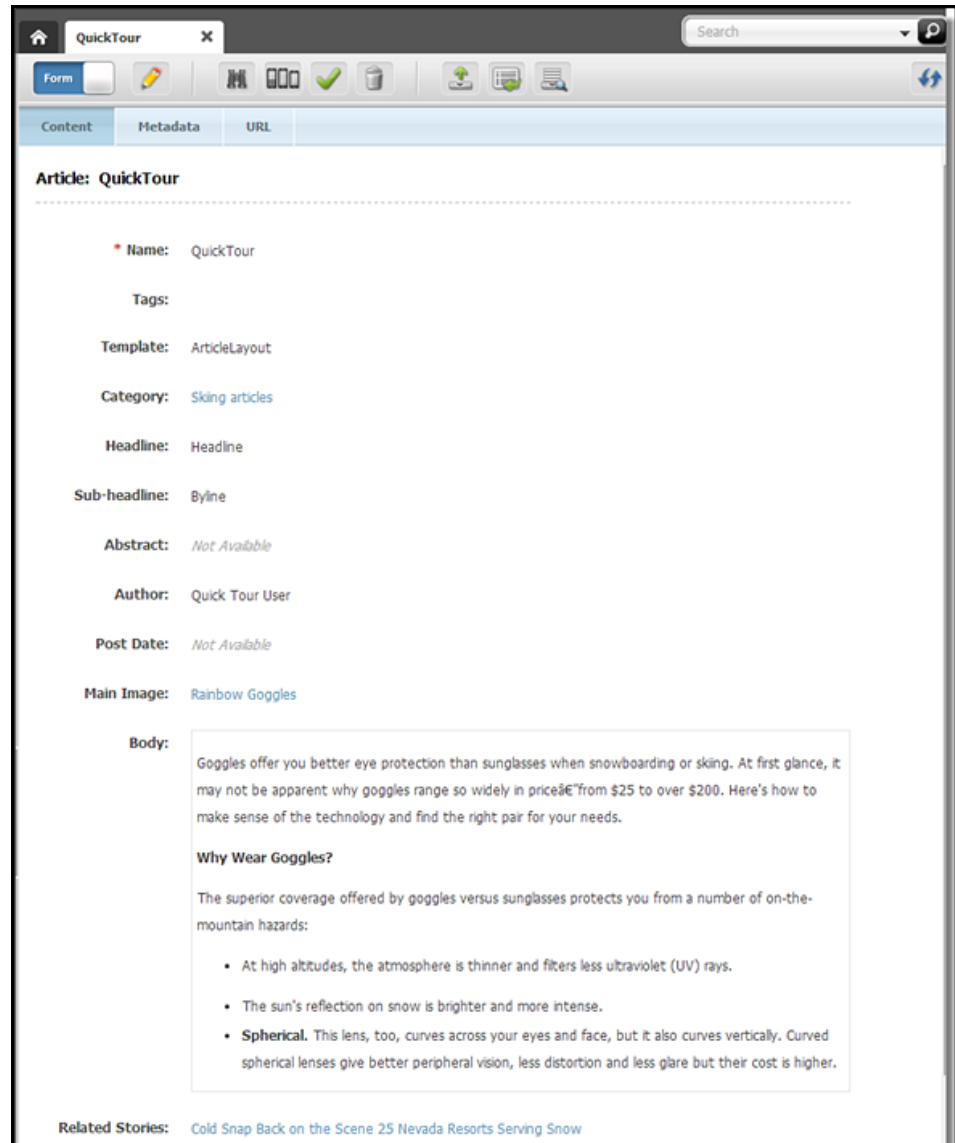
### 5.3.5 Switch Between Web View and Form View

Now that you are familiar with creating assets in Web View, switch to Form View to view the fields in the asset's content entry form.

1. Click the **Mode** switch in the asset's toolbar (shown in [Figure 5-7](#)).

**Figure 5-7 Mode Switch**

The tab redisplay the asset in Form View (as shown in [Figure 5-8](#)).

**Figure 5-8 Asset Displayed in Form View**

2. Click the **Mode** switch again to redisplay the asset in Web View.

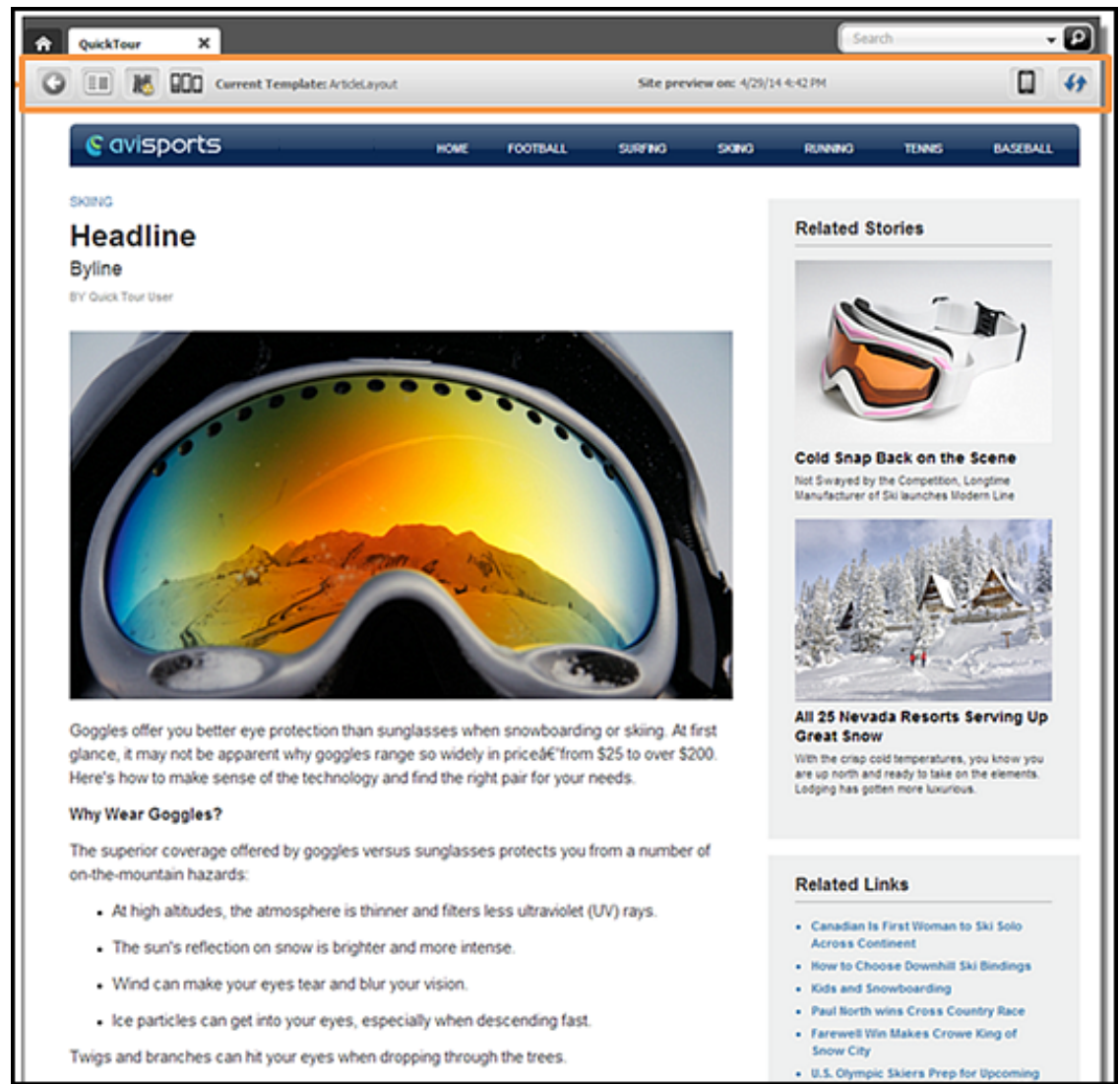
### 5.3.6 Preview the Asset

Now, preview the asset to see how it will look on the website when it's published.

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

The tab displays the preview of the asset, as shown in [Figure 5-9](#).

Figure 5-9 QuickTour Asset Preview



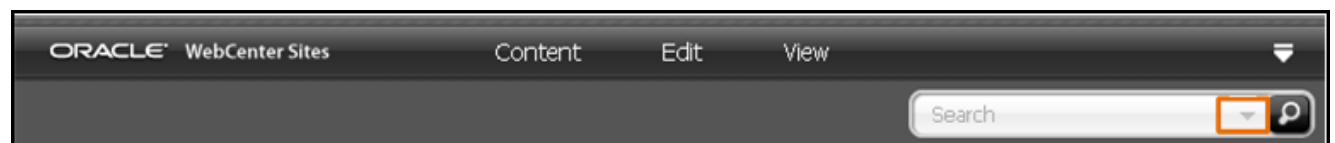
2. In the toolbar, click the **Go Back** button to return to the asset's Inspect view.

### 5.3.7 Find and Open an Asset

Now that you have created an asset, find it by performing a search in the Contributor interface.

1. In the **Search** field, (shown in Figure 5-10), enter your search criteria. For example, since your asset contains the word "Quick," enter **quick** into the field.

Figure 5-10 Search Field



2. Click the **down-arrow** in the **Search** field and select **Article** from the Search Type menu to narrow down your search results to the Article asset type.

**Note:**

If you do not narrow down your search to a specific asset type, WebCenter Sites searches for any asset containing the word you specified in the **Search** field.

3. Click the **magnifying glass** button in the **Search** field.

A **Search** tab opens in the workspace displaying a list of assets matching your search criteria (as shown in [Figure 5-11](#)).

**Figure 5-11 Search Tab**

Name	Type	Modified	Tags
Johnny Hills Optimistic For a Quick Return	Article	4/27/12 6:23 PM	
How to Run Hills Properly	Article	4/4/13 4:00 PM	
The Volley Stroke	Article	4/27/12 7:33 PM	
What Should I Wear When Running	Article	4/4/13 3:55 PM	
The Return of Serve	Article	4/2/13 11:54 AM	
Mastering The Forehand	Article	4/27/12 7:26 PM	
How to Dress in Layers	Article	4/27/12 6:59 PM	
Surfing in Greece	Article	4/27/12 7:17 PM	
Diet and Nutrition for Runners	Article	4/27/12 6:35 PM	
Grip Waxing Your Cross-Country Skis	Article	4/27/12 6:56 PM	
Mastering the Baseball Swing	Article	4/27/12 6:12 PM	
QuickTour	Article	4/30/14 10:41 AM	
Ski Out of an Avalanche	Article	4/19/12 2:07 PM	
Male Guide To Running Faster	Article	4/4/13 4:49 PM	men running

The search results list shows a brief summary of information about each item in the list, such as name, asset type, and modification date. For information about working with the search results list, see [Working with the Search Results List](#).

4. In the search results list, select the QuickTour asset.

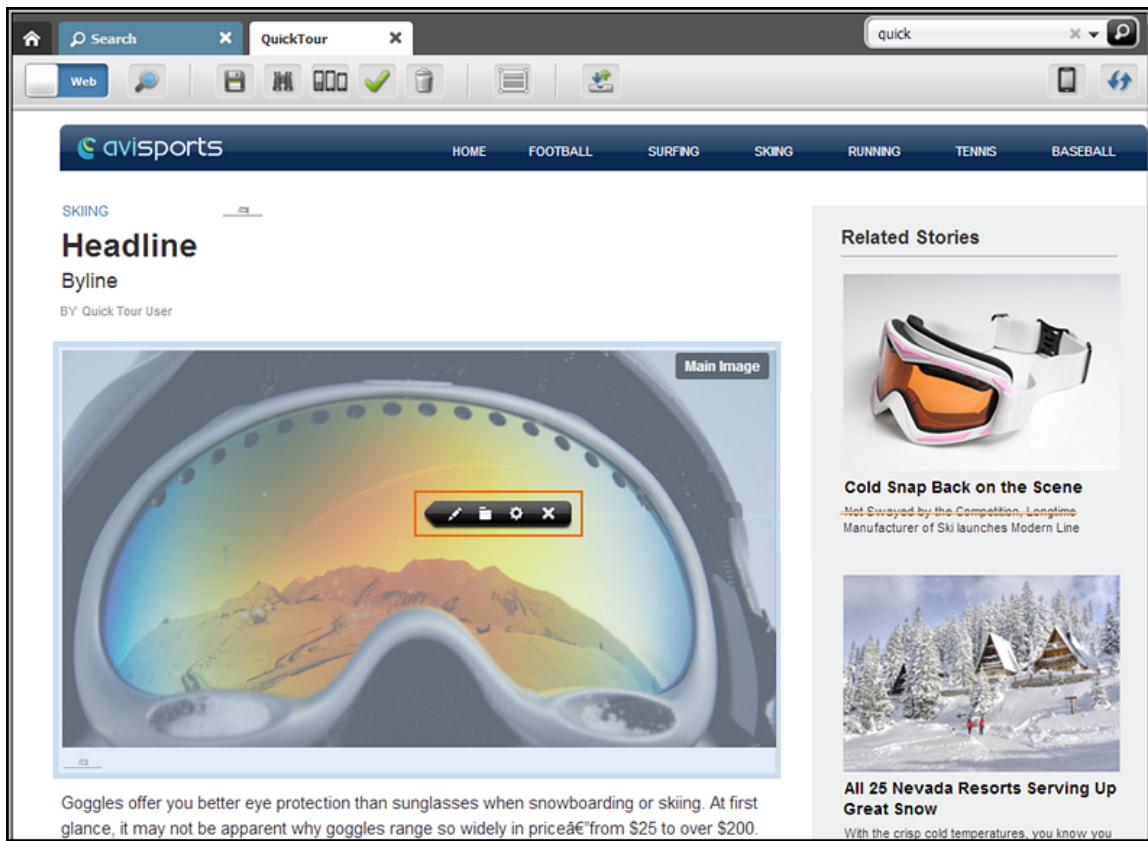
A tab opens in the workspace, showing the asset's Inspect view in Web View.

### 5.3.8 Edit the Asset in Web View

Since you are already viewing your asset in Web View, start off by editing it in Web View:

1. In the asset's toolbar, click **Edit**.  
The Edit view of the asset opens in Web View.
2. Click a slot to open its toolbar, as shown in [Figure 5-12](#).

Figure 5-12 Slot Toolbar



- a. Edit the content of the asset currently placed in the slot by clicking the **Edit** option.
  - b. 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 slot.
3. Click a text area. You will either see a simple text field or a WYSIWYG-enabled text field. Make changes to the content in the field.
  4. In the asset's toolbar, click the **Save** icon.  
WebCenter Sites saves the changes you made to the asset so far, but keeps the Edit view of the asset open.
  5. Since certain fields are only available in Form View, click the **Mode** switch to open the asset in Form View and then continue to [Edit the Asset in Form View](#).

### 5.3.9 Edit the Asset in Form View

The tab displays the Edit view of the asset in Form View (as shown in [Figure 5-13](#)).

**Figure 5-13** Edit View of an Asset in Form View

The screenshot displays the 'Edit View of an Asset in Form View' for an asset named 'QuickTour'. The interface is organized into a browser window with a search bar and a toolbar. Below the toolbar are four tabs: 'Content', 'Marketing', 'Metadata', and 'URL'. The 'Content' tab is selected, showing a form for editing an article titled 'Article: QuickTour'. The form includes the following fields:

- Name:** QuickTour (indicated as a required field with an asterisk and a red arrow pointing to it)
- Tags:** (empty text input)
- Template:** ArticleLayout (dropdown menu)
- Category:** Skiing articles (dropdown menu with a double arrow icon)
- Headline:** QuickTour Headline
- Sub-headline:** QuickTour Sub-headline
- Author:** Quick Tour User
- Main Image:** Rainbow Goggles (image input with a delete icon)
- Body:** (empty text area)

1. Make changes to the content in the **Name** and **Headline** fields.

---

**Note:**

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, you cannot save the asset.

---

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

The CKEditor displays the asset's form with WYSIWYG editor controls.

When CKEditor loads, 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.

3. In the menu bar, click **Save & Close**.

WebCenter Sites saves your changes and closes the asset's tab.

### 5.3.10 Work With the Asset In the Context of a Mobile Device

Let's say that your administrator enabled the Mobility feature and your website will be viewed, not only on desktop/laptop computers, but also on mobile devices. The

Mobility feature enables you to create, edit, and preview content in the context of mobile devices.

Since you have already created your asset and viewed and edited it in both Web View and Form View familiarize yourself with Mobility by viewing and working with the asset in the context of a mobile device:

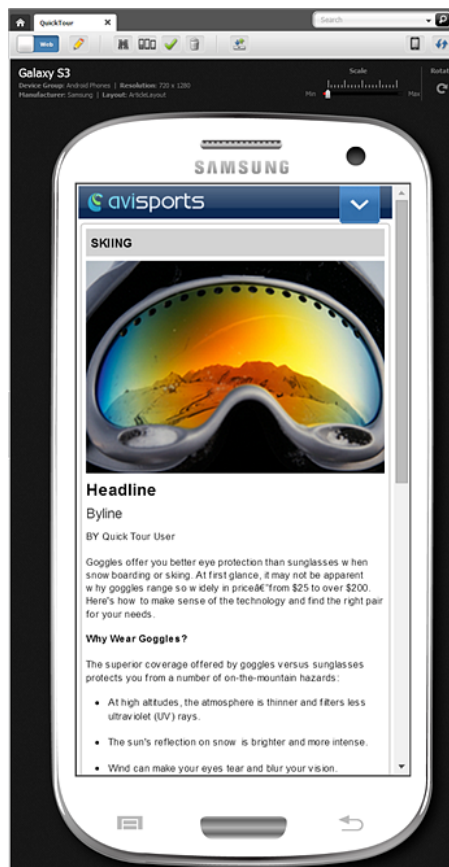
1. If your asset is displayed in Form View, switch to Web View.
2. In the asset's toolbar, click the **Show/Hide Devices** icon.

The device selection panel opens to the right of the asset.

3. Select the device on which you want to display the asset's content.

The asset is displayed in the context of the selected mobile device, as shown in [Figure 5-14](#).

**Figure 5-14** *Asset Displayed in the Context of a Mobile Device*



4. Click the **Edit** icon on the asset's toolbar. Edit the asset in the context of the mobile device as you would edit an asset displayed in Web View. For example, to change the Image asset displayed in the slot, do the following:
  - In the navigation pane, click the **Content Tree** bar.
  - In the **Content Tree**, expand the **Media** node, and then expand the **Skiing images** node.



- Under the **Skiing images** node, drag-and-drop the **Ski Goggles Rust** Image asset to the slot containing the Image asset you want to replace.
5. Save and close the asset. In the menu bar, select **Content**, and then **Save and Close**.

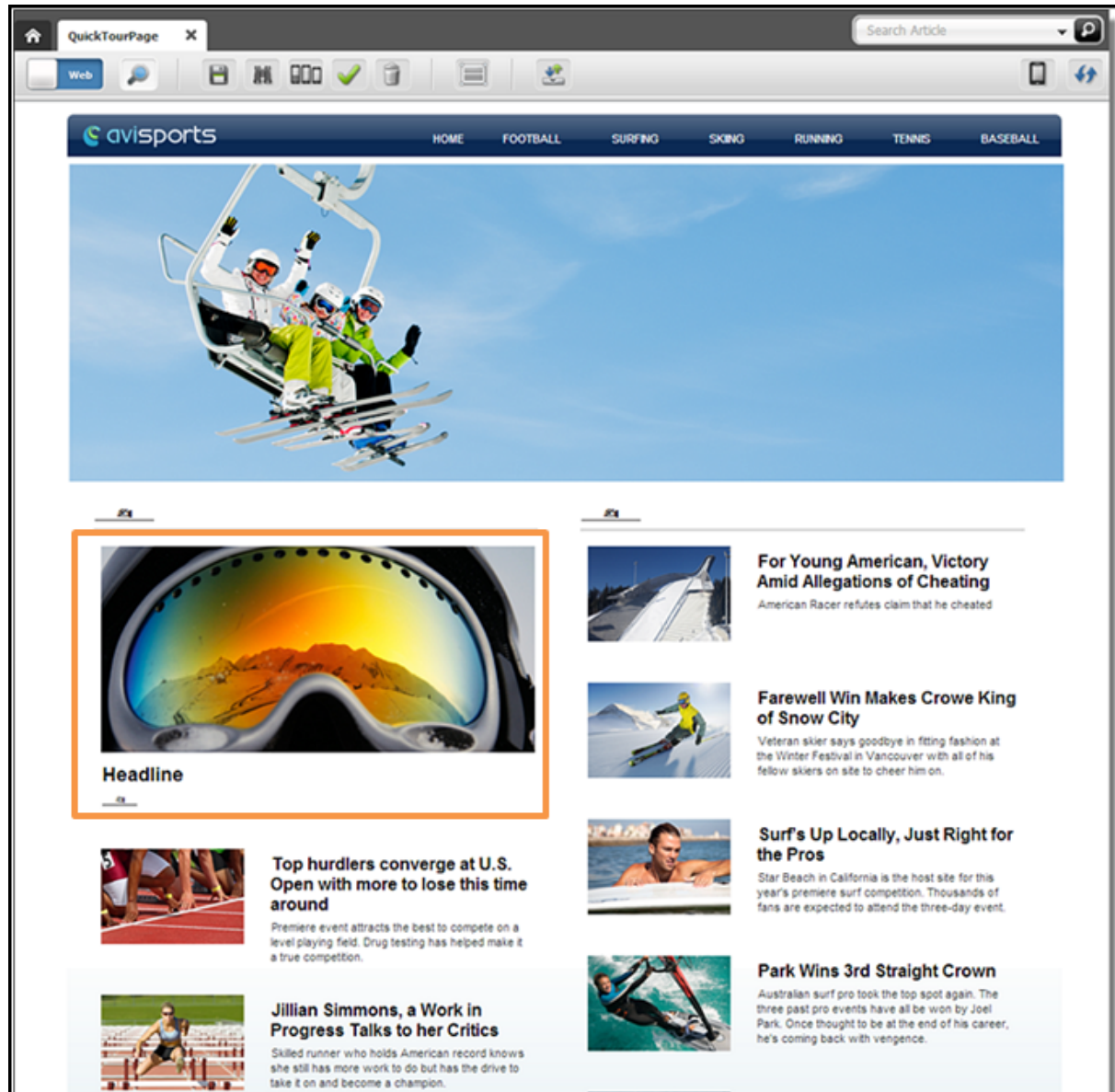
### 5.3.11 Create a Page Asset And Associate Your QuickTour Asset With It

When you are satisfied with the content of your asset, associate it with a Page asset. The Page asset provides the structure and organization for your asset on the website. In this procedure, you will be creating your own Page asset, and then you will associate the QuickTour asset with it:

1. In the menu bar, select **Content, New**, and then select **Page (Section)**.
2. In the Select Layout dialog, do the following:
  - In the **Select Layout** field, select **SectionLayout**.
  - In the **Enter Name** field, enter **QuickTourPage**.
  - Click **Continue**.
3. Add a banner to your Page asset:
  - In the navigation pane, click the **Content Tree** bar.
  - In the **Content Tree**, expand the **Media** node and then expand the **Banners** node.
  - Under the **Banners** node, select a banner and then drag-and-drop it into the Drop Banner Image slot at the top of the Page.
4. Associate the QuickTour asset with the Page:
  - Run a search to find the QuickTour asset.
  - In the search results list that opens to the right of the Page asset, drag-and-drop the QuickTour asset into a slot on the Page that accepts assets of type Article.
5. Populate the rest of the Page with other Article assets.
  - If necessary, clear any existing Search results. In the **Search** field, click the **arrow** icon and then select **Article** from the Search Type menu.  
The Search results list opens to the right of the Page asset.
  - Drag-and-drop an Article asset into each available slot on the Page that accepts assets of type Article.

At this point, your QuickTourPage asset should look similar to the one shown in [Figure 5-15](#).

**Figure 5-15 QuickTourPage Asset Associated With the QuickTour Asset**



6. In the menu bar, select **Content**, and then select **Save & Close**.

### 5.3.12 Include the Page in a Site Navigation

Now that you have associated your QuickTour asset with the QuickTourPage asset, place the Page under a site navigation in the **Site Tree**. The order in which you place Page assets under a site navigation is the order in which the links to those Pages are displayed on the website's navigation menu.

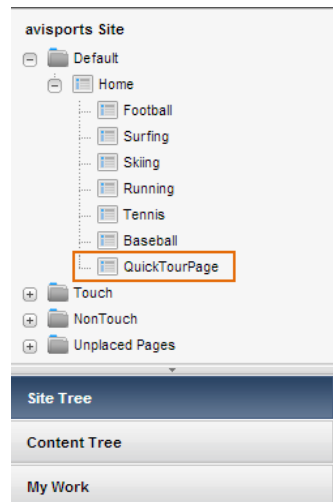
1. In the navigation pane, click the **Site Tree** bar.

The navigation pane displays the **Site Tree**.

2. In the **Site Tree**, expand the **Default** site navigation, and then expand the **Home** Page asset node.

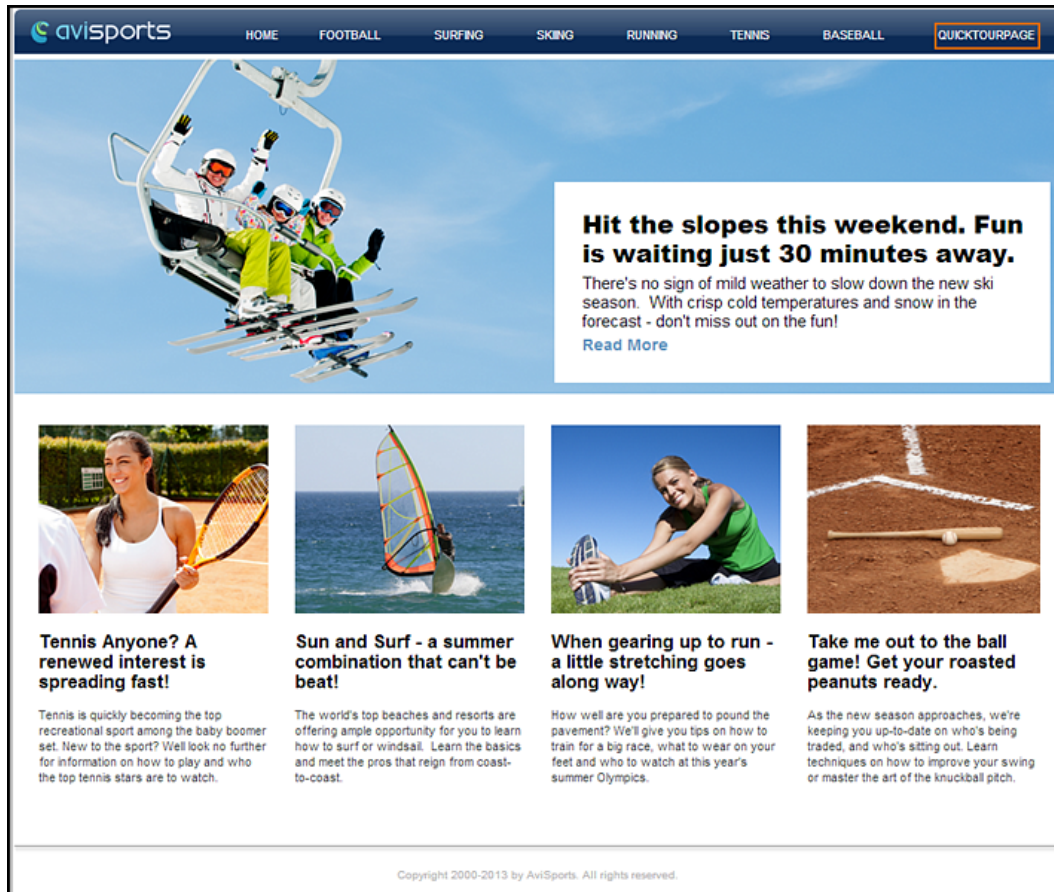
3. Now, expand the **Unplaced Pages** node. You should see the **QuickTourPage** asset listed under this node.
4. Click the QuickTourPage asset, and then drag it to and drop it into its target position in the **Default** site navigation's hierarchy. For the purposes of this quick tour, drag-and-drop the **QuickTourPage** asset so that it is placed directly after the **Baseball** Page asset, as shown in [Figure 5-16](#).

**Figure 5-16** *Placed QuickTourPage Under Default Site Navigation*



When the Default site navigation is published, the link to the QuickTourPage will be displayed in the website's navigation directly after the Baseball link, as shown in [Figure 5-17](#).

Figure 5-17 Website Navigation Displaying a Link to the QuickTourPage



### 5.3.13 Approve and Publish the Page

For your asset to be displayed on the appropriate web page, and for the Page to be displayed in the appropriate position in the website's navigation, approve the Page asset containing the asset you created.

1. In the **Site Tree**, expand the site navigation node under which you placed the QuickTourPage asset.
2. Right-click the placed QuickTourPage asset, select **Approve** from its context menu, and then select **Delivery** as the publishing destination.

A tab opens displaying the QuickTourPage asset's Approval form (shown in [Figure 5-18](#)).

**Figure 5-18 QuickTourPage Asset's Approval Form**

**Delivery**  
Assets pending approval for publish  
No existing publish event

Select All How Does It Work?

Name	Type	Last Published	Status	Detail	Action
QuickTourPage	Page	Not yet published	Held	4 blocking assets	Unapprove
Ski Banner (large)	Image	Not yet published	Approved	Approved and ready to publish.	Unapprove
QuickTour	Article	Not yet published	Needs Approval	Not yet approved for publish.	Approve
Top hurdlers converge at U.S. Open	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove
Jillan Simmons, a Work in Progress	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove
Behind the Hype of Professional Socce...	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove
Dan Oswald likely to Hearing	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove
For Young American, Victory Amid All...	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove
Veteran Skier Says Goodbye	Article	Not yet published	Held	3 blocking assets	Unapprove
Surf Up Locally, Just Right for the Pros	Article	Not yet published	Approved	Approved and ready to publish.	Unapprove

### 3. Click **Approve with Dependencies**.

If the approval is successful, the Page asset and all of its dependencies are now approved to the **Delivery** publishing destination. The QuickTourPage can then be published during the next publishing session (which is set up by your administrator).

If your administrator has created an associated publish event, you can publish the asset directly from the asset's Approval form by clicking **Publish**. The Publish button does not appear if there is no publish event (as in the example above).

## 5.4 Switch to a Different Site

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

1. If the applications bar is not open, click the **down-arrow**, located on the right of the menu bar, to open it.
2. In the **Site** list, select the site you want to access.

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



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## Working with Assets

The avisports sample site is used to illustrate working with assets in the Oracle WebCenter Sites: Contributor interface.

For information about working with assets, see these topics:

- [About the Functions You Can Perform on Assets](#)
- [Creating Assets](#)
- [Editing Assets](#)
- [Working with Attribute Editors](#)
- [Deleting Assets](#)
- [Finding and Organizing Assets](#)
- [Previewing Assets](#)
- [Associating Assets](#)
- [Linking Assets and URLs](#)
- [Defining Website Navigation](#)
- [Working with Multilingual Assets](#)
- [Working with Vanity URLs](#)
- [About Access Permissions](#)

### 6.1 About the Functions You Can Perform on Assets

As a content contributor, you can create, edit, and copy assets, share assets with other sites, and delete assets. If your administrator has enabled locales on your site, you can also create localized assets and multilingual asset sets. Once you have created assets, you can use the search feature in the Contributor interface to find the assets you want to work with. If you are going to be working with the same assets throughout your session, WebCenter Sites provides a variety of ways for you to easily access those assets. These ways include bookmarking assets, accessing assets from the **History** node, tagging assets containing similar content, and saving search criteria.

WebCenter Sites also offers a preview function which enables you to preview assets as they will be displayed on the website when they are published. Since websites change from moment to moment and day to day, WebCenter Sites also offers the Future Preview feature which enables you to view site assets as they will be displayed on the website at any particular moment in the future.

Once you have created your assets, you can associate them with one another and with Page assets by using association fields (configured by your developers). You can also assign child assets to parent assets to further categorize your assets. Additionally, if your assets contain CKEditor enabled fields, you can use the WebCenter Sites-specific icons on the CKEditor toolbar to link assets in a variety of ways within the CKEditor enabled field.

When you have created the Pages for your website, you can then define your website's navigation by placing and unplacing those Pages under a site navigation node in the **Site Tree**.

## 6.2 Creating Assets

You can create assets in the following ways:

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

The types of 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 see only the asset types for which you can create assets.

For information about creating assets, see these topics:

- [Creating an Asset in Form View](#)
- [Creating an Asset in Web View](#)
- [Working with Editable Areas of an Asset's Create View](#)
- [Creating Assets by Copying Existing Assets](#)
- [Sharing Assets with Other Sites](#)

### 6.2.1 Creating an Asset in Form View

To create an asset in form View:

1. From the Contributor interface, select the site in which you want to create the asset.
2. In the menu bar, select **Content**, select **New**, then select the type of asset you want to create.
3. If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, a tab opens displaying the Choose Assignees form.

Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process. For more information, see [Participating in Workflow](#).

A tab opens and shows the asset's Create view as a content entry form (as shown in [Figure 6-1](#)).



**Figure 6-1 New Article Asset Displayed in Form View**

The screenshot shows a web browser window with the title 'New Article'. The browser's address bar contains 'Search'. Below the browser window, there is a navigation bar with tabs for 'Content', 'Marketing', 'Metadata', and 'URL'. The main content area is titled 'Article: New Article' and contains the following form fields:

- \*Name:** A text input field containing 'New Article'.
- Tags:** A text input field.
- Template:** A dropdown menu with 'ArticleLayout' selected.
- Category :** A dropdown menu.
- Headline:** A text input field.
- Sub-headline:** A text input field.
- Post Date:** A text input field with a calendar icon.
- Main Image:** A dashed box containing a hand icon and the text 'Drop Zone'.
- Body:** A large text area.
- Related Stories:** A dashed box containing a hand icon and the text 'Drop Zone'.
- Related Links:** A dashed box containing a hand icon and the text 'Drop Zone'.

4. In the asset's Create view, in the **Name** field, enter a name for the asset. Note the following conventions when naming the asset:
  - The name must 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 (<), greater-than sign (>) and backslash (\).
  - The name can contain spaces, but cannot start with a space.
5. Fill in the asset's content entry form. When populating the form, take note of the following:

- **Required fields.** You must fill in all required fields (marked with an asterisk) before you are permitted to save the asset. Fill in all other fields as necessary.
- **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled by a WYSIWYG editor, such as CKEditor. These text fields allow you to enter and format your content using controls similar to those of Microsoft Word.

To work in a CKEditor-enabled field, click in the field to load CKEditor. For more information, see [Working with the CKEditor](#).

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

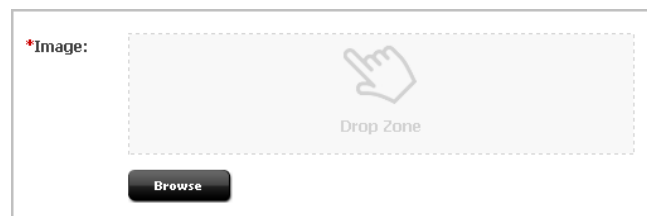
**Figure 6-2 PostDate Field**

A screenshot of a form field labeled "Post Date:". To the right of the text input box is a small calendar icon.

Click the **Pick a date** icon to open the Date Picker attribute editor. For more information, see [Working with the Date Picker](#).

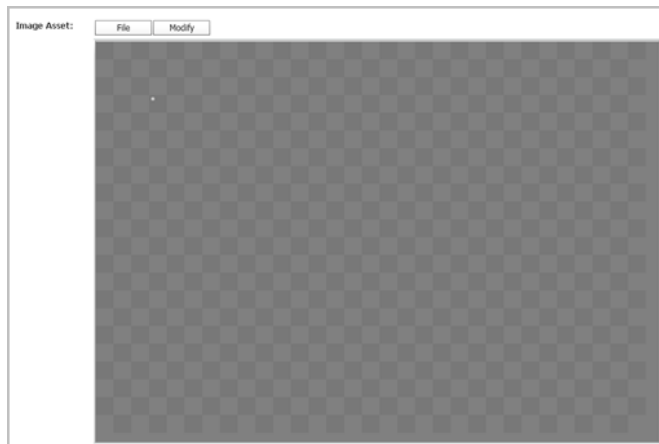
- **Image Picker fields.** You may see one or more fields that prompt you to select an image asset (to be associated with the asset you are creating) through the Image Picker attribute editor. In such cases, you see a **Browse** button under a Drop Zone, as shown in [Figure 6-3](#):

**Figure 6-3 Image Picker Field**

A screenshot of a form field labeled "\*Image:". To the right of the label is a large dashed rectangular area labeled "Drop Zone" with a hand icon pointing to it. Below the drop zone is a "Browse" button.

Click **Browse** to open the Image Picker to the right of the tab displaying the asset. The Image Picker shows either names or thumbnails of the image assets from which you can select. For more information, see [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 6-4](#)).

**Figure 6-4 Clarkii Online Image Editor Field**

For detailed instructions, see [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 list, as shown in [Figure 6-5](#):

**Figure 6-5 Type Ahead Field**

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

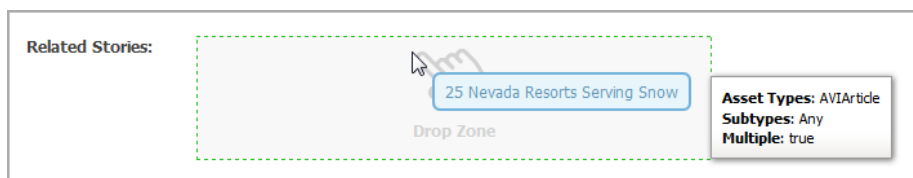
- **Upload fields.** You may see one or more fields that enable you to upload an image file from your local computer, as shown in [Figure 6-6](#):

**Figure 6-6 Upload Field**

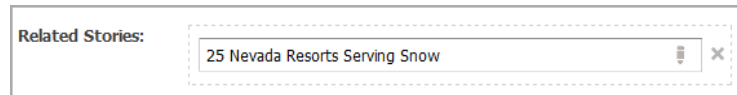
To populate fields such as this, click the **Browse** button to upload an image file from your local computer.

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

When you hover an asset of an accepted type over the field, a green border is shown around the field ([Figure 6-7](#)).

**Figure 6-7 Asset Dragged Over an Association Field**

The populated association field looks similar to [Figure 6-8](#).

**Figure 6-8 Populated Association Field**

WebCenter Sites links the asset you dropped into the association field to the asset you are working with. The association field displays the name of the associated asset. For more information about associating assets, see [Associating Assets](#).

6. (Optional) In the **Tags** field, enter a single word or short phrase to attach to the asset. For instructions, see [Tagging Assets in the Content Entry Form](#).
7. Select the next section in the form section selector and fill in the fields as outlined in step 5. Continue until you have populated all required fields (marked with an asterisk). Populate other form sections as necessary.
8. If you plan to create translations of the asset, or if you are required to specify the language of the content you create, select the asset's target language in the **Locale** drop-down list (located in the **Metadata** section of the form). For more information, see [Working with Multilingual Assets](#).
9. If you want to create a vanity URL for the asset, select the **URL** section of the form. In the **URL** field, specify a vanity URL for the asset. For instructions, see [Creating Vanity URLs for Assets](#).
10. To save the asset, do one of the following:
  - In the asset's toolbar, click the **Save** icon.
  - In the menu bar, select **Content**, then select **Save**.

WebCenter Sites saves the asset to the database, unless:

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

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

11. To inspect the asset, do one of the following:
  - In the asset's toolbar, click the **Inspect** icon.
  - In the menu bar, select **Edit**, then select **Inspect**.

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

12. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in [Using Workflow Functions](#).
13. To preview the asset, click the **Preview** icon in the asset's toolbar.

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

The preview of the asset opens in the tab. For detailed instructions about previewing an asset, see [How Do I Preview Assets?](#)

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

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

The Edit view of the asset opens in the tab. For information about editing assets in Form View, see [Editing Assets in Form View](#).

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

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

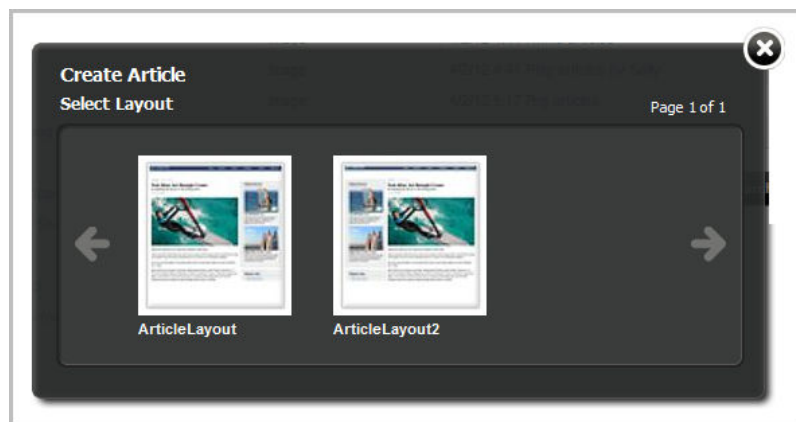
## 6.2.2 Creating an Asset in Web View

To create an asset in web View:

1. From the Contributor interface, select the site in which you want to create the asset.
2. In the menu bar, select **Content**, select **New**, then select the type of asset you want to create.

The *Create Asset* dialog (shown in [Figure 6-9](#)) opens.

**Figure 6-9** *Create Asset Dialog*



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

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

4. In the **Name** field, enter a name for the asset. Keep in mind the following:
  - The name must 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 (<), greater-than sign (>), and backslash (\).
  - The name can contain spaces, but cannot start with a space.
5. Click **Continue**.

---

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**Note:**

If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, the Choose Assignees dialog opens.

Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process. For more information, see [Participating in Workflow](#).

---

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

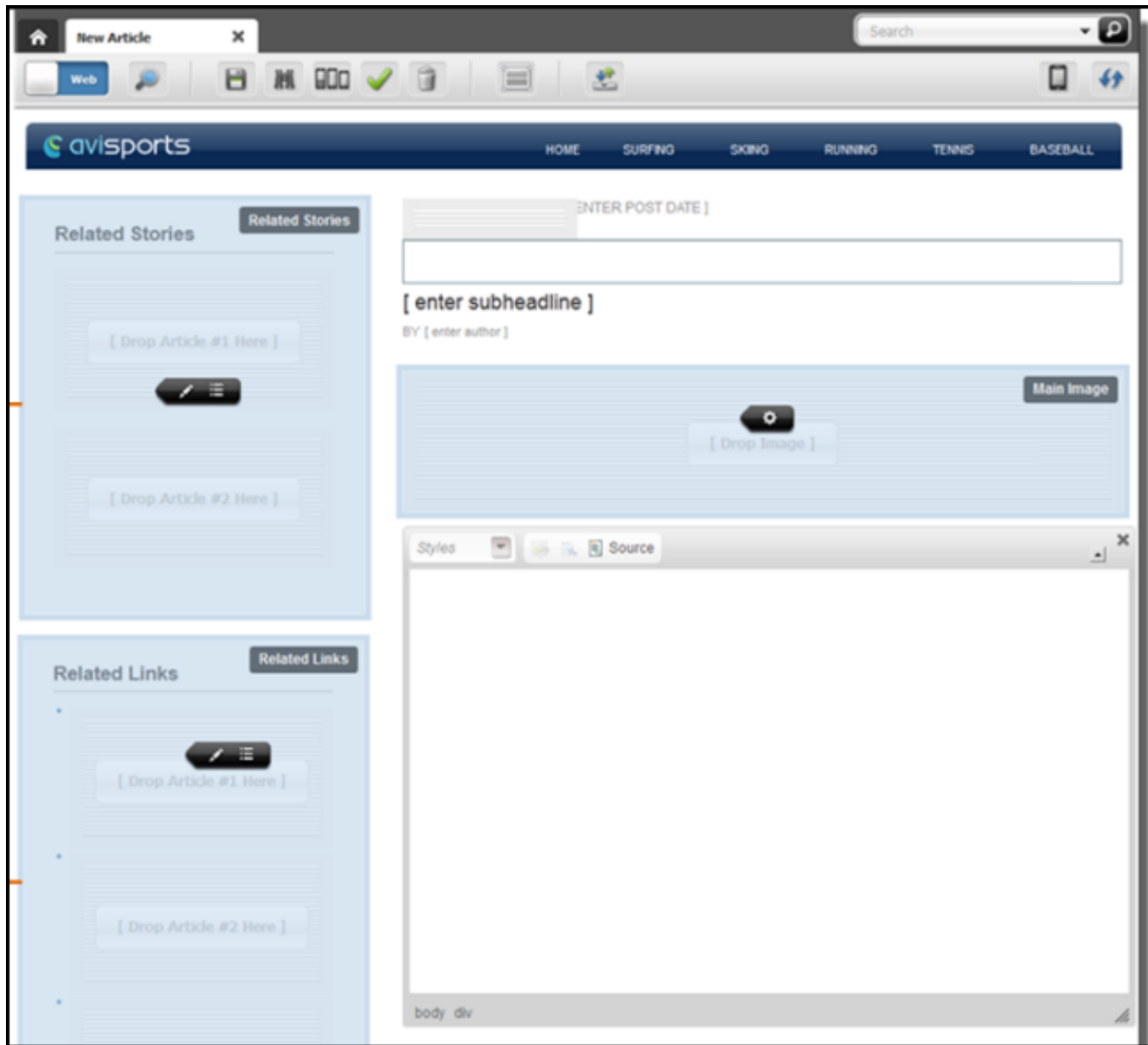
6. Point to the different areas of the asset's Create view to determine which areas accept content.

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

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

[Figure 6-10](#) is an example of the areas you may see when working with an asset in Web View.

Figure 6-10 Slots and Text Fields Displayed in Web View



8. Populate the asset's Create view. See [Working with Editable Areas of an Asset's Create View](#).
9. If the web page layout (template) assigned to the asset you are creating is not coded to display certain fields in Web View, (for example, **Date** and **Locale** fields), then those fields are only available in Form View. To populate these fields, you must switch to Form View. See [Creating an Asset in Form View](#).
10. To save the asset, do one of the following:
  - In the asset's toolbar, click the **Save** icon.
  - In the menu bar, select **Content**, then select **Save**.

WebCenter Sites saves the asset to the database, unless:

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

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

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

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

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

12. (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 [Assigning an Asset to a Workflow](#).

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see [Previewing Assets](#).

To make additional changes to the asset, do the following:

- In the asset's toolbar, click the **Go Back** icon.  
The tab displays the Inspect view of the asset.
- In the asset's toolbar, click the **Edit** icon.  
The tab displays the Edit view of the asset.

For more information about editing assets in Web View, see [Editing Assets in Web View](#).

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

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

### 6.2.3 Working with Editable Areas of an Asset's Create View

Different editable areas are available when populating an asset.

**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 becomes a text-selecting I-beam, as shown in [Figure 6-11](#).

**Figure 6-11** Text Area



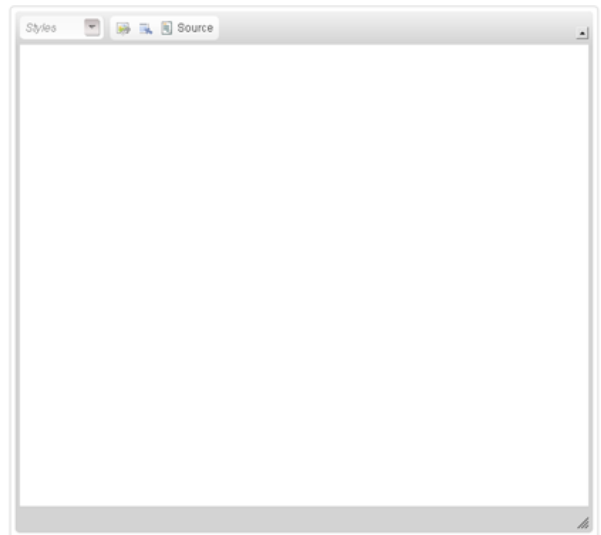
Click the text area to enter your content. When you click the text area, you see one of the following:



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

**WYSIWYG text field.** If the text area supports an embedded WYSIWYG editor (such as CKEditor, shown in [Figure 6-12](#)), the WYSIWYG editor opens. These text fields allow you to enter and format your content using controls similar to Microsoft Word.

**Figure 6-12** *WYSIWYG-Enabled Text Field*



Clicking in a date area loads the Date Picker attribute editor. For more information, see [Working with the Date Picker](#).

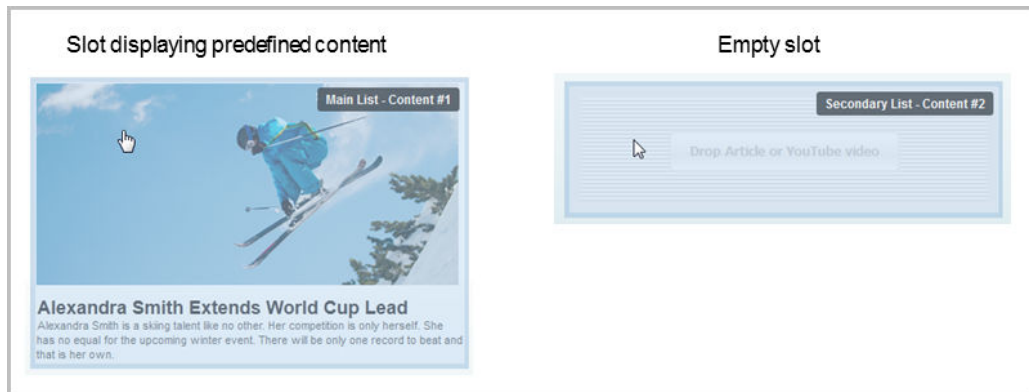
**Date area.** You may see one or more areas that allow you to select a date, as shown in [Figure 6-13](#).

**Figure 6-13** *Date Area*



**Slots.** You may see one or more areas that display either predefined content or an empty slot (as shown in [Figure 6-14](#)). These areas are highlighted with a blue overlay when you point to them.

**Figure 6-14** *Populated and Empty Slot*



To work with a slot:

1. Click a slot to open 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 shown in [Figure 6-15](#).

**Figure 6-15** *Slot Toolbar*



From left to right in the toolbar (shown in [Figure 6-15](#)), the options are:

**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 [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 [Editing the Content of an Asset in Web View](#).

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

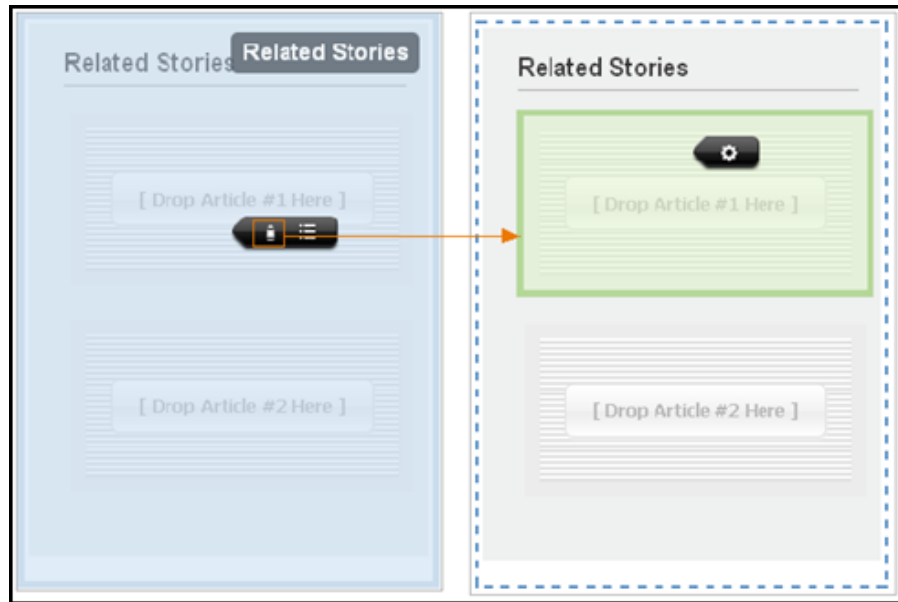
**Slot properties** –Provides you with a list of asset types the slot supports.

**Clear slot** –Removes the content from the slot. For more information, see [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 [Changing the Position of Content Displayed in a Multi-Valued Slot](#).

If the slot is multi-valued, when you click the slot, its toolbar displays the **Edit** and **Manage** options. Click **Edit** to access the individual slots within the multi-valued slot, as shown in [Figure 6-16](#).

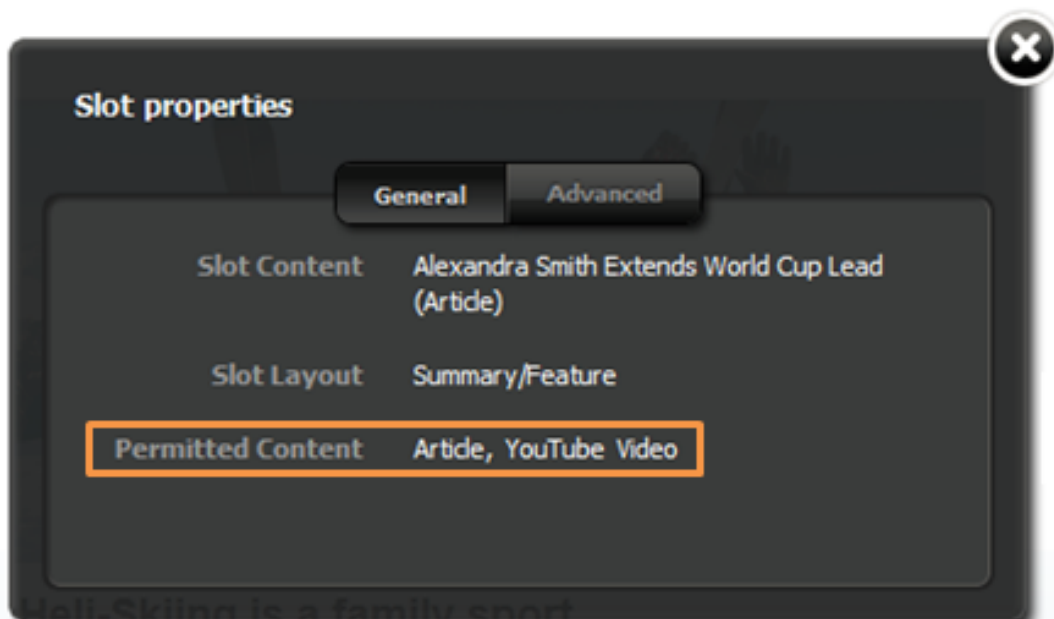
**Figure 6-16 Multi-Valued Slot**

2. Determine the type of content a slot supports. Click the slot and then click the **Slot properties** option in the slot's toolbar.

The Slot properties dialog opens, as shown in [Figure 6-17](#).

3. Drag an asset from the **Content Tree**, **My Work** tree, or a search results list to the slot.
4. If the slot's border turns green, 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 does not accept this type of asset.

For more information about adding content to a slot, see [Adding or Replacing an Association](#).

**Figure 6-17 Slot Properties Dialog**

## 6.2.4 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. You can copy assets displayed in both Form View and Web View.

For information about creating assets by copying existing assets, see these topics:

- [Creating an Asset by Copying an Existing Asset](#)
- [Copying Multiple Assets at the Same Time](#)

### 6.2.4.1 Creating an Asset by Copying an Existing Asset

To create an asset by copying an Existing Asset:

1. From the Contributor interface, select the site containing the asset you want to copy.
2. Find the asset you want to copy and open it in its Inspect view. For instructions, see [Finding and Organizing Assets](#).

A tab opens displaying the Inspect view of the asset you want to copy.

3. In the menu bar, select **Edit** 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 View or Web View. The tab displays the copied asset's name as Copy of *Asset Name\_randomly generated number*.

4. If the copy of the asset opens in Web View, you can either:
  - Work with the copied asset in Web View, see [Editing Assets in Web View](#).
  - Work with the copied asset in Form View, click the **Mode** switch in the asset's toolbar and then continue to step 5.
5. In the Edit view of the copied asset, replace the content in the fields with content for the new asset you are creating.

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 (<), greater-than sign (>), and backslash (\).
- The name can contain spaces, but cannot start with a space.

Optionally, set or change the new asset's locale designation:

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

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

- If the source asset has a locale designation, the new asset retains the locale designation of the source asset.
- If the source asset has no locale designation, neither does the new asset. You must manually assign a locale designation to the new asset.

For more information, see [Working with Multilingual Assets](#).

Populate the remaining fields with content for the new asset.

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

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

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

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 [Assigning an Asset to a Workflow](#).

- Preview the asset by clicking the **Preview** icon in the asset's toolbar.

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

The preview of the asset opens in the tab. For detailed instructions about previewing an asset, see [Previewing Assets](#).

#### 6.2.4.2 Copying Multiple Assets at the Same Time

You can create assets by copying multiple assets at the same time.

To copy multiple assets at the same time:

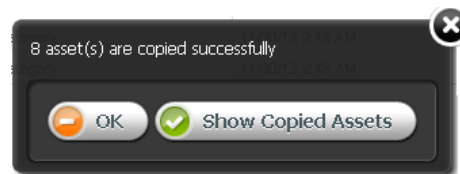
- From the Contributor interface, select the site containing the assets you want to copy.
- Find the assets you want to copy. For instructions, see [Finding and Organizing Assets](#).

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

- In the list of assets, **Ctrl+click** or **Shift+click** the assets you want to copy.
- Right-click the highlighted assets and select **Copy** from the context menu.

The dialog shown in [Figure 6-18](#) opens:

**Figure 6-18 Copy Successful Message**



- In the dialog, do either of the following:
  - To close the dialog 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*.

---

- Open the copied assets and replace the content in the fields with content for the new assets you are creating. For instructions, see [Creating Assets by Copying Existing Assets](#). Repeat these steps until all copied assets have been renamed and their content has been replaced with content for the new assets.

## 6.2.5 Sharing Assets with Other Sites

If you want to use an asset in multiple sites, you can share it so that you do not have to create it multiple times and maintain it across multiple sites.

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**Note:**

To share an asset with another site, ensure that the asset's type is enabled on the site with which you want to share it.

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For information about sharing assets with other sites, see these topics:

- [Which Assets Can You Share?](#)
- [How Do You Share Assets with Other Sites?](#)
- [How Do You Share Multiple Assets with Other Sites?](#)

### 6.2.5.1 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, deleting a shared asset automatically removes it from all sites to which it was shared.
- 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.
- Share the asset only when you are ready to publish it; that is, wait to share the asset until it has been approved.
- 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 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 want to share an asset with another site, but you do not have the appropriate permissions, contact your WebCenter Sites administrator.

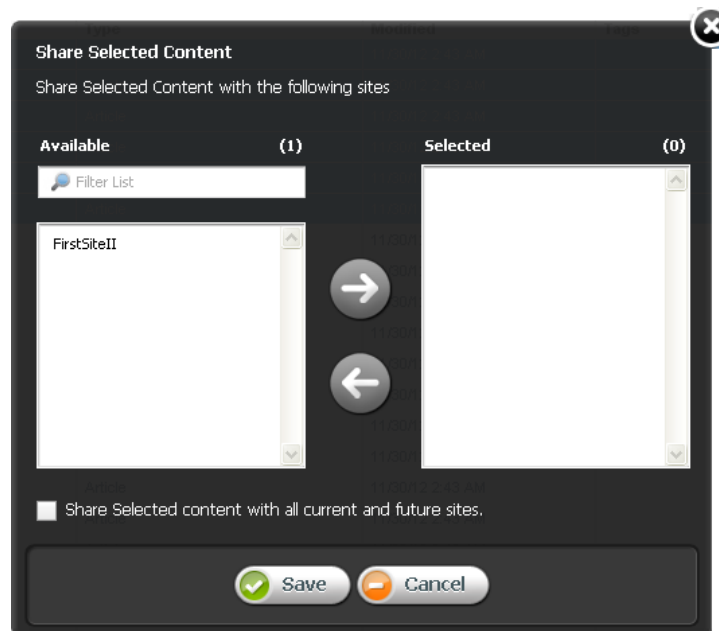
### 6.2.5.2 How Do You Share Assets with Other Sites?

To share assets with other sites:

1. From the Contributor interface, select the site containing the asset you want to share.
2. Find and open the asset you want to share to another site. See [Finding and Organizing Assets](#).
3. In the menu bar, select **Content**, then select **Share**.

The Share Selected Content dialog (shown in [Figure 6-19](#)) opens.

**Figure 6-19** Share Selected Content Dialog



4. In the Share Selected Content dialog, do the following:
  - In the **Available** list box, select the sites to which you want to share the asset and move them to the **Selected** list box.
  - If you want to share this asset with all current and future sites, select the **Share Selected content with all current and future sites** check box.
  - The asset is now accessible on the sites to which you shared it.

### 6.2.5.3 How Do You Share Multiple Assets with Other Sites?

To share multiple assets with other sites:

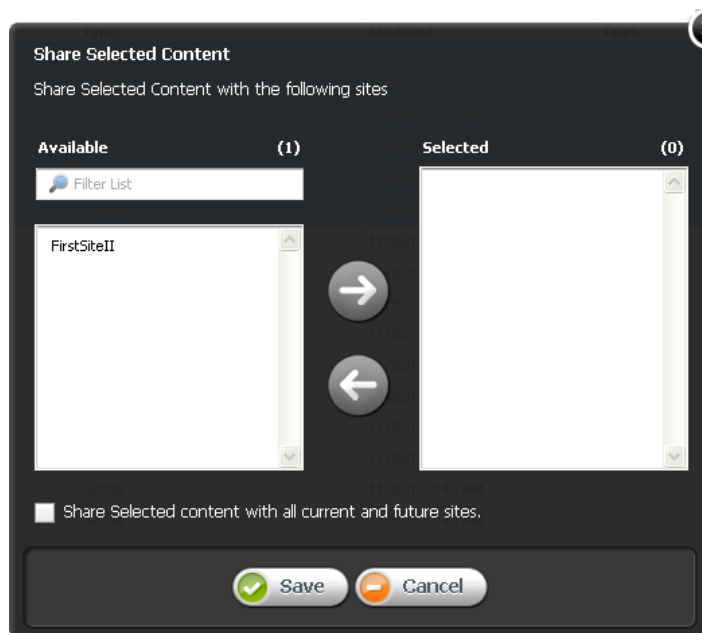
1. From the Contributor interface, select the site containing the assets you want to share.
2. Find the assets you want to share. See [Finding and Organizing Assets](#).
3. In the list of assets, **Ctrl+click** or **Shift+click** the assets you want to share.



- Right-click the highlighted assets and select **Share**.

The Share Selected Content dialog (shown in [Figure 6-20](#)) opens.

**Figure 6-20** Share Selected Content Dialog



- In the Share Selected Content dialog, do the following:
  - In the **Available** list box, select the sites to which you want to share the assets and move them to the **Selected** list box.
  - If you want to share these assets with all current and future sites, select the **Share Selected content with all current and future sites** check box.
  - Click **Save**.

The assets are now accessible on the sites to which you shared them.

## 6.3 Editing Assets

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 Contributor interface. For more information about the permissions you must have to edit assets, see your administrator.

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### Note:

If you have to edit a shared asset, you must edit the asset in its native site (the site on which the asset was originally created).

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For information about editing assets, see these topics:

- [Editing Assets in Form View](#)
- [Editing Assets in Web View](#)

### 6.3.1 Editing Assets in Form View

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

1. From the Contributor interface, select the site containing the asset you want to edit.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. Access the asset's Edit view in Form View:
  - If the asset opens in Web View, switch to Form View. In the asset's toolbar, click the **Mode** switch.
  - In the asset's toolbar, click the **Edit** icon.The tab displays the asset's Edit view in Form View.

4. Make changes to the asset's content. For details on filling in the fields you may see when working with an asset in Form View, see [Creating an Asset in Form View](#).
5. Save the asset. Do one of the following:
  - In the asset's toolbar, click the **Save** icon.
  - In the menu bar, select **Content**, then select **Save**.

WebCenter Sites saves the asset to the database, unless:

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

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

6. Inspect the asset. Do one of the following:
  - In the asset's toolbar, click the **Inspect** icon.
  - In the menu bar, select **Edit**, then select **Inspect**.

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

7. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in [Assigning an Asset to a Workflow](#).
8. Preview the asset:
  - In the asset's toolbar, click the **Preview** icon.
  - If the asset is not assigned a template, the Select Layout dialog opens. Select a layout and click **Apply**.The tab shows the preview of the asset. For detailed instructions about previewing an asset, see [Previewing Assets](#).

## 6.3.2 Editing Assets in Web View

This section covers the following topics:

- [Editing the Content of an Asset in Web View](#)
- [Changing Web Page Layout](#)
- [Changing Content Layout](#)
- [Editing Associations](#)

### 6.3.2.1 Editing the Content of an Asset in Web View

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

To edit the content of an asset in Web View:

1. From the Contributor interface, select the site containing the asset you want to edit.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View.
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.  
The tab re-displays the asset's Inspect view in Web View.
4. Edit the asset:
  - In the asset's toolbar, click the **Edit** icon.  
The tab displays the Edit view of the asset in Web View.
  - Make your changes to the asset.
5. Save the asset by doing one of the following:
  - In the asset's toolbar, click the **Save** icon.
  - In the menu bar, select **Content**, then select **Save**.

WebCenter Sites saves the asset to the database, unless:

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

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

6. Inspect the asset by doing one of the following:
  - In the asset's toolbar, click the **Inspect** icon.

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

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

7. If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in [Using Workflow Functions](#).

8. Preview the asset:

- 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 [Previewing Assets](#).

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

The tab re-displays the asset in Web View.

### 6.3.2.2 Changing Web Page Layout

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

To change the web page layout of an asset:

1. From the Contributor interface, select the site containing the asset whose web page layout you want to change.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View.

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

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

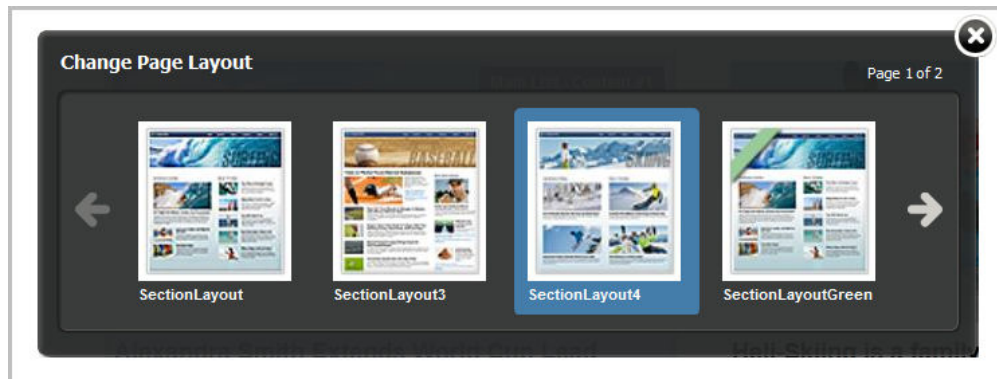
4. In the asset's toolbar, click the **Edit** icon.

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

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

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

The Change Page Layout dialog (shown in [Figure 6-21](#)) opens.

**Figure 6-21** Change Page Layout Dialog

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

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

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

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

WebCenter Sites saves the asset to the database, unless:

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

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

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

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

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

**8.** Preview the asset:

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see [Previewing Assets](#).

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

The tab re-displays the asset in Web View.

### 6.3.2.3 Changing Content Layout

Each slot is assigned a content layout (template). The content layout of a slot determines the appearance of the asset contained within the slot. When you change the content layout of a slot, a Slot asset is created and stored in the WebCenter Sites

database. When you approve the asset, you must also approve the Slot assets associated with that asset. This section provides instructions for changing the content layout (template) of a slot.

To change the content layout of a slot:

1. From the Contributor interface, select the site containing the asset whose slot's content layout you want to change.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View:
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

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

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

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

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

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

The slot toolbar opens.

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

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

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**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.

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The Change Content Layout dialog opens.

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

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

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

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

WebCenter Sites saves the asset to the database, unless:

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

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

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

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

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

8. Preview the asset:

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

The tab displays the preview of the asset. For detailed instructions about previewing an asset, see [Previewing Assets](#).

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

The tab re-displays the asset in Web View.

### 6.3.2.4 Editing Associations

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

This section covers the following topics:

- [Adding or Replacing an Association](#)
- [Editing the Content of an Associated Asset](#)
- [Removing Associations](#)
- [Changing the Position of Content Displayed in a Multi-Valued Slot](#)

#### 6.3.2.4.1 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 want to associate into the slot of the asset you are working with in Web View.

1. From the Contributor interface, select the site containing the asset for which you want to either add or replace an association.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View.
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

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

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

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

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

- Associate an asset to the asset you are working with.

Find the asset you want to place in the slot. See [Finding and Organizing Assets](#).

In the list of assets, select the asset you want to add to the slot, and drag it to the slot.

As you drag the asset to the slot, the asset's name is shown as a floating object. The slot into which you can drop the asset can either be empty or occupied. In [Figure 6-22](#), the asset is being dragged over an empty slot.

**Figure 6-22 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 shown around it. If the slot does not support that type of asset, a red-dotted border is shown around it.

Drop the asset into the slot.

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 populated, the asset you are replacing is removed from the slot and as an association of the asset with which you are working.

- 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 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.

- Inspect the asset by doing one of the following:

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

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

- Preview the asset:

- 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 [Previewing Assets](#).

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

#### 6.3.2.4.2 Editing the Content of an Associated Asset

When working with an asset in Web View, you can edit the content of its associated assets 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.

1. From the Contributor interface, select the site containing the asset that is associated with the asset you want to edit.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View.
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

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

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

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

5. Click the slot containing the associated asset you want to edit.

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

If the slot is multi-valued, when you click it, you 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.

6. Edit the associated asset displayed in the slot. Do one of the following:
  - To edit the associated asset directly in the slot:
    - In the slot's toolbar, click the **Edit** option.
    - Point to the areas of the asset. Any area that becomes highlighted is editable.
    - Make your changes to the associated asset.
  - To edit the associated asset in a new tab:
    - 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 View or Web View.
    - In the associated asset's toolbar, click the **Edit** icon.
    - Make your changes to the associated asset.

If the asset opens in Web View, see [Creating an Asset in Web View](#) for details on the fields you may see.

If the asset opens in Form View, see [Creating an Asset in Form View](#) for details on the fields you may see.

- Save and close the asset. In the menu bar, select **Content**, then select **Save & Close**.
- Switch back to the tab displaying the asset you are working with.
- 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 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.

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 View. When you inspect an asset, you cannot modify its content.

9. Preview the asset:

- 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 [Previewing Assets](#).

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

#### 6.3.2.4.3 Removing Associations

When you are working with an asset in Web View 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.

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the **Contributor** interface.
2. Find and open the asset. See [Finding and Organizing Assets](#).

3. If the asset opens in Form View, switch to Web View.
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.

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

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

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

5. Click the slot containing the asset you want to remove.

The slot's toolbar opens.

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 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.

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 View. When you inspect an asset, you cannot modify its content.

9. Preview the asset:

- 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 [Previewing Assets](#).

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

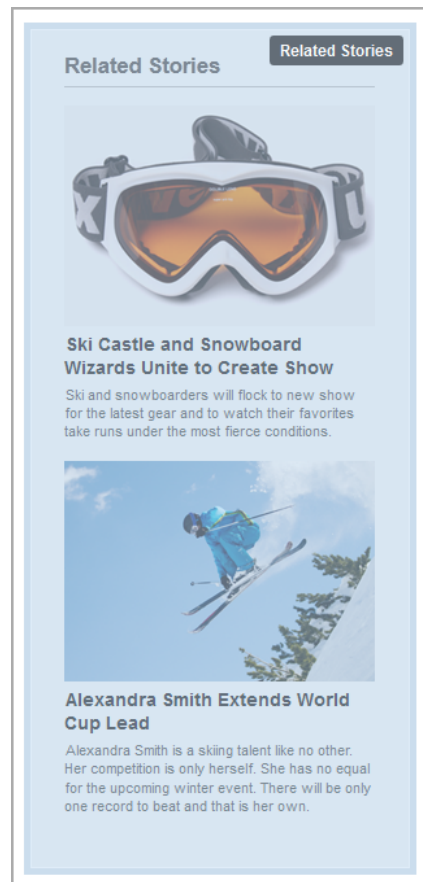
#### 6.3.2.4.4 Changing the Position of Content Displayed in a Multi-Valued Slot

If the asset you are working with in Web View 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.

1. Log in to WebCenter Sites, select the site you want to work with and select the icon for the **Contributor** interface.
2. Find and open the asset. See [Finding and Organizing Assets](#).
3. If the asset opens in Form View, switch to Web View.
  - In the asset's toolbar, click the **Mode** switch.
  - If the asset is not assigned to a template (web page layout), the Select Layout dialog opens. Select a layout and then click **Apply**.  
The tab re-displays the asset's Inspect view in Web View.
4. In the asset's toolbar, click the **Edit** icon.  
The tab displays the Edit view of the asset in Web View.
5. 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 the example shown in [Figure 6-23](#), when you point to the multi-valued slot, the two slots contained within the multi-valued slot are highlighted with a blue overlay.

**Figure 6-23 Multi-Valued Slot**



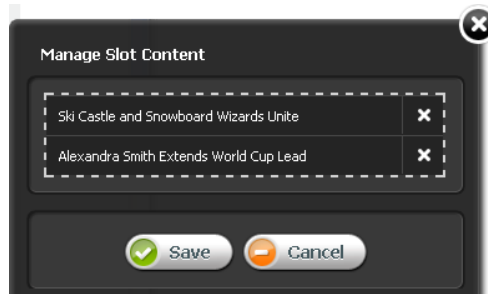
6. Click the multi-valued slot.

The multi-valued slot's toolbar displays the **Edit** and **Manage** options.

7. In the multi-valued slot's toolbar, click the **Manage** option.

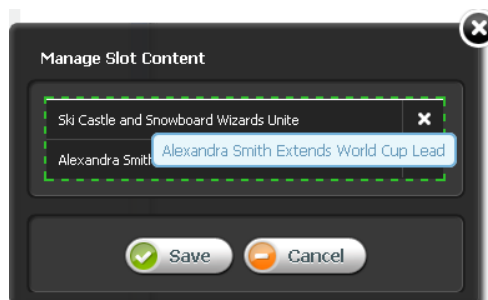
The Manage Slot Content dialog (shown in [Figure 6-24](#)) opens.

**Figure 6-24** *Manage Slot Content Dialog for Multi-Valued Slots*



8. In the Manage Slot Content dialog, reposition the assets displayed in the multi-valued slot. Click the name of the asset and then drag and drop it to its new position in the list (as shown in [Figure 6-25](#)).

**Figure 6-25** *Re-Ordering Assets in a Multi-Valued Slot*



9. Click **Save**.

The assets are displayed in the multi-valued slot in the order you specified.

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 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.

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 View. When you inspect an asset, you cannot modify its content.

12. Preview the asset:

- 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 [Previewing Assets](#).

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

## 6.4 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 covers the following topics:

- [Working with the CKEditor](#)
- [Working with the Image Picker](#)
- [Working with the Clarkii Online Image Editor](#)
- [Working with the Date Picker](#)

### 6.4.1 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. CKEditor also provides advanced features, such as access to your content's underlying HTML code, and the ability to accept preformatted 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.ckeditor.com>.

Several features on the CKEditor toolbar are specific to WebCenter Sites:

- **Add asset link:** Enables you to create a link from one asset to another asset. For more information, see [About Linking Two Assets Directly](#).
- **Include asset:** Enables you to render an asset's previewable content in another asset. For more information, see [Linking Two Assets by Inclusion](#).

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**Note:**

If the included asset is an image, then you can link the image to another asset. For more information, see [About Linking Two Assets Through an Image Asset](#).

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### 6.4.2 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.

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**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
- 
- 

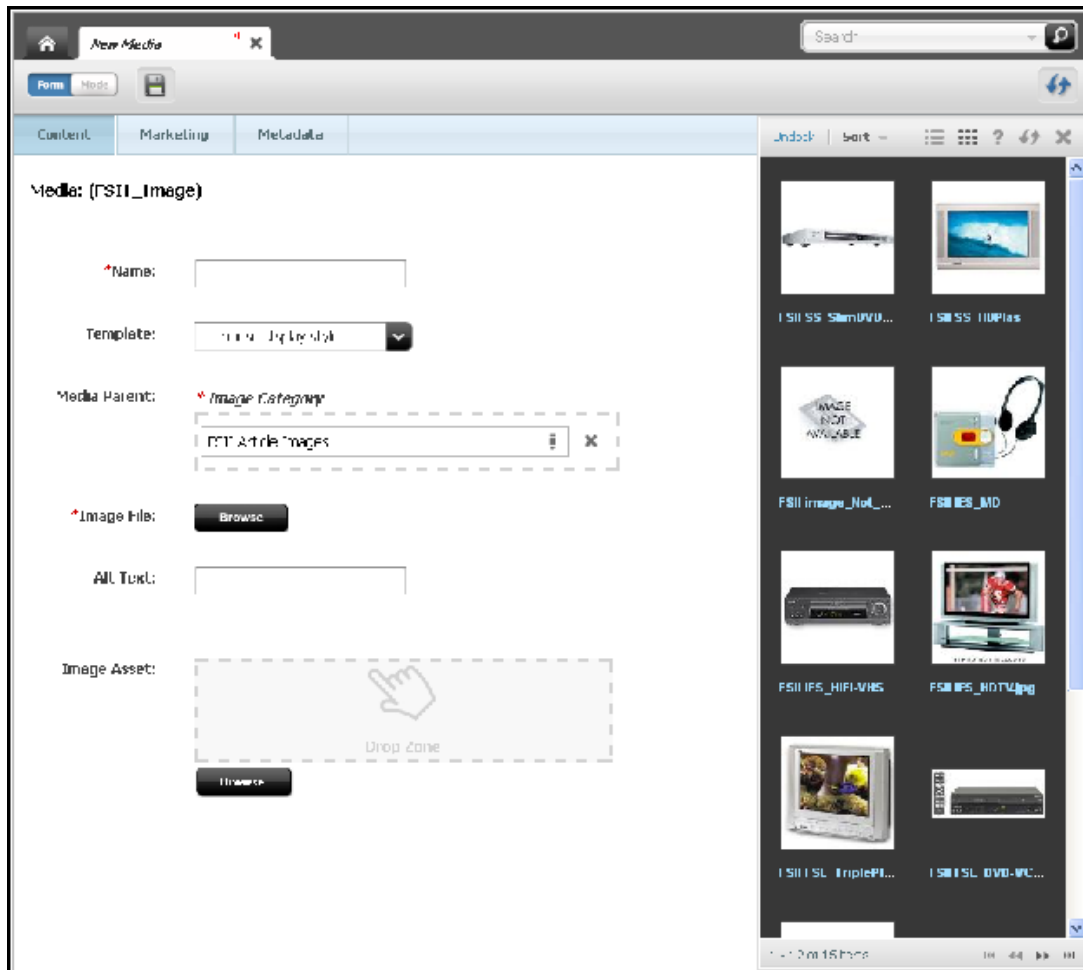
To associate an image asset with another asset using the Image Picker:

1. In a content entry form of an asset displayed in Form View, navigate to the field associated with the Image Picker and click **Browse**.

**Figure 6-26** *Image Picker Field*



The Image Picker opens to the right of the asset's form (shown in [Figure 6-27](#)).

**Figure 6-27 Search Results List Docked to the Right of an Asset**

For each image asset, Image Picker shows either a thumbnail of the image and its file name or only the image's file name (depending on the configurations made by your developers).

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

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

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

### 6.4.3 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 View. 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 text to it.



**Note:**

When working with Clarkii OIE, keep in mind the following:

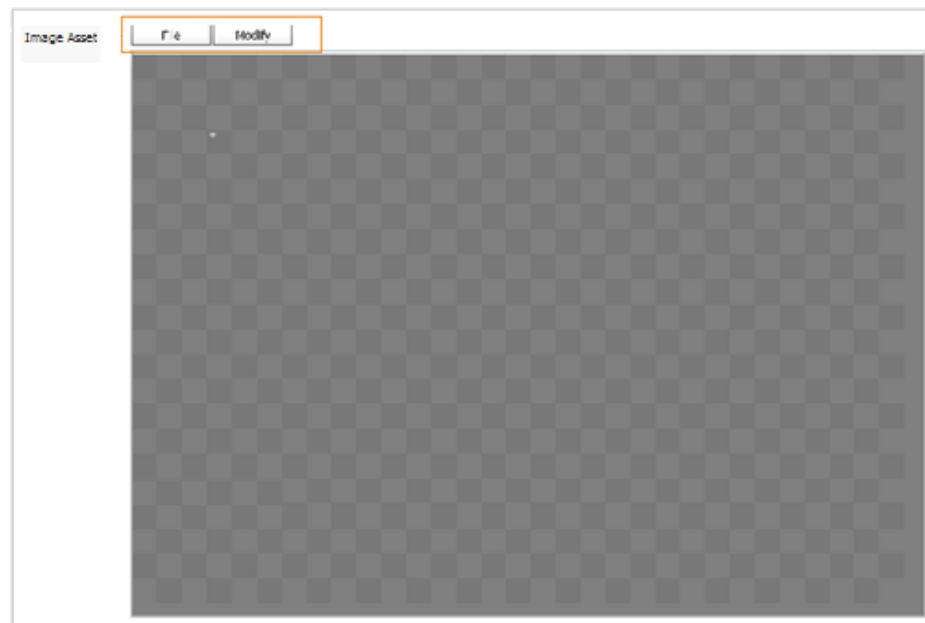
- Clarkii OIE is supported only in Form View.
- Your site developers enable Clarkii OIE on a per-field basis when configuring asset types.
- Clarkii OIE requires you to have Flash installed. If you do not have Flash installed, instead of Clarkii OIE you see a link to download Flash.

For full instructions about using the toolbar and menu options provided by Clarkii OIE, visit the following web site:

<http://www.online-image-editor-clarkii.com/>

Figure 6-28 shows an example view of the Clarkii OIE field rendered in an asset's Edit view in Form View.

**Figure 6-28** *Clarkii Online Image Editor Rendered in an Asset's Field*



When you work with an asset field using Clarkii OIE, you can do one or more 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 to replace the image currently on the canvas. Your developers determine which images are available to you.
- Use the toolbar and menu options available in the Clarkii OIE field to make other edits to the image on the canvas as necessary.

#### 6.4.4 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 can 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.

WebCenter Sites opens the Date Picker dialog.

2. In the Date Picker dialog, select a month, year, time, and day. Ensure you select the day last. When you select the day, the Date Picker dialog 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.

## 6.5 Deleting Assets

This section contains the following:

- [About Deleting Assets](#)
- [Asset Deletion Rules](#)
- [How Do I Delete Assets?](#)

### 6.5.1 About Deleting Assets

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.

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.

### 6.5.2 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.
- If an asset is associated with other assets, WebCenter Sites displays a list of the references preventing deletion. To continue with the deletion, you must first remove the references.

## 6.5.3 How Do I Delete Assets?

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**Caution:**

Be careful when you delete assets. You cannot "undo" a deletion.

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To delete one or more assets:

1. From the Contributor interface, select the site containing the assets you want to delete.
2. In the **Search** field, enter search criteria identifying the asset you want to delete and then click the **magnifying glass** button.

A **Search** tab opens displaying a list of assets matching your criteria.

3. If you want to inspect an asset before deleting it:

- In the search results list, click the name of the asset you want to delete.  
A tab opens displaying the asset's Inspect view (in either Form View or Web View).
- In the asset's toolbar, click the **Delete** icon.

The Delete Asset(s) form opens, containing deletion details for the assets you want to delete.

4. If you want to delete one or more assets without inspecting them:

- In the search results list, select (**Ctrl** +click) the assets you want to delete.
- In the **Search** tab's toolbar, click the **Delete** icon.

The Delete Asset(s) form opens, containing deletion details for the assets you want to delete.

5. In the Delete Asset(s) form, click **Select All** and then click **Delete**.

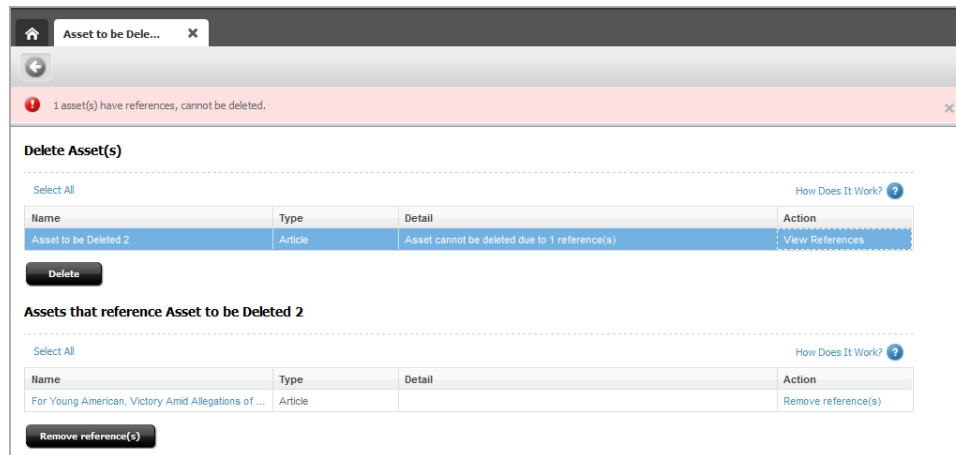
One of the following happens:

- 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 assets 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 table.

The assets blocking the deletion are listed in the Assets that reference *Name of Asset* table (as shown in [Figure 6-29](#)). If you do not remove the references to an asset, the asset cannot be deleted.

**Figure 6-29 Delete Assets Form –Asset Cannot be Deleted**

- Remove the references to the assets you want to delete. Navigate to the table listing the referenced assets, click **Select All** and then click **Remove reference(s)**.

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**Note:**

If you do not want to remove any of the references at this time, you can cancel out of the deletion by clicking the **Go Back** icon.

---



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When you remove the references to the asset you want to delete, the Action column of that asset displays the link **Delete Now**.

- Delete the assets. In the Delete Asset(s) form, select the assets you want to delete and then click **Delete**. You can also delete assets individually by clicking the **Delete Now** link in each asset's Action column.

The database status of the deleted assets changes to `void`. The next time the asset is published, it is deleted from the website.

## 6.6 Finding and Organizing Assets

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

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**Note:**

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

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This section includes the following topics:

- [Search Guidelines](#)
- [Performing a Simple Search](#)
- [Performing an Advanced Search](#)

- [Working with the Search Results List](#)
- [Saving Your Search Criteria](#)
- [Finding Bookmarked Assets](#)
- [Bookmarking Assets](#)
- [Finding Assets from the My Work Tree](#)

## 6.6.1 Search Guidelines

When performing searches in the Contributor interface, use the guidelines in [Table 6-1](#) 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** returns assets that contain **Jack** and assets that contain **jack**.

**Table 6-1 Search Guidelines**

To find...	...do the following	Example
Assets that contain a phrase.	Enclose the phrase in quotes.	To find assets that contain the phrase <b>blue flowers</b> , enter " <b>blue flowers</b> " 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 <b>test</b> or <b>text</b> , enter <b>te?t</b> as your search query. To find assets that contain either <b>book</b> or <b>back</b> , enter <b>b??k</b> 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 <b>test</b> , <b>tester</b> , or <b>testing</b> , enter <b>test*</b> as your search query. To find assets that contain <b>jeanne</b> or <b>jeanine</b> , enter <b>jea*e</b> as your search query.
Assets that contain all of the specified terms.	Join the terms with the <b>AND</b> operator.	To find assets that contain both <b>jack</b> and <b>jill</b> , enter <b>jack AND jill</b> as your search query.
Assets that contain a specific term but do not contain another term you specify.	Exclude the unwanted terms using the <b>NOT</b> operator.	To find assets that contain <b>jack</b> but do not contain <b>jill</b> , enter <b>jack NOT jill</b> as your search query.
Assets that must contain a specific term and may contain another term you specify.	Indicate a required term by preceding it with the <b>+</b> (required) operator.	To find assets that must contain <b>jack</b> and may contain <b>jill</b> , enter <b>+jack jill</b> as your search query.
Assets that contain a specific term, excluding assets that also contain another term you specify.	Precede a term with the <b>-</b> (prohibited) operator to indicate the exclusion.	To find assets that contain <b>jack</b> but exclude those that also contain <b>jill</b> , enter <b>jack -jill</b> as your search query.

**Table 6-1 (Cont.) Search Guidelines**

To find...	...do the following	Example
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 <b>jack</b> , including occurrences that are misspelled, enter <b>jack~</b> as your search query.
Assets that contain special characters (! \$ & * _ - =).	Precede each special character with a backslash (\).	To find assets that contain a hyphen or dash, as in <b>jack - jill</b> enter <b>jack \- jill</b> as your search query.

## 6.6.2 Performing a Simple Search

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### Note:

The asset types for which you can search are determined by your permissions and the asset types available from the Contributor interface.

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To search for an asset:

1. From the Contributor interface, select the site containing the assets you want to find.
2. Specify your search criteria as follows:
  - In the **Search** field, enter your search criteria. Refer to [Search Guidelines](#) to find out how to formulate your search query to narrow the scope of your search.
  - (Optional) In the **Search** field, click the **down-arrow** to render the **Search Type** drop-down list. Select the asset type to which you want to limit your search. If you do not make a selection, WebCenter Sites searches across all asset types in the current site.
3. Click the **magnifying glass** button.

---



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### Note:

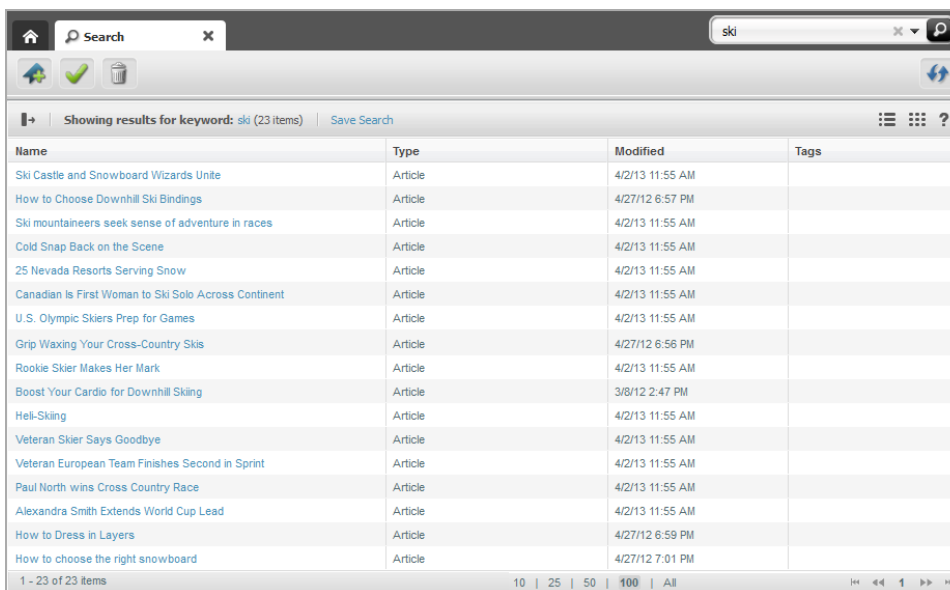
In the Contributor interface, your search results are based on information drawn from a database index which is updated at regular intervals. After creating or editing an asset, there might be a short delay before those changes are reflected in the search results. If you have questions, consult your WebCenter Sites administrator.

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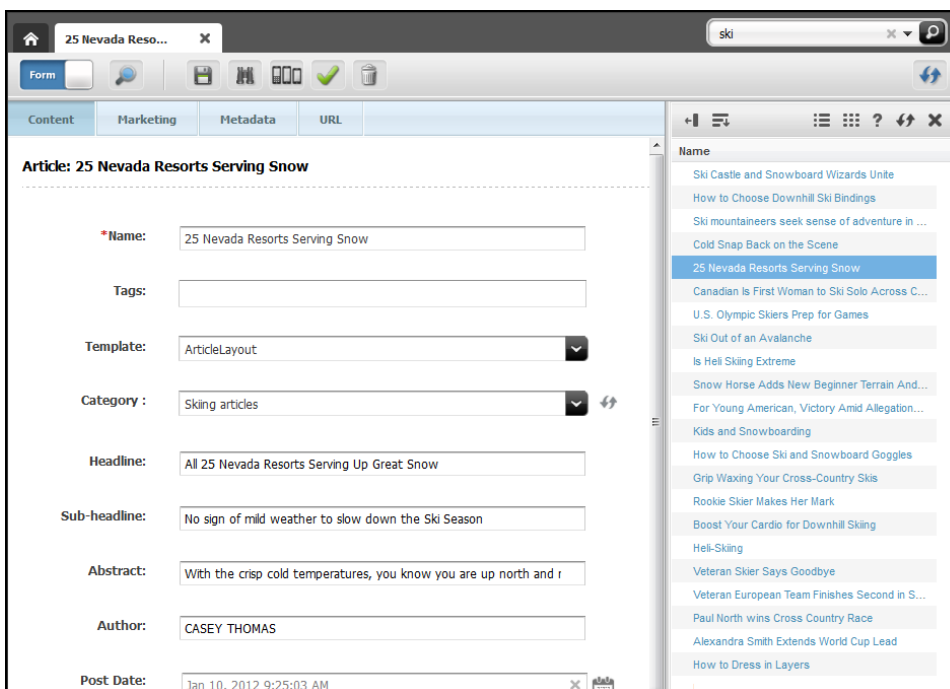


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- If you are not currently working with any assets, WebCenter Sites displays the search results list in a **Search** tab (as shown in [Figure 6-30](#)).

**Figure 6-30 Search Tab**

- If you are working with an asset, the search results list is automatically docked to the right of the workspace (as shown in [Figure 6-31](#)).

**Figure 6-31 Search Results Docked to the Right of an Asset**

4. In the search results list, select the asset (or assets) you want 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 the search results list, see [Working with the Search Results List](#).

## 6.6.3 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, type, and tags – or any combination of these items.

To perform an advanced search for an asset:

1. From the Contributor interface, select the site containing the asset you want to find.
2. In the **Search** field, select the **down-arrow** and then click **Advanced Search**.

The **Search** tab displays the Advanced Search form.

**Figure 6-32** *Advanced Search Form*

3. In the "Find content that contains" section of the Advanced Search form, specify how to match search conditions:
  - In the text box, enter words or phrases for which to search. The same options described in [Search Guidelines](#), can be used in this field.
  - 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.

4. In the "And meets the following conditions" section of the Advanced Search form, specify any other criteria that the results of the search must meet:
  - Search for assets whose names match criteria specified in the **Name** field.
  - Search for assets whose descriptions match 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 match 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 [Working with Multilingual Assets](#).
  - Search for assets created by a specific user by selecting the name of the 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 Admin interface, the Enter search keyword for asset attributes section is shown. Limit a search to specific attributes of an asset type by selecting the attribute from the drop-down list and clicking **Add**.
5. Click **Run Advanced Search** to perform a search using the criteria you specified. To reset the fields in the Advanced Search form, 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.
6. In the search results list, select the asset (or assets) you want 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 [Working with the Search Results List](#).

## 6.6.4 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 limit the number of results that are shown at the same time, sort the results of your search, dock or undock the search results list, and display each asset listed in the search results as thumbnail images.

This section covers the following topics:

- [Docking or Undocking the Search Results List](#)
- [Switching Between List View and Thumbnail View](#)
- [Sorting Your Search Results](#)
- [About Navigating Through Your Search Results](#)

### 6.6.4.1 Docking or Undocking the Search Results List

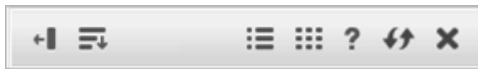
If you are working with an asset while performing a search, your search results are automatically docked to the right of your workspace. If you are not currently working on an asset when you perform a search, the results of your search are displayed in a **Search** tab.

1. 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**.
2. To view the search results list in the **Search** tab, in the toolbar displayed at the top of the search results, click **Undock**.

### 6.6.4.2 Switching Between List View and Thumbnail View

Select whether you want to view your search results in List View or Thumbnail View.

**Figure 6-33** *Docked Search Results List Toolbar*



1. To display your search results as a list, click the **List View** option at the top of the search results list.
2. 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.

### 6.6.4.3 Sorting Your Search Results

To sort your search results:

1. If your search results are displayed in the **Search** tab (undocked) in List View, sort your search results by clicking a column:
  - **Name**
  - **Type**

- **Locale**
- **Modified**
- **Tags**

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**Note:**

After you have sorted your results, click the same column again to reverse the sort order.

---



---

2. If the search results list is docked to the right of the workspace 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.

#### 6.6.4.4 About 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 use the toolbar to limit the number of search results, skip to the next page of results, go back to the previous page of results, skip to the last or first page of results, or go to a specific page of results.

### 6.6.5 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.

For information about saving your search criteria, see the following topics:

- [Saving Your Search Criteria to Your "Saved Searches" Widget](#)
- [Saving Search Criteria as an Asset \(of Type ContentQuery\)](#)

#### 6.6.5.1 Saving Your Search Criteria to Your "Saved Searches" Widget

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 widget on 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.

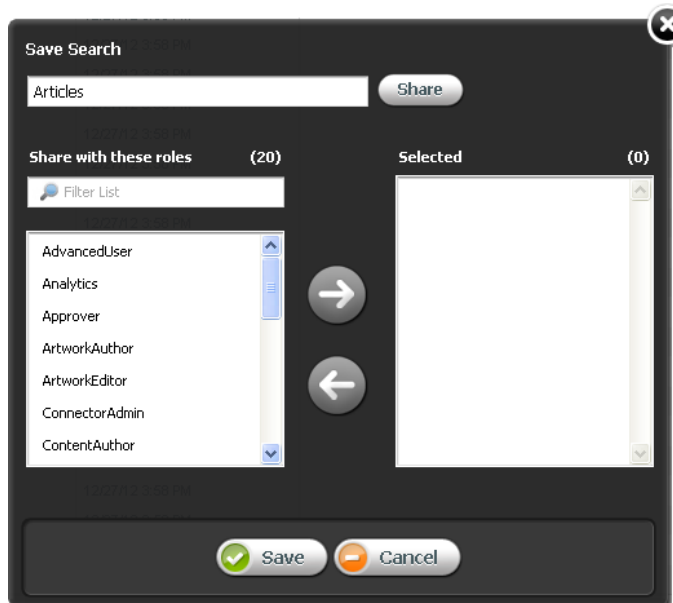
To save your search criteria as a Saved Search:

1. Ensure the search results list is displayed in the **Search** tab. If the search results list is docked, click **Undock**.
2. Click **Save Search**.

The Save Search dialog opens.

- In the **Enter Name** field, enter a name to uniquely identify the search criteria you want to save.
- To share this Saved Search with other WebCenter Sites users, click **Share**. In the **Available** list box, select the roles with which you want to share this Saved Search and move them to the **Selected** list box.

**Figure 6-34 Save Search –Share with Other Sites**



- Click **Save**.
- The Saved Searches widget on your dashboard (in the **Home** tab) displays the name of your Saved Search. If you shared the Saved Search, any users with the roles you specified see the Saved Search in their dashboards.
3. To perform a search using the same search criteria you specified when you created the Saved Search:
    - Access the dashboard by clicking the **Home** tab.
    - In the Saved Searches widget on your dashboard, select the Saved Search containing the criteria for which you want to search.

The **Search** tab opens displaying up-to-date results matching the saved search criteria.

### 6.6.5.2 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. From the Contributor interface, select the site in which you want to create a ContentQuery asset.
2. 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 [Participating in Workflow](#).

---

A tab opens displaying the asset's content entry form (Form View).

3. In the ContentQuery asset's content entry form, do the following:
  - 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 (<), greater-than sign (>), and backslash (\).
  - ◆ 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 list, select the order in which the results of the query are 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 list, select whether the query results are shown in **Ascending** or **Descending** order.

- 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 want to save as an asset. For information about filling in the fields, see [Performing an Advanced Search](#).

4. Test the results of the query. In the **Query** section, click **Run Advanced Search**.

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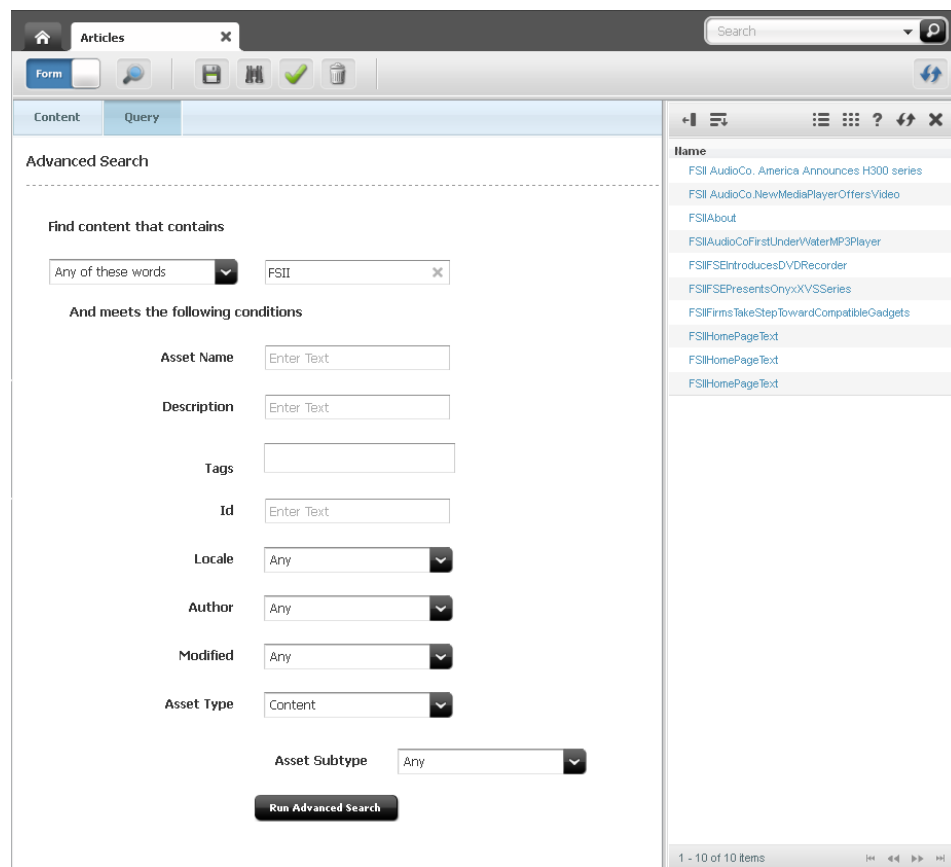
**Note:**

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 6-35 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:

- In the asset's toolbar, click the **Preview** icon.  
The Select Layout dialog opens.
  - In the Select Layout dialog, select a 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 [Associating Assets](#). For instructions on publishing assets, see [Publishing an Approved Asset](#).
- When a site visitor accesses the web page, the ContentQuery asset executes its query and renders the results to site visitors.

## 6.6.6 Finding Bookmarked Assets

Bookmarked assets can be accessed in the following ways:

- From the Bookmarks widget on the dashboard (in the **Home** tab).
- From the **My Work** tree under the **Bookmarks** node.

For information about finding bookmarked assets, see the following topics:

- [To find bookmarked assets on the dashboard](#)
- [To find bookmarked assets in the My Work tree](#)

### 6.6.6.1 To find bookmarked assets on the dashboard

1. In the Contributor interface, select the site containing the bookmarked assets you want to find.
2. On the dashboard (in the **Home** tab), navigate to the Bookmarks widget.
3. In the Bookmarks widget, navigate to and click the name of the asset you want to view.

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

### 6.6.6.2 To find bookmarked assets in the My Work tree

1. In the Contributor interface, select the site containing the bookmarked assets you want to find.
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 shown underneath the **Bookmarks** node.

4. Navigate to and double-click the asset you want to view.

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

## 6.6.7 Bookmarking Assets

Bookmarking allows you to add select assets to the **Bookmarks** node in the **My Work** tree and to the Bookmarks widget on your dashboard (located in the **Home** tab). This makes those assets easy to retrieve at a later time.

For information about bookmarking assets, see the following topics:

- [Bookmarking a Single Asset](#)
- [Bookmarking Multiple Assets](#)
- [Unbookmarking an asset from the Bookmarks node](#)
- [Unbookmarking assets from the Bookmarks widget](#)

### 6.6.7.1 Bookmarking a Single Asset

The following procedure provides instructions for bookmarking an asset that is open in your workspace.

1. From the Contributor interface, select the site containing the asset you want to bookmark.
2. If the asset is open in your workspace, skip to step 3. Otherwise, find and open the asset from any of the following locations:
  - a search results list
  - under a site plan node in the **Site Tree**
  - under a parent asset's node in the **Content Tree**
  - under the **History** node in the **My Work** tree

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**Note:**

The assets listed in the **History** node are cleared every time you log out of WebCenter Sites. To make these assets easily accessible for later use, bookmark them before you end your current WebCenter Sites session.

---

---

3. In the menu bar, select **Content**, and then select **Bookmark**.

The asset is listed under the **Bookmarks** node in the **My Work** tree and in the Bookmarks widget on your dashboard.

### 6.6.7.2 Bookmarking Multiple Assets

The following procedure provides instructions for bookmarking multiple assets from a search results list.

1. From the Contributor interface, select the site containing the assets you want to bookmark.
2. Perform a search, as described in [Performing a Simple Search](#). To conduct an advanced search, see [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. In the search results list, select (**Ctrl** + click) the assets you want to bookmark.
5. In the **Search** tab's toolbar, click the **Bookmark** icon.

A message is shown stating the number of bookmarks that were created. WebCenter Sites adds the selected assets to the **Bookmarks** node in the **My Work** tree and the Bookmarks widget on your dashboard.

### 6.6.7.3 Unbookmarking an asset from the Bookmarks node

To unbookmark an asset from the Bookmarks node:

1. From the Contributor interface, select the site containing the asset you want to unbookmark.
2. In the navigation pane, click the **My Work** bar to open the **My Work** tree.
3. In the **My Work** tree, expand the **Bookmarks** node by clicking the plus-sign.

A list of bookmarked assets is shown underneath the **Bookmarks** node.

4. In the list of bookmarked assets, double-click the asset you want to unbookmark.

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

5. In the menu bar, select **Content**, then select **Unbookmark**.

A message is shown 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 widget on your dashboard (in the **Home** tab).

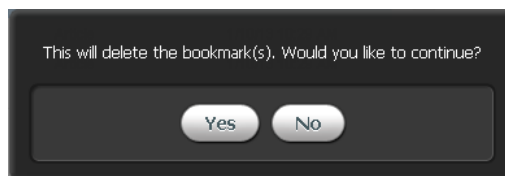
### 6.6.7.4 Unbookmarking assets from the Bookmarks widget

To unbookmark assets from the Bookmarks widget:

1. From the Contributor interface, select the site containing the asset you want to unbookmark.
2. Navigate to the Bookmarks widget on your dashboard (located in the **Home** tab).
3. In the Bookmarks widget, select the row containing the asset you want to remove.
4. Click **Delete Bookmark**.

A dialog opens and displays the message shown in [Figure 6-36](#).

**Figure 6-36 Delete Bookmark Dialog**



5. Click **Yes**.

WebCenter Sites removes the asset from the Bookmarks widget on your dashboard and from the **Bookmarks** node in the **My Work** tree.

## 6.6.8 Tagging Assets

WebCenter Sites allows you to organize assets by applying tags to them.

For information about tagging assets, see these topics:

- [About Tagging Assets](#)
- [Creating Tags in the My Work Tree](#)
- [Adding Existing Tags to the My Work Tree](#)
- [Finding Assets from the My Work Tree](#)
- [Tagging Assets in the Content Entry Form](#)
- [Tagging Assets from a Search Results List](#)

### 6.6.8.1 About Tagging Assets

A **Tag** is a single word or short phrase (label) that you apply to assets that share one or more common factors (for example, a theme or topic).

- A tag must be between 1 and 32 alphanumeric characters. The only other characters allowed are underscore (\_) and hyphen (-).
- Tags can be applied to basic assets, flex assets, and page assets. You can apply a tag to an asset either from the asset's content entry form or from a search results list.
- You can create tags at the same time as you apply them, or you can create them in advance in the My Tags folder of the My Work tree.
- You can add existing tags to the My Tags folder, and from there you can open a list of assets that have been given a tag.
- After an asset is tagged, you can perform an advanced search to find the tagged asset and all other assets that have been given the same tag.

### 6.6.8.2 Creating Tags in the My Work Tree

You can create tags in the My Tags folder of the My Work tree and later apply them to assets.

To create tags in the My Work tree:

1. In the Tags section of the My Work tree, right-click the My Tags folder and select **Add Tag**.
2. In the Add Tag dialog, enter a name for the tag, then click **Save**.

The new tag is listed beneath the My Tags folder. The figure 0 in brackets indicates that no assets have yet been given this tag.

The tag you created is now available for applying to assets. See [Tagging Assets in the Content Entry Form](#) and [Tagging Assets from a Search Results List](#).

In the My Tags folder, you can double-click the tag name to open a list of assets that have been given that tag.

### 6.6.8.3 Adding Existing Tags to the My Work Tree

You can add tags that you have created elsewhere to the My Tags folder of the My Work tree.

To add existing tags to the My Work tree:

1. In the Tags section of the My Work tree, right-click the My Tags folder and select **Add Tag**.
2. In the Add Tag dialog, click anywhere within the field, then enter the first few characters of the tag's name to display a list of existing tags.
3. Select a tag from the drop-down list, then click **Save**.

The tag is listed beneath the My Tags folder. The figure in brackets indicates how many assets have been given this tag.

In the My Tags folder, you can double-click the tag name to open a list of assets that have been given that tag.

### 6.6.8.4 Finding Assets from the My Work Tree

You can use the My Tags folder of the My Work tree to find assets that have been given a tag.

- In the My Tags folder, double-click a tag name to open a list of assets that have been given that tag.

### 6.6.8.5 Tagging Assets in the Content Entry Form

You can add tags to an asset directly in the asset's content entry form.

This procedure assumes you are using a content entry form as described in [Creating an Asset in Form View](#).

To tag an asset on its content entry form:

- 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 enter a pre-existing one. If the first letters you type into the field match a pre-existing tag, that tag will be shown in the field. You can enter multiple tags in the same field by pressing **Enter** or the semicolon key (;) between each one.

### 6.6.8.6 Tagging Assets from a Search Results List

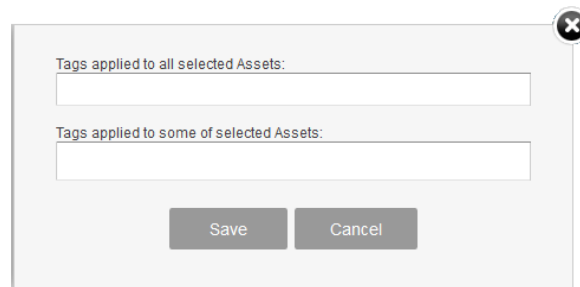
You can add tags to assets in a search results list.

This procedure assumes that you have created a search results list, as described in [Performing a Simple Search](#) or [Performing an Advanced Search](#), and that the search results list is undocked.

To tag assets from a search results list:

1. In the search results list, select (**Ctrl**+click) the assets you want to tag.
2. Right-click a selected asset, then click **Tag**. This opens the Add Tag dialog.

**Figure 6-37 Add Tag Dialog**



If some of the assets already have tags, those tags are listed in the **Tags applied to some selected Assets** field.

3. In the **Tags applied to all selected Assets** field, enter a single word or short phrase to attach to the selected assets.

You can either enter a new tag into this field or enter a pre-existing one. If the first letters you type into the field match a pre-existing tag, that tag will be shown in the field. You can enter multiple tags in the same field by pressing **Enter** or the semicolon key (;) between each one.

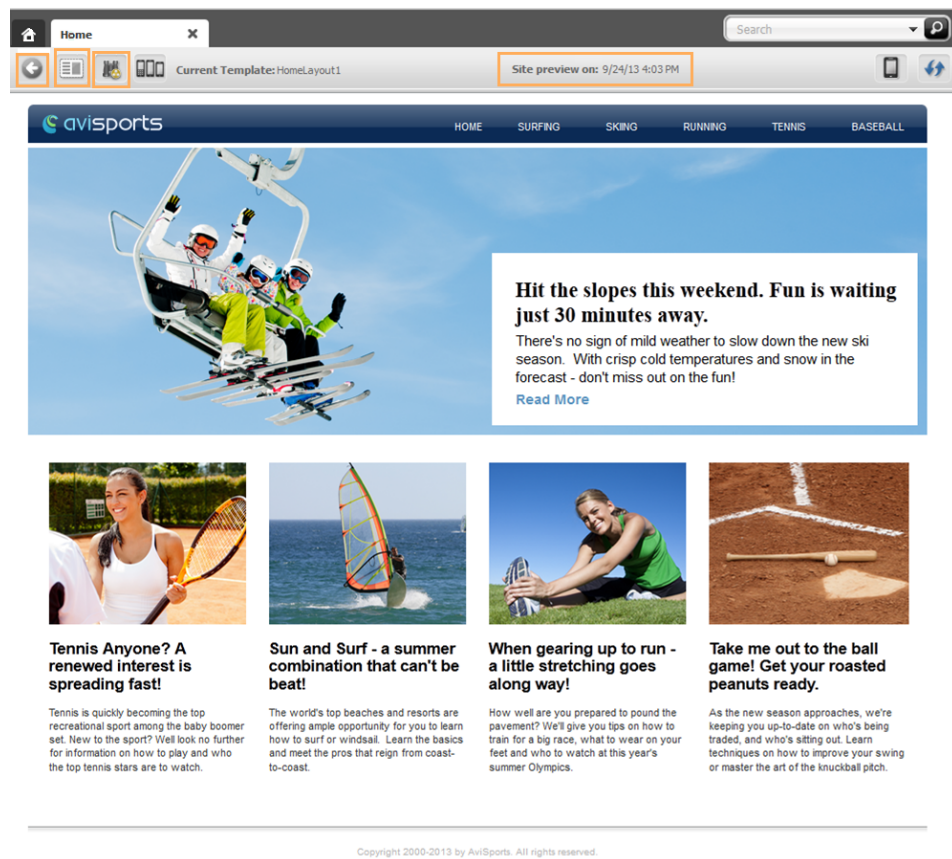
4. (Optional) To remove a tag that some of the selected assets are tagged with, click its X button in the **Tags applied to some selected Assets** field.
5. Click **Save**.
6. In the Search toolbar, click the **Refresh** icon.

The tags you added to the selected assets are displayed in the **Tags** column of the search results list.

## 6.7 Previewing Assets

The Contributor interface allows you to preview how an asset will look on the website when published (as shown in [Figure 6-38](#)). 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 6-38** Preview of the Avisports Sample Site's Home Page 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.

### 6.7.1 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 asset you want to preview. 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 asset and preview it directly from the tree or open the 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 want to preview. In the **Browse** tab that lists the assets associated with the parent asset, navigate to and preview the desired asset.

- Preview an asset you are currently working with.

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**Note:**

This chapter shows you how to preview an asset by using the **Search** field in the Contributor interface.

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To preview an asset:

1. From the Contributor interface, select the site containing the asset you want to preview.
2. Find and open the asset you want to preview. For instructions, see [Finding and Organizing Assets](#).
3. In the asset's toolbar, click the **Preview** icon.

The tab displays the preview of the asset.

4. Preview how the asset would look on the website if it were rendered by a different template.
  - 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 opens.

- Select the template with which you want to preview the asset. (In this example, we selected the `/FSIIDetail` template, which renders the content of the asset without a surrounding layout).
- Click **Apply**.

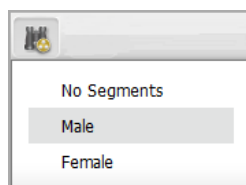
The tab displays the asset as it would be displayed on the website if it were rendered by the template you selected.

5. Preview the asset with segments:

- In the menu bar, select the **Preview with Segments** icon.

A drop-down list opens listing the available segments (shown in [Figure 6-39](#)).

**Figure 6-39 Preview with Segments Icon**



- In the drop-down list, select the segment with which you want to preview the asset.

The tab refreshes and shows the preview of the asset with the selected segment. For information about segments, see [Grouping Visitors into Segments with Engage](#).

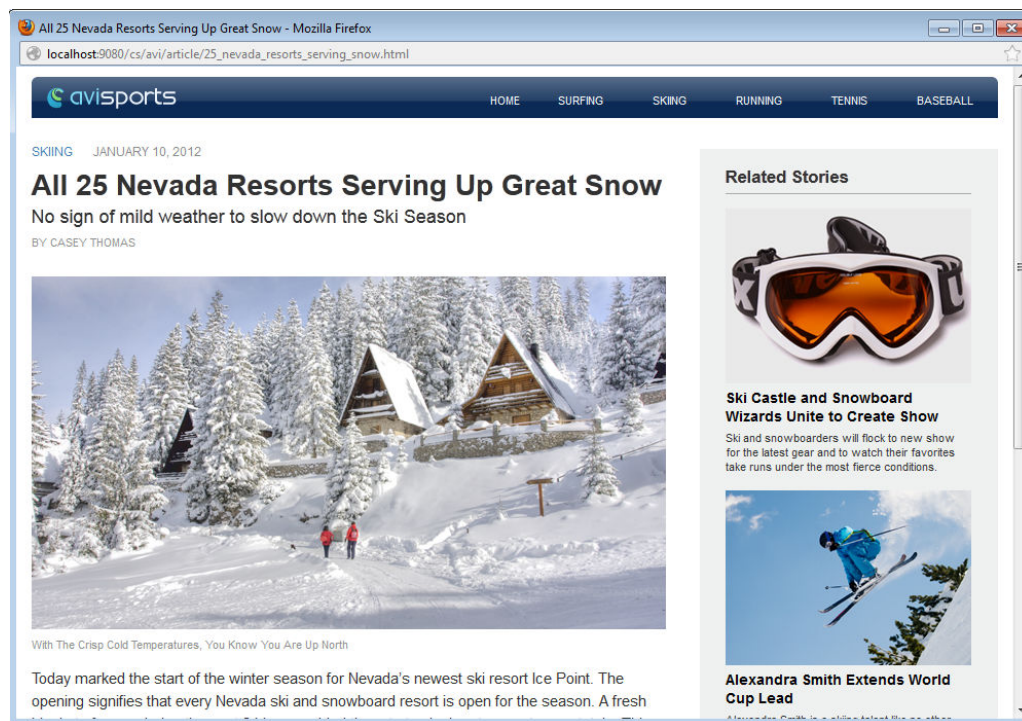
- Preview the asset with a different site wrapper. In the menu bar, select **View**, then select **Preview with Wrapper**, and then *select the wrapper with which you want to preview the asset*.

The tab refreshes and displays the preview of the asset with the wrapper you selected.

- 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 (as shown in Figure 6-40).

**Figure 6-40** Preview Asset in a New Window



## 6.7.2 Previewing Future Sites

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. If the selected date falls within the asset's start/end date range, then the asset's preview opens.

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**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 View).
  - The template for the page associated with the asset must be coded to support future preview. For more information, see your site administrator.
- 
- 

For information about previewing future sites, see the following topics:

- [About Start and End Dates](#)
- [Impact of Start and End Dates on Future Preview](#)
- [Assigning Start and End Dates](#)
- [Previewing a Site as It Will Appear at a Future Time](#)
- [Approval for Publishing](#)

#### **6.7.2.1 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 View (located on the **Metadata** section of the form).

Start and end dates affect the function of Future Preview, as discussed in this section.

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.

#### **6.7.2.2 Impact of Start and End Dates on Future Preview**

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.

When you set a start and end date range, you can use Future Preview to compare how the asset 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 appears before the item is published or after the item is no longer visible on the page.



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**Note:**

The publication date of the asset does not affect when and how long the asset's web page is accessible from the website; this is controlled by the start and end dates.

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- Neither the start nor end date is a required field:
  - An asset without both start and end dates can always be previewed, regardless of the date with which you choose to preview it.
  - An asset with an explicitly set start and end date can be previewed conditionally; that is:
    - ◆ If the asset has both a start and an end date, the asset can be previewed only when the specific date range is selected.
    - ◆ If the asset has only a start date, the asset can be previewed on all dates including and after the start date. (It never expires.)
    - ◆ If the asset has only an end date, the asset can be previewed on all dates up to and including the end date.

### 6.7.2.3 Assigning Start and End Dates

To assign start and end dates:

1. From the Contributor interface, select the site containing the asset to which you want to assign a date range.
2. Find the asset to which you are assigning a start date, or end date, or both. For instructions, see [Finding and Organizing Assets](#).
3. Edit the asset in Form View. For instructions, see [Editing Assets in Form View](#).
4. In the asset's form section selector, select **Metadata**.
5. In the **Metadata** section, set the asset's start date, or end date, or both and (optionally) time.

In the **Start Date** and **End Date** fields, select a date and time from the date picker by clicking the **Pick a date** icon next to each field (shown in [Figure 6-41](#)).

**Figure 6-41 Metadata Section of an Asset's Form**

The screenshot shows a web form with three tabs: 'Content', 'Marketing', and 'Metadata'. The 'Metadata' tab is selected. Below the tabs, the article title 'Article: FSIIAbout' is displayed. A dashed horizontal line separates the title from the form fields. The form contains the following fields:

- Description:** A text input field containing 'About FirstSiteII'.
- ID:** A text input field containing '1124813172330'.
- Filename:** An empty text input field.
- Path:** An empty text input field.
- Start Date:** A date picker field with a calendar icon to its right.
- End Date:** A date picker field with a calendar icon to its right.

**Note:**

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

For more information about using the date picker, see [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 [Previewing a Site as It Will Appear at a Future Time](#).

**6.7.2.4 Previewing a Site as It Will Appear at a Future Time**

When assets have been assigned a start date, or end date, or both, you can preview assets and the pages on which those assets are displayed as they will appear at future times of your choice.

1. From the Contributor interface, select the site containing the asset to which you assigned a start date or end date.
2. Find the asset to which you have assigned a start date or end date. For instructions, see [Finding and Organizing Assets](#).

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

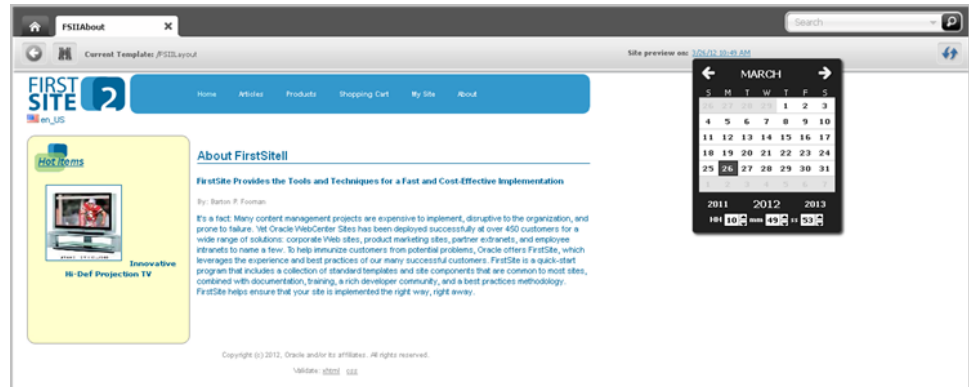
A tab opens displaying the Inspect view of the asset in either Form View or Web View.

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

The tab displays the preview of the asset as it appears on the website on the current date.

5. Preview the asset as it will appear on a future date:
  - In the asset's toolbar, click the date link to render the date picker (shown in [Figure 6-42](#)).

**Figure 6-42 Date Picker Rendered in an Asset's Preview**



- In the date picker, select a date and time. For instructions on using the date picker, see [Working with the Date Picker](#).

The preview displays the asset's web page as it will appear on the selected date.

Figure 6-43 shows the FSIIAbout asset's preview as it will look on a date in October.

**Figure 6-43 Future Preview of an Asset as it will be Displayed in October**

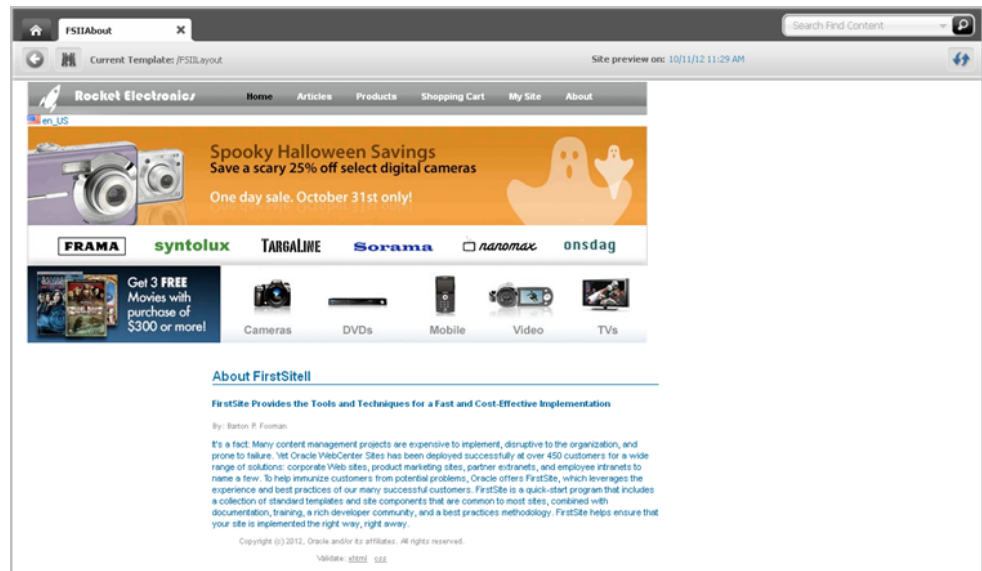
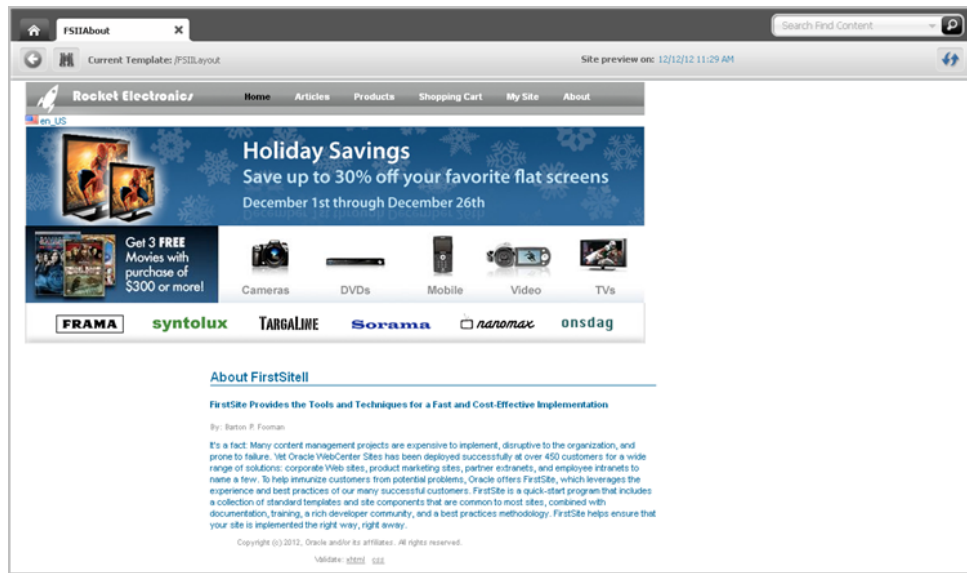


Figure 6-44 shows the FSIIAbout asset's preview as it will look on a date in December.

**Figure 6-44 Future Preview of an Asset as it will be Displayed in December**



### 6.7.2.5 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 assets published at the same time are up to date before publishing.

The start date that you set does not necessarily have to be the date on which the item gets published. However, the asset is not available 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 is published to its destination; however, the asset does not appear on the website (the asset has expired).

For more information about approving assets, see [Performing Approval Tasks](#).

## 6.8 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 View or Web View. In Form View, an association field is represented by a drag and drop field in a content entry form. In Web View, 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. From the Contributor interface, select the site containing the assets you want to associate.
2. Do one of the following:
  - Begin creating an asset:
    - For instructions on creating assets in Form View, see [Creating an Asset in Form View](#).
    - For instructions on creating assets in Web View, see [Creating an Asset in Web View](#).

- Open an existing asset for editing:
  - For instructions on editing assets in Form View, see [Editing Assets in Form View](#).
  - For instructions on editing assets in Web View, see [Editing Assets in Web View](#).

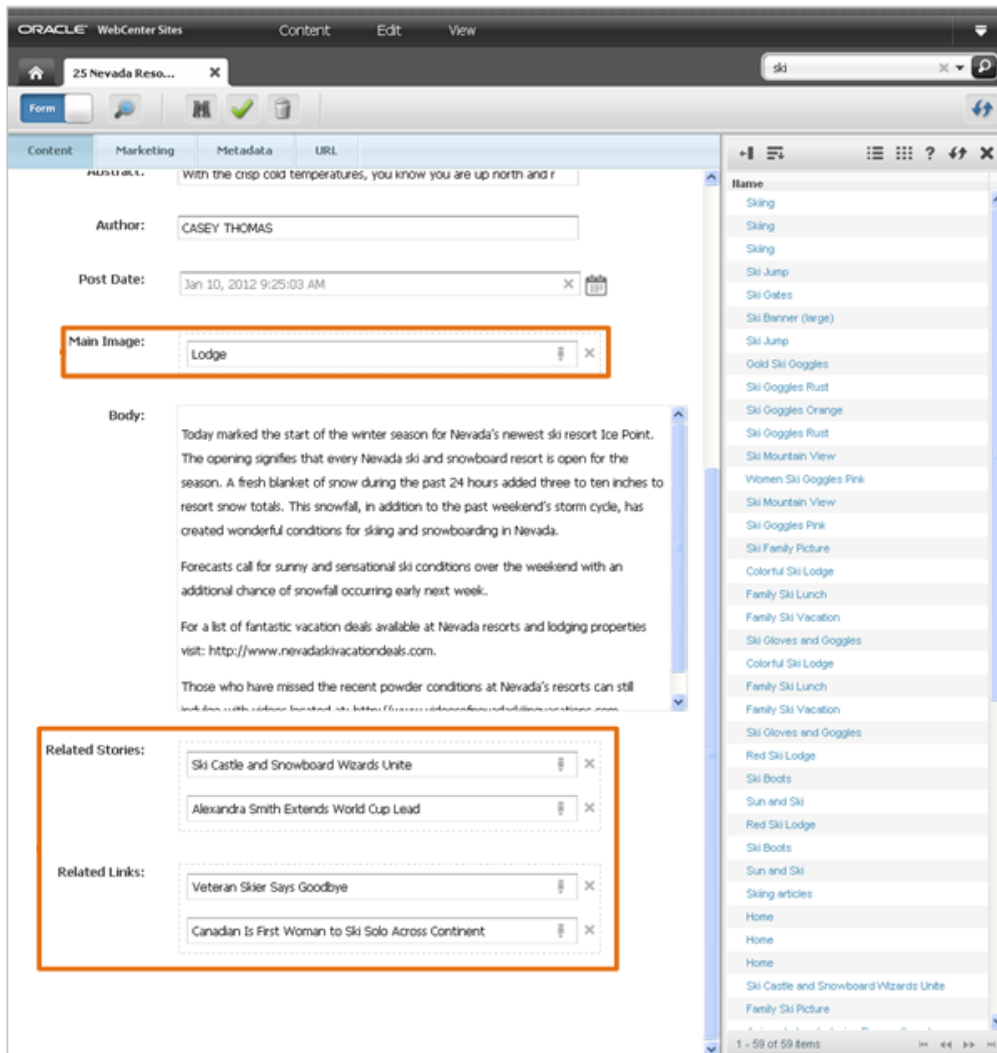
A tab opens displaying the asset's content entry form in either Form View or Web View. (In this example, we open the 25 Nevada Resorts Serving Snow Article asset.)

3. Find the asset (or assets) you want to associate. For instructions, see [Finding and Organizing Assets](#).

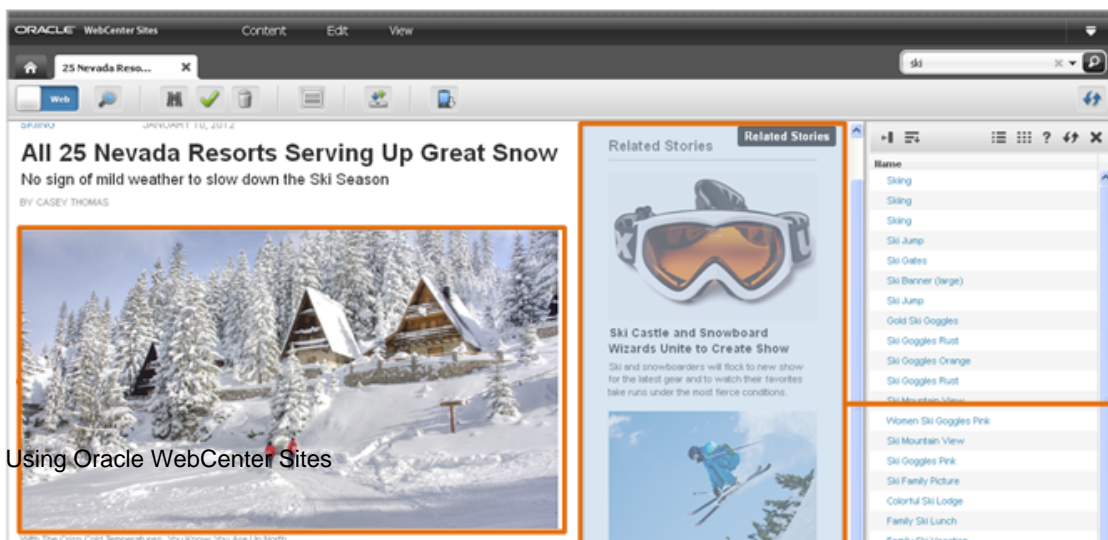
The search results list is docked to the right of the asset with which you are working. [Figure 6-45](#) shows the Edit view of the 25 Nevada Resorts Serving Snow Article asset in Form View and Web View with the search results list docked to the right of the asset.

**Figure 6-45 Article Asset Displayed in Form View and Web View (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. In the list of assets, drag and drop an asset into the association field (Form View) or slot (Web View). If this is a multi-valued association, you can associate multiple assets with the asset you are working with. For more information about association fields, see [Editing Associations](#).
5. If you are working with a multi-valued association and have associated two or more assets, arrange the associated assets as follows:

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**Note:**

The order in which the assets appear in the list (Form View) or in the slots (Web View), is the order in which they are displayed on the website.

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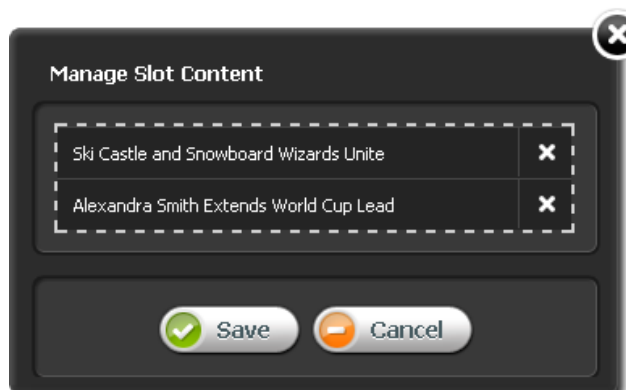


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- **If you are working in Form View**, click the name of an asset in the field and move it into the appropriate position.
- **If you are working in Web View**, move an asset to a different slot. Do the following:
  - Click the multi-valued slot to open its toolbar.
  - In the slot's toolbar, click the **Manage** icon.

The Manage Slot Content dialog (shown in [Figure 6-46](#)) opens.

**Figure 6-46** *Manage Slot Content Dialog*



- Click the name of an asset in the list and move it either up or down, then 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.

## 6.8.1 Disassociating Assets

To disassociate assets:

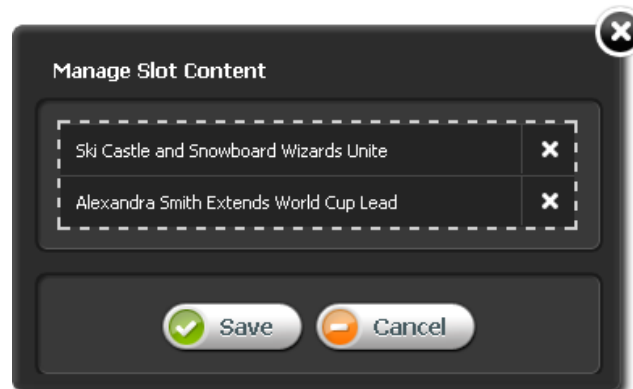
1. From the Contributor interface, select the site containing the assets you want to disassociate.

2. Find and open the asset from which you want to disassociate one or more assets. For instructions, see [Finding and Organizing Assets](#).

A tab opens displaying the Edit view of the asset in either Form View or Web View.

3. Remove an asset from the list of associated assets:
  - If you are working in Form View, 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 View and you want to remove an asset from a slot representing a single-valued association, click the slot containing the asset you want to disassociate. In the slot's toolbar, click the **X** button.
  - If you are working in Web View and you want to remove an asset from a multi-valued slot, do the following:
    - Click the multi-valued slot.  
The slot's toolbar opens.
    - In the slot's toolbar, click the **Manage** icon.  
The Manage Slot Content dialog (shown in [Figure 6-47](#)) opens.

**Figure 6-47** *Manage Slot Content Dialog*



- Click the **X** next to the asset you want to remove.
- Click **Save**.

WebCenter Sites removes the asset 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.

## 6.8.2 Assigning a Parent Asset to a Child Asset

To assign a parent asset to a child asset:



1. From the Contributor interface, select the site containing the asset you want to designate a parent asset for.
2. Do one of the following:
  - Begin creating an asset:
    - For instructions on creating assets in Form View, see [Creating an Asset in Form View](#).
    - For instructions on creating assets in Web View, see [Creating an Asset in Web View](#).
  - Edit an existing asset:
    - For instructions on editing assets in Form View, see [Editing Assets in Form View](#).
    - For instructions on editing assets in Web View, see [Editing Assets in Web View](#).

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

3. In the asset's Create or Edit view, locate the association field.

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**Note:**

If you are working in Web View, 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 must switch to Form View by clicking the **Mode** switch in the asset's toolbar.

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4. Find the parent asset you want to designate as the parent of the asset with which you are working.
  - In the navigation pane, select the **Content Tree** bar.
  - In the **Content Tree**, expand the nodes to expose the parent assets related to each node.
5. Designate the parent asset. For example, if you are working in Form View, use the drop-down list in the **Category** field to select the parent asset you want to designate as the parent of the asset you are working with.

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**Note:**

The type of field you see depends on the configurations your developers made to the asset's definition. In this example, a parent asset is being designated for an Article asset. In the avisports sample site, the field in which you designate a parent asset is a drop-down list. In the FirstSite II sample site, the field in which you designate a parent asset is a drag and drop field.

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WebCenter Sites associates the asset with the selected parent assets. The field displays the name of the associated parent asset.

6. When you are finished, click the **Save** icon on the asset's toolbar.

When you work with child assets in Form View, the attributes are shown on the Content tab as usual. Additionally, attributes that are inherited from a parent asset are shown on a separate Inherited tab. If there is more than one parent, the Inherited tab shows the attributes grouped by parent.

### 6.8.3 Working with Grouped Assets

When working with assets, you can 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.

For information about working with grouped assets, see the following topics:

- [Working with Collections](#)
- [Building a Collection](#)
- [Working with Recommendations](#)

#### 6.8.3.1 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 can 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 when 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.

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**Note:**

Collection assets can only store lists of basic assets. For flex assets, functionality similar to that of Collection assets (and much more) is provided by Recommendation assets (described later in this section).

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#### 6.8.3.2 Building a Collection

A Collection asset must exist in the site you are working with for you to build a 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. From the Contributor interface, select the site in which you want to build a collection.
2. Find the collection you want to build. See [Finding and Organizing Assets](#).
3. In the list of search results, navigate to the Collection asset you want to build, and click its name.

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

4. If the Collection asset open in Web View, switch to Form VIEW by clicking the **Mode** switch in the asset's toolbar.
5. In the asset's Inspect view (in Form View), click **Build Collection**, located next to the name of the Collection asset.

WebCenter Sites runs the query (or queries) in the collection and displays the rules, as shown in [Figure 6-48](#).

**Figure 6-48 Collection Asset's Query Results**

The screenshot shows a web interface titled "Build Collection: HelloCollection: Hello". It contains two tables. The first table, "Current HelloArticles", lists assets with columns for Rank, Remove, Name, Description, Start Date, and End Date. The second table, "Query 1: HelloQuery", lists assets with columns for Rank, Name, Locale, Modified, Start Date, and End Date. At the bottom, there are "Cancel" and "Save Changes" buttons.

Rank	Remove	Name	Description	Start Date	End Date
1	<input type="checkbox"/>	dogs	story about the DogsFromMars	-	-
2	<input type="checkbox"/>	food	story about where to eat on planet Earth	-	-
3	<input type="checkbox"/>	movies	story about movies	-	-
4	<input type="checkbox"/>	robots	story about robot combat games	-	-
5	<input type="checkbox"/>	roswell	story about Roswell, New Mexico	-	-
6	<input type="checkbox"/>	spacejunk	story about space debris	-	-
7	<input type="checkbox"/>	survey	survey for first-time visitors to planet Earth	-	-

Rank	Name	Locale	Modified	Start Date	End Date
1	dogs	🇺🇸	8/2/02 11:18 AM	-	-
2	food	🇺🇸	8/2/02 11:19 AM	-	-
3	movies	🇺🇸	8/2/02 11:19 AM	-	-
4	robots	🇺🇸	8/2/02 11:20 AM	-	-
5	roswell	🇺🇸	8/2/02 1:56 PM	-	-
6	spacejunk	🇺🇸	8/2/02 11:20 AM	-	-
7	survey	🇺🇸	8/2/02 11:21 AM	-	-
	new	🇺🇸	3/28/12 3:34 PM	-	-

6. Rank the assets by entering the appropriate number (up to three digits) in the Rank column of the table. To remove an asset from the top list, in the Remove column, select the check box next to the name of the asset you want to remove. Deleting an asset's rank number from the query list does 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 its assigned template is coded to display only five, only the first five highest-ranked assets in the collection are 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.

**6.8.3.3 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 through a Related Items recommendation, he/she sees 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 movies that share a common theme or genre to one another, 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, WebCenter Sites also shows part II. When the visitor then looks at part II, WebCenter Sites also shows 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 [Creating and Configuring Recommendations with Engage](#).

## 6.9 Linking Assets and URLs

This section contains the following topics:

- [About Linking Two Assets Directly](#)
- [Prerequisites for Linking Assets](#)
- [Creating a Link to Another Asset](#)
- [Linking Two Assets by Inclusion](#)
- [About Linking Two Assets Through an Image Asset](#)
- [Linking Through an Image from the Bookmarks Node](#)
- [Linking Assets to URLs](#)

### 6.9.1 About Linking Two Assets Directly

This section contains prerequisite steps and instructions for linking two assets, as follows:

- **Creating a link to another asset**

You may have two assets—article assets, for example—with related content you want to join by a link. Working in the main article, you would use the **Add asset link** icon on the CKEditor toolbar to insert a link to the related article. When site visitors access the main article's content, they can click the inserted 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 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.

## 6.9.2 Prerequisites for Linking Assets

Before linking assets, you must verify that they can be linked. Use this section as a checklist.

Two assets are involved in this procedure (both must be on the same site):

- The referring asset (in which you create the link to the target asset)
- The target asset (which is rendered when the link is clicked)

The prerequisites for the referring asset area s follows:

- The referring asset must display the CKEditor in the field where you will place the link. By default, CKEditor is not displayed automatically when the asset's Edit view opens. To display the CKEditor, click 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 a template listed in the asset's **Template** field. For instructions about previewing assets, see [Previewing Assets](#).)

This is the prerequisite for the target asset:

- The target asset must be previewable and readily available for linking (ensure that the target asset can be rendered by a template listed in the asset's **Template** field).

Optionally, the target asset should be readily available for linking. One way to ensure this is to place the target asset in the **Bookmarks** node, located in the **My Work** tree in the navigation pane. See [Bookmarking Assets](#) and [Finding Bookmarked Assets](#).

The prerequisites for the image asset as the target asset are as follows:

- The image asset must be previewable. Ensure that at least one template listed in the asset's **Template** field renders only the image.

---

---

**Note:** Rendering additional content (such as text) can interfere with and corrupt the linking process.

---

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- If you are including an image from the **Bookmarks** node, the image asset must be 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. See [Bookmarking Assets](#) and [Finding Bookmarked Assets](#).


## 6.9.3 Creating a Link to Another Asset


Ensure that all prerequisites in [Prerequisites for Linking Assets](#) are met.

1. Open the referring asset in its Edit view.

## 2. Insert the link to the target asset:

- In the navigation pane, click the **My Work** bar.
- In the **My Work** tree, navigate to and expand the **Bookmarks** node.  
A list of bookmarked assets opens underneath the **Bookmarks** node.
- In the CKEditor-enabled field of the referring asset, select the text you want to link. Alternatively, you can enter new text anywhere in the field and then select it.

*To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the **Maximize icon**  on the CKEditor toolbar.*

- On the CKEditor's toolbar, click the **Add asset link icon** .

The Insert Embedded Link dialog opens (as shown in [Figure 6-49](#)).

**Figure 6-49** *Insert Embedded Link Dialog*



- Select a target asset from the **Bookmarks** node in the **My Work** tree, and then drag and drop it into the field of the Insert Embedded Link dialog.

---

**Note:** If you did not bookmark the image, you can use the search feature to find the image.

---

The Insert Embedded Link dialog displays the layouts (templates) available to be assigned to the target the asset.

- Select a layout (template) to assign to the target asset.  
The layout (template) you select renders the target asset when the link is clicked.
- In the **Wrappers** field, select the wrapper with which you want to render the target asset.
- (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.
- In the **Link Text** field, verify the text you selected to be the link. If necessary, edit the text.

- 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 assigned to the target asset. Otherwise, the Template Arguments section displays the message "No arguments defined for template *Name*."

---

---

- Click **Apply**.
- Click **OK** to save the link.

The Insert Embedded Link dialog closes, and the CKEditor field displays the linked text which is underlined and surrounded by a blue border.

3. 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.

---

---

4. Save the referring asset:
  - If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.
  - In the referring asset's toolbar, click the **Save** icon.
5. Test the link by previewing the referring asset:
  - In the referring asset's toolbar, click the **Preview** icon.
  - Click the link to display the target asset.

## 6.9.4 Linking Two Assets by Inclusion


Ensure that all prerequisites in [Prerequisites for Linking Assets](#) are met.


1. Open the referring asset in its Edit view.
2. Include the target asset:



- In the navigation pane, click the **My Work** bar, and then expand the **Bookmarks** node.

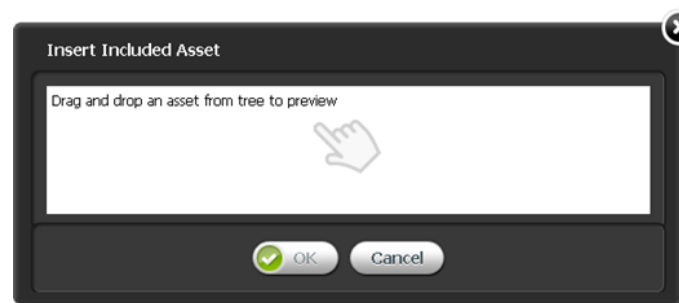
A list of bookmarked assets opens underneath the **Bookmarks** node.

- In the CKEditor-enabled 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  on the CKEditor toolbar.*

- On the CKEditor's toolbar, click the **Include Asset** icon .

The Insert Included Asset dialog opens, as shown in [Figure 6-50](#).

**Figure 6-50** *Insert Included Asset Dialog*



- Select the target asset from the **Bookmarks** node, and then drag and drop it into the field of the Insert Included Asset dialog.

---

**Note:** If you did not bookmark the image, you can use the search feature to find the image.

---

The Insert Included Asset dialog displays the layouts (templates) available to be assigned to the target asset.

- Select a layout (template) to assign to the target asset.

The layout (template) you select renders the target asset at its insertion point in the referring asset.

- 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*."

---

- Click **OK**.

The Insert Included Asset dialog closes, and the target asset's previewable content is rendered within the referring asset by the layout (template) you selected.

---

---

**Note:**

If you click the included asset, 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.

---

---

3. You can now work with the included asset as follows:
  - 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**
  - 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.
4. Save the referring asset:
  - If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.
  - In the referring asset's toolbar, click the **Save** icon.
5. Verify that the included asset is properly rendered by clicking the **Preview** icon, in the referring asset's toolbar.

## 6.9.5 About Linking Two Assets Through 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 an asset's CKEditor-enabled field, and then link the image to another (target) asset. Clicking the image renders the target asset's previewable content.

---

---

**Note:**

If you are using an image to link two assets, the image must be part of an image asset.

---

---

This section contains prerequisite steps and instructions for linking two assets through 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).

You can perform linking through 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, you can use the **Include asset** icon to include the image in the field. Use the **Add asset link** icon to link the included image to another asset.

## 6.9.6 Linking Through an Image from the Bookmarks Node

When you have met all prerequisites in [Prerequisites for Linking Assets](#), continue as described in the following sections:

- [Including the Image Asset in the Referring Asset](#)
- [Linking the Image Asset to the Target Asset](#)
- [Testing the Linked Image](#)

### 6.9.6.1 Including the Image Asset in the Referring Asset

To include the image asset in the referring asset, use the steps mentioned in [Linking Two Assets by Inclusion](#).

### 6.9.6.2 Linking the Image Asset to the Target Asset

Now that the image is rendered in the referring asset's field, create a link from the image to the target asset by using the steps mentioned in [Creating a Link to Another Asset](#).

### 6.9.6.3 Testing the Linked Image

To test the linked image:

1. If the referring asset is previewable, click the **Preview** icon, in the asset's toolbar, to preview and test the linked image.
2. Click the image to render the target asset.

## 6.9.7 Linking Assets to URLs

Using CKEditor, you can link WebCenter Sites assets to the URL of a website. 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 specify a URL) and open its Edit view:
  - In the **Search** field, enter your search criteria (if any) and then click the **magnifying glass** button.

- In the search results list, navigate to and right-click the asset you want to open. 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, to ensure against possible loss of any existing content, save the asset and then open its Edit view.

---



---

2. Navigate to the field in which you want to place the link. Click the field to ensure it displays the CKEditor.

---



---

**Note:**

By default, CKEditor is not displayed automatically when the asset's Edit view opens. Click 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 CKEditor-enabled field, select the text you want to link. Alternatively, you can type new text anywhere in the field and select it.

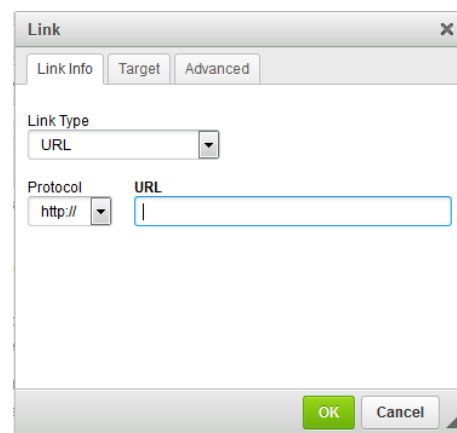
*To work more comfortably, you can maximize the CKEditor to fill your workspace. Click the*

**Maximize icon**  on the CKEditor toolbar.

4. On the CKEditor toolbar, click the **Link icon** .

The Link dialog opens, as shown in [Figure 6-51](#):

**Figure 6-51 Link Dialog**



- In the **Link Type** field, select **URL**.
- In the **URL** field, enter the URL of the website to which you want to link.
- Click **OK** to convert the selected text to a link.

The Link dialog closes, and the linked text is underlined in the field.

5. 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 text is underlined.

---

---

6. Save the referring asset:

- If you expanded the CKEditor, click the **Maximize** icon to collapse the CKEditor and view the entire asset.
- In the referring asset's toolbar, click the **Save** icon.

7. View and test the link.

- In the referring asset's toolbar, click the **Preview** icon.
- In the preview of the referring asset, click the link to open the corresponding web page in a browser window.

## 6.10 Defining Website Navigation

This section describes how to create the navigation for your website by using the **Site Tree** in the Contributor interface to place and unplace pages.

---

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**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. This chapter is for users whose site design is configured to allow them to create their website's navigation using the **Site Tree** in the Contributor interface. For information about how the navigation for your website is created, see your site developers.

---

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- [Placing and Unplacing Pages](#)
- [Creating a Website's Navigation by Copying a Navigation](#)

### 6.10.1 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. When the site plans are published, the changes you make through the tree

are applied to the websites represented by the site plans. For more information about Page assets, 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.

---

For information about placing and unplacing pages, see the following topics:

- [Placing a Page](#)
- [Unplacing a Page](#)

### 6.10.1.1 Placing a Page

This section shows you how to place a Page asset under a site plan in the **Site Tree**. You can place Pages under a site plan in the following ways:

- 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 under a site navigation, it must be approved and published to be shown on the website.

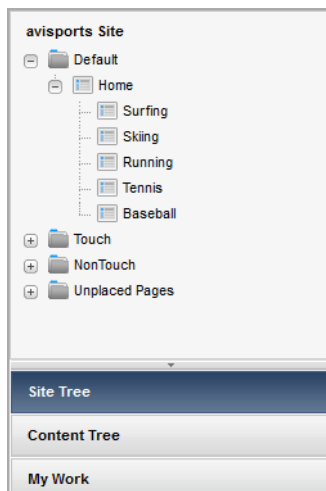
To place a Page under a site plan:

1. From the Contributor interface, select the site containing the Page asset you want to place under a site plan.
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 by clicking the plus sign displayed next to it. [Figure 6-52](#) shows the **Site Tree** for the avisports sample site.

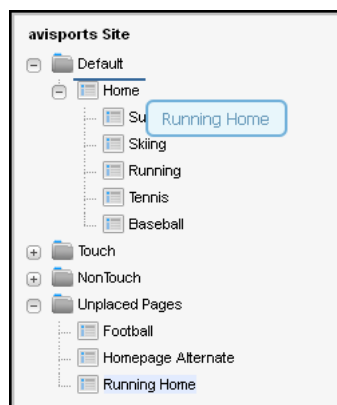
**Figure 6-52 Site Tree for the avisports Sample Site**



4. Find the Page you want to place and determine its target position in the hierarchy:
  - Find the Page you want to place:
    - If the Page is placed, navigate to the site plan under which the Page is placed.
    - If the Page is unplaced, navigate to the **Unplaced Pages** hierarchy.
  - Navigate to the 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 at the same level, and 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 6-53](#).

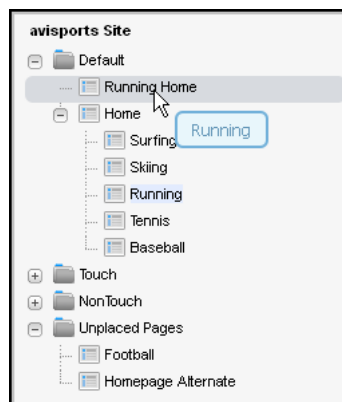
**Figure 6-53 Place a Page Asset at the Same Level as Another Page Asset**



- To place the Page as the highest-ordered sub-level of another Page, drag the selected Page over the name of the Page under which you want 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 6-54](#).

**Figure 6-54 Place a Page Asset as the Highest-Ordered Child of Another Page Asset**



To update the website with your changes to the site plan, the Page you placed must be approved and published.

### 6.10.1.2 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 must be published for it to be removed from the website.

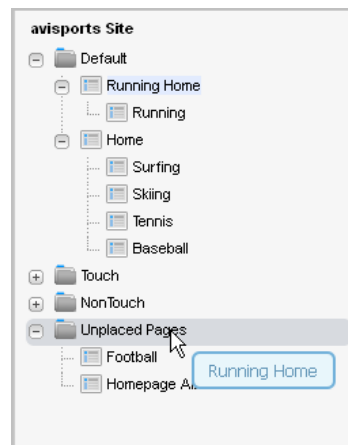
To unplace a page:

1. From the Contributor interface, select the site containing the Page asset you want to remove from a site plan.
2. In the navigation pane, click the **Site Tree** bar.

The pane displays the **Site Tree**.

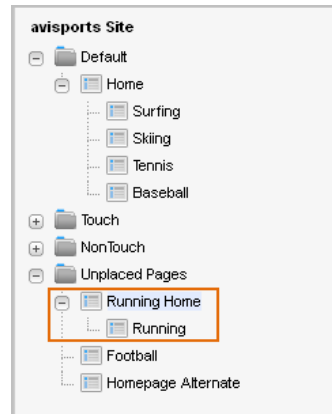
3. In the **Site Tree**, expand the site plans and **Unplaced Pages** node by clicking the plus-sign next to each node.
4. Navigate the site plan to find the Page you want to unplace.
5. Unplace the Page by dragging it over the **Unplaced Pages** node. For example, to unplace the Running Home Page, drag it over the **Unplaced Pages** node, as shown in [Figure 6-55](#).

**Figure 6-55 Unplace a Page Asset**



Releasing the Page, places it under the **Unplaced Pages** node. If the Page you unplaced contains sub-levels, its sub-level Pages are also unplaced, as shown in [Figure 6-56](#).



**Figure 6-56 Page Assets Displayed Under the Unplaced Pages Node**

You must approve and publish the unplaced Page in order for the website to be updated with your changes.

## 6.10.2 Creating a Website's Navigation by Copying a 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. When you paste the navigation under the site plan, both site plans 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.

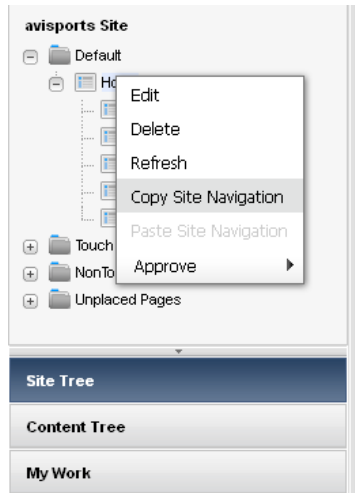
To create a website's navigation by copying a navigation:

1. From the Contributor interface, select the site containing the website navigation you want to copy.
2. In the navigation pane, click the **Site Tree** bar.

The pane displays the **Site Tree**.

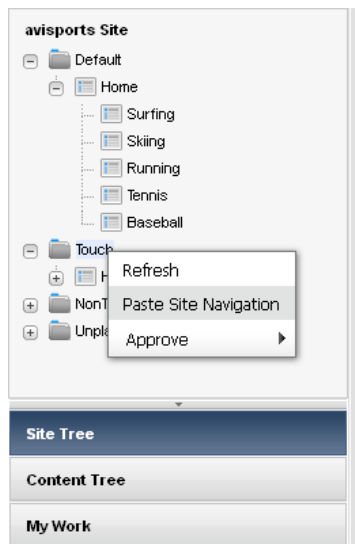
3. In the **Site Tree**, expand the site plan whose navigation (placed Pages) you want to copy by clicking the plus sign displayed next to the site plan.
4. In the expanded site plan, right-click the highest-ordered Page in the hierarchy from which you want to copy the navigation. In the context menu, select **Copy Site Navigation** (as shown in [Figure 6-57](#)).

**Figure 6-57 Copy a Site Plan's Site Navigation (Placed Pages)**



5. Navigate to the site plan under which you want to paste the copied navigation and expand its hierarchy by clicking the plus sign next to it.
6. Right-click the site plan node (or a placed Page under the site plan node) and select **Paste Site Navigation**.

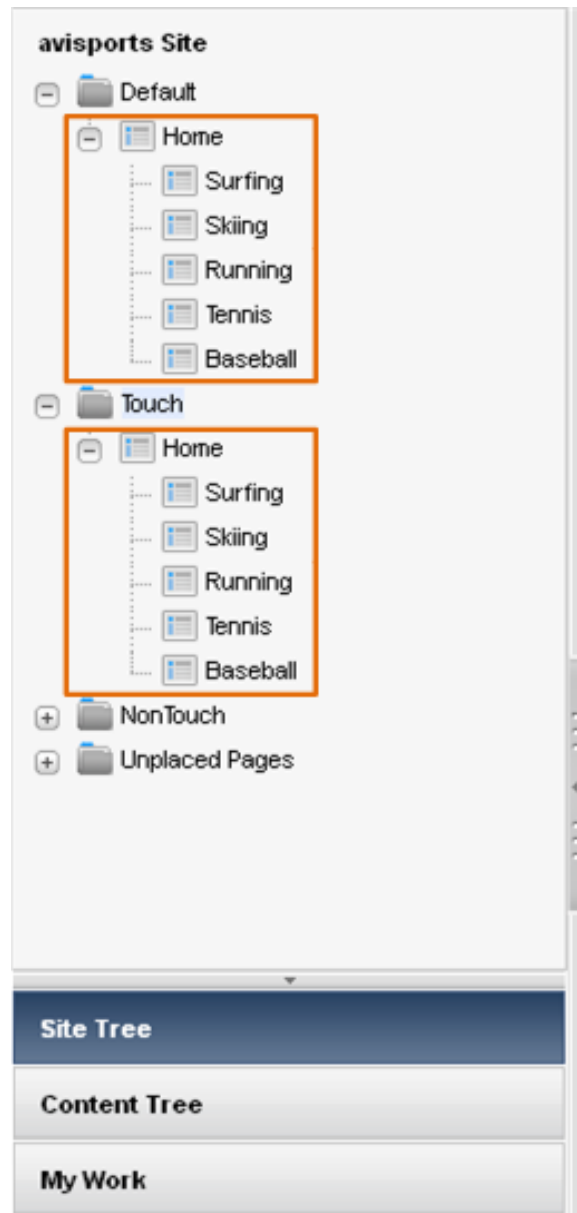
**Figure 6-58 Paste a Site Plan's Site Navigation Under Another Site Plan Node**



7. In the confirmation dialog, click **Yes**.

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). 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 6-59](#)).

**Figure 6-59** Navigation from the Default Site Plan Pasted Under the Touch Site Plan



8. Edit the Pages you pasted under the site plan. For instructions, see [Editing Assets in Form View](#) and [Editing Assets in Web View](#). If you are editing the content for a mobile site plan, see [Editing Assets in the Context of a Mobile Device](#).
9. Preview the changes you made to the content of the site plan. For instructions, see [Previewing Assets](#). To preview the content in the context of a mobile device, see [Previewing Assets in the Context of a Mobile Device](#).
10. Approve the site plan for publishing. For instructions, see [Approving a Site Navigation for Publishing](#).

## 6.11 Working with Multilingual Assets

This section includes the following topics:

- [About Working with Multilingual Assets](#)
- [Setting or Changing an Asset's Locale Designation](#)
- [Creating a Translation of an Asset](#)
- [Examining the Available Translations of an Asset](#)
- [Changing the Master Asset of a Multilingual Set](#)

### 6.11.1 About Working with Multilingual Assets

Each asset can have only one translation in each available language. For example, When 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:
  - Creates a copy of the source asset.
  - Sets the target language of the copy according to your selection.
  - 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. [Table 6-2](#) provides on how asset relationships are handled when you create translations of assets.

**Table 6-2** *Types of Asset Relationships*

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.

**Table 6-2 (Cont.) Types of Asset Relationships**

Relationship Type	Behavior
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 [Associating Assets](#).

**Note:**

Before performing the procedures in this section, note the following:

- The Contributor interface contains 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 computer must be configured for input and display of such characters.
- 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.

### 6.11.2 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.)

To create a translation of an asset that has no locale designation, follow the steps below, then continue on to [Creating a Translation of an Asset](#).

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

**Note:**

You can only assign locales that have been enabled on your site by the WebCenter Sites administrator.

To set or change an asset's locale designation:

1. From the Contributor interface, select the site containing the asset whose locale designation you want to set or change.
2. Find and open the asset. For more information about finding assets, see [Finding and Organizing Assets](#).

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

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

- If the asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.
  - In the asset's toolbar, click the **Edit** icon.
  - Switch to the **Metadata** section of the form by clicking **Metadata** in the form section selector.
  - In the **Locale** drop-down list, select a locale.
4. In the asset's toolbar, click the **Save** icon.

The asset is now assigned to the selected locale.

5. Inspect the asset. Do one of the following:
  - In the asset's toolbar, click the **Inspect** icon.
  - In the menu bar, select **Edit**, then select **Inspect**.

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

6. (Optional) If your next step is to create a translation of the asset, proceed to [Creating a Translation of an Asset](#).

### 6.11.3 Creating a Translation of an Asset

---

---

**Note:**

Keep in mind the following:

- Before you can create a translation of an asset, the asset must have a locale designation assigned to it. (The asset's locale is listed in the **Metadata** section of the 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 [Setting or Changing an Asset's Locale Designation](#).
  - 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 is automatically designated as the master asset of the multilingual set.
- 
- 

To create a translation of an asset:

1. From the Contributor interface, select the site containing the asset you want to translate.
2. Find and open the asset. For information about finding and opening assets, see [Finding and Organizing Assets](#).

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

3. If the asset opens in Web View, switch to Form View 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 6-60](#)), select the **Translate** link in the Action column next to the locale to which you want to translate the asset.

**Figure 6-60** Translations Field in the Metadata Section of an Asset's Form

The screenshot shows a web browser window titled "FSIIAbout" with a "Form" tab selected. The "Metadata" section is active, displaying the following information:

**Article: FSIIAbout**

**Description:** About FirstSiteII

**ID:** 1124813172330

**Status:** Edited

**Locale:** en\_US

**Translations:**

Name	Locale	Action
Not Available	de_DE	Translate
FSIIAbout	en_US	(Master Asset)
Not Available	es_ES	Translate
Not Available	fr_FR	Translate

**Content Definition:** FSII Article

**Referenced by:** [Show](#)

**Created:** Tuesday, August 23, 2005 8:09:48 AM EDT by firstsite

**Modified:** Tuesday, August 23, 2005 9:52:24 AM EDT by firstsite

---

**Note:**

If the **Translations** field is not displayed, stop here. You do not have the permissions to translate the asset, or your site only has one locale 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 content entry form. The tab displays the translated asset's name 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, the Choose Assignees dialog opens.

Select at least one user for each required role and click **Set Assignees**. Any of these users can complete the next step in the workflow process. For more information, see [Participating in Workflow](#).

6. In the **Name** field of the translation's content entry form, 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 (<), greater-than sign (>), and backslash (\).
- The name can contain spaces, but cannot start with a space.

7. Translate the asset as follows:

- For each field, replace the copied content with an appropriate translation. For details on filling in the fields in the form, see [Creating an Asset in Form View](#).

**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.

- 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).

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

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.

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

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

10. (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 [Using Workflow Functions](#).
11. (Optional) To see how the asset would look if it were published, preview it. For instructions, see [Previewing Assets](#). When you are finished previewing the asset, click the **Go Back** icon in the asset's toolbar.
12. Determine which associated assets have to be translated into the target language.



**Note:**

When you create a translation of an asset, the assets associated with the source asset are automatically associated with the translation asset.

- In the **Content** section of the form, navigate to the field (or fields) displaying the associated assets.
- Review the assets associated with the translated asset and determine which ones have to be translated.

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 must be translated manually.

For information about how WebCenter Sites handles asset relationships with respect to multilingual assets, see [Table 6-2](#).

- (Optional) If you determined that one or more assets associated with the translation asset have to be translated, translate those assets by repeating this procedure, then associate the translated versions with the translation asset. For instructions, see [Associating Assets](#).

#### 6.11.4 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 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. From the Contributor interface, select the site containing the asset whose translations you want to view.
2. Find and open the asset whose translations you want to examine. For instructions, see [Finding and Organizing Assets](#).

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

3. If the asset opens in Web View, switch to Form View 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, the name of the translation asset is displayed next to that language (as shown in [Figure 6-61](#)).

**Figure 6-61** Translations Field Showing the Master Asset and Translation Assets

**Article: FSIIAbout**

Description: About FirstSiteII

ID: 1124813172330

Status: Edited

Locale: en\_US

Translations:

Name	Locale	Action
FSIIAbout (de_DE)	de_DE	Make Master
FSIIAbout	en_US	(Master Asset)
FSIIAbout (es_ES)	es_ES	Make Master
Not Available	fr_FR	Translate

Content Definition: FSII Article

Referenced by: [Show](#)

Created: Tuesday, August 23, 2005 8:09:48 AM EDT by firstsite

Modified: Tuesday, August 23, 2005 9:52:24 AM EDT by firstsite

**Note:**

If the **Translations** field does not show the name of a translation asset next to a language, the asset has not yet been translated into that language. You can translate the asset by following the steps in [Creating a Translation of an Asset](#).

- (Optional) To open a specific translation of the asset for viewing, in the **Translations** field, click the name of the translation asset.

### 6.11.5 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.

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 the asset is opened in Form View.
  - 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 [Checking Out Assets](#).
- 
- 

1. From the Contributor interface, select the site containing the multilingual set whose master asset you want to change.

2. Find and open the asset whose translations you want to examine. For instructions, see [Finding and Organizing Assets](#).

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

3. If the asset opens in Web View, switch to Form View 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 Action column of the translation asset you want to make the master of the multilingual set.

The tab displays the Inspect view of the new master asset in Form View.

## 6.12 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 Admin interface) or created in the Contributor interface. A Blob (File) URL is created by your administrator in the 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. However, the administrator creates the Blob (File) URL in the Admin interface.

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 working with vanity URLs, see the following topics:

- [Creating Vanity URLs for Assets](#)
- [Viewing Vanity URLs](#)
- [Managing Vanity URLs](#)

### 6.12.1 Creating Vanity URLs for Assets

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

To create a vanity URL for an asset:

1. From the Contributor interface, select the site containing the asset for which you want to create a vanity URL.
2. Find and open the asset for which you want to create a vanity URL. Do one of the following:

- Search for and open the asset for which you want to create a vanity URL.
- If you previously bookmarked the asset, open it from the **Bookmarks** node in the **My Work** tree.

For more information about finding assets, see [Finding and Organizing Assets](#).

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

3. Access the asset's Edit view in Form View:
  - If the asset opens in Web View, switch to Form View. In the asset's toolbar, click the **Mode** switch.
  - In the asset's toolbar, click the **Edit** icon.

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

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

The **URL** section of the form opens (shown in [Figure 6-62](#)).

**Figure 6-62 URL Section of a Content Entry Form**

The screenshot shows a web browser window with the title 'Skiing'. The browser's address bar is empty. Below the browser window is a toolbar with icons for 'Form', search, save, print, mobile view, checkmark, and trash. The main content area has three tabs: 'Content', 'Metadata', and 'URL'. The 'URL' tab is selected, and the page title is 'Section Page: Skiing'. Below the title is a dashed line. The form contains four fields: 'URL:' (empty text input), 'Host:' (dropdown menu with 'http://localhost:9080/cs/avi' selected), 'Device Group:' (dropdown menu with 'Desktop' selected), and 'Template:' (dropdown menu with 'SectionLayout4' selected). Below these fields is an 'Add' button. At the bottom of the form is a table with the following data:

Action	Auto Generated	Status	Info
Not Available	Yes	200	URL: <a href="http://localhost:9080/cs/avi/avisection/skiing.html">http://localhost:9080/cs/avi/avisection/skiing.html</a> <a href="#">View More</a>

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

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

---

**Note:**

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

---

- **Host:** This field is shown only if your administrator or developers configured a root (base) URL for assets of this type in the Admin interface. Use this field to select the root (base) URL.
- **Device Group:** If your site is configured to support device groups, select a device group to designate this vanity URL as the URL to use when a visitor accesses the asset from a mobile device associated with the selected device group.  
For more information about device groups, see [Working with Mobile Device Content](#).
- **Template:** Select the layout with which to render the asset on the website.  
If your developers have defined arguments for the template you selected, those arguments are displayed to the right of the **Template** field. Select or enter values for the arguments.
- **Wrapper:** This field is shown only if your site has a wrapper. Select the wrapper for your site.

The vanity URL is added to the table at the bottom of the form (as shown in [Figure 6-63](#)).

**Figure 6-63** Vanity URL Section of the Form

The screenshot shows the 'Vanity URL Section of the Form' for 'Sküing'. The form has the following fields:

- URL:** An empty text input field with a clear button (X).
- Host:** A dropdown menu with 'http://localhost:9080/cs/avi' selected.
- Device Group:** A dropdown menu with 'Desktop' selected.
- Template:** A dropdown menu with 'SectionLayout3' selected.

Below the form is an 'Add' button. At the bottom of the form is a table with the following data:

Action	Auto Generated	Status	Info
Not Available	Yes	200	URL: http://localhost:9080/cs/avi/avisection/skiing.html <a href="#">View More</a>
<a href="#">Change Status</a>   <a href="#">Delete</a>	No	200	URL: http://localhost:9080/cs/avi/page/skiing.html <a href="#">View More</a>

6. Save the asset by doing one of the following:
    - In the asset's toolbar, click the **Save** icon.
    - In the menu bar, select **Content**, then select **Save**.
  7. Preview the asset in a new window. In the menu bar, select **View**, then select **Preview in New Window**.
- If the template that is rendering the preview of the asset matches the template selected for the vanity URL, the browser's address bar shows that the vanity URL you created is rendering the preview of the asset.
8. Approve the asset for publishing. For instructions, see [Performing Approval Tasks](#).

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

## 6.12.2 Viewing Vanity URLs

This section provides instructions for viewing 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. From the Contributor interface, select the site containing the asset whose vanity URL you want to view.
2. Find and open the asset whose vanity URL you want to view.

For more information about finding assets, see [Finding and Organizing Assets](#).

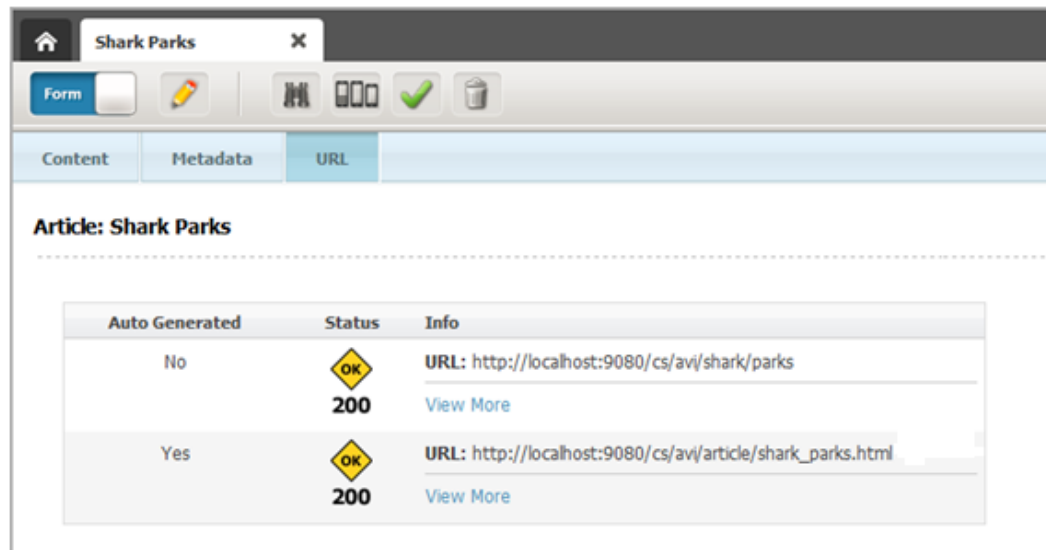
A tab opens displaying the Inspect view of the asset (in either Form View or Web View).

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

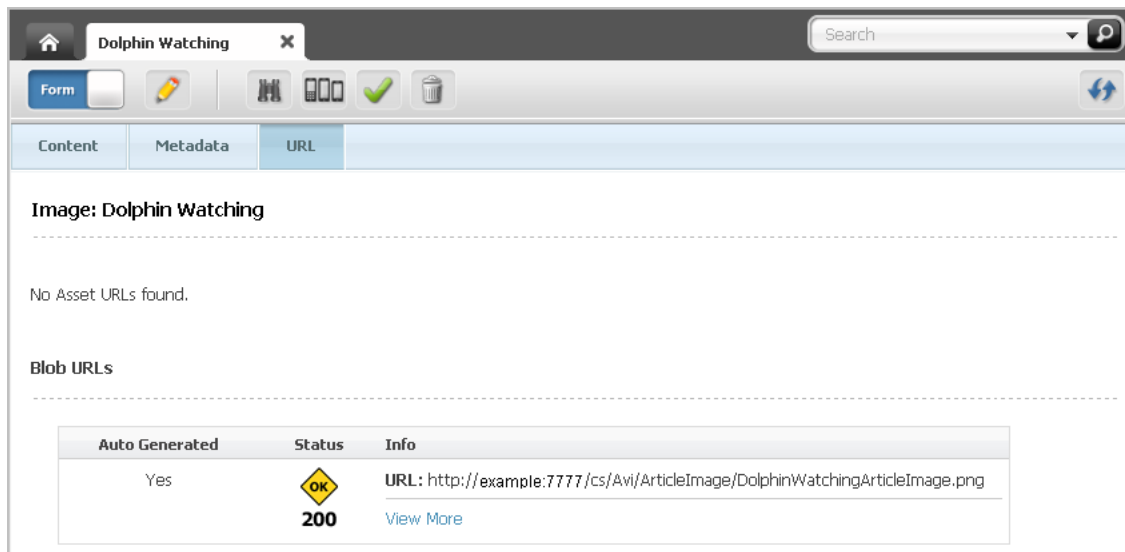
The **URL** section of the asset's form opens.

- If the asset is not assigned any vanity URLs, the **URL** section of the form shows the message "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 looks similar to [Figure 6-64](#).

**Figure 6-64** 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 looks similar to [Figure 6-65](#):

**Figure 6-65** Blob (File) URL Displayed in the URL Section of an Asset's Form

- To view the details of the URL (template, wrapper, device group, and so on) click **View More**. Click **View Less** to collapse the details of the URL.

### 6.12.3 Managing Vanity URLs

This section provides instructions for managing vanity URLs.

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**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.

---



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To manage an asset's vanity URL:

- From the Contributor interface, select the site containing the asset whose vanity URL you want to manage.
- Find and open the asset whose vanity URL you want to edit or delete.

For more information about finding assets, see [Finding and Organizing Assets](#).

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

- Access the asset's Edit view in Form View:
  - If the asset opens in Web View, switch to Form View. In the asset's toolbar, click the **Mode** switch.
  - In the asset's toolbar, click the **Edit** icon.

The tab shows the Edit view of the asset in Form View.
- In the form section selector, select **URL**.

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



5. Navigate to the URL.
6. To edit the vanity URL defined for an asset, click **Change Status** (shown in [Figure 6-66](#)) next to the URL you want to edit.

**Figure 6-66 Edit a Vanity URL**

Section Page: Skiing

URL:

Host:

Device Group:

Template:

Action	Auto Generated	Status	Info
Not Available	Yes	200	URL: http://example:7777/cs/avi/touchavisection/skiing.html <a href="#">View More</a>
<b>Change Status</b>   <a href="#">Delete</a>	No	200	URL: http://example:7777/cs/avi/Avi/skiing/page <a href="#">View More</a>

HTTP Status:

Redirect To:  http://example:7777/cs/avi/touchavisection/skiing.html

In the **HTTP Status** drop-down list, select an HTTP status:



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 are directed to the URL defined in the <b>Redirect To</b> field.
302	Temporary redirect. The visitor is redirected to a temporary web page (for example, a web page containing content that is only available for a month) defined in the <b>Redirect To</b> field.

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

Click **Apply**.

If you changed the HTTP Status of the URL, the change is reflected in the Status column of the table (as shown in [Figure 6-67](#)).

**Figure 6-67 Redirected Vanity URL**

Action	Auto Generated	Status	Info
Not Available	Yes	 <b>200</b>	URL: http://example:7777/cs/avi/touchavisection/sking.html Template: avisports/Page/SectionLayout3 Device Group: Desktop <a href="#">View Less</a>
<a href="#">Change Status</a>   <a href="#">Delete</a>	No	 <b>302</b>	URL: http://example:7777/cs/avi/sking/page Template: avisports/Page/SectionLayout3 Device Group: Desktop <a href="#">View Less</a>

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

**Note:**

If you changed the status of a URL to 302 and redirected it to the URL you want 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.

- To save the asset, do one of the following:
  - In the asset's toolbar, click the **Save** icon.
  - In the menu bar, select **Content**, then select **Save**.
- 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.
- Approve the asset for publishing. For instructions, see [Performing Approval Tasks](#).

When the asset is published, the changes you made to the asset's URL are reflected on the website.

## 6.13 About Access Permissions

For information about access permissions, see these topics:

- [About Access Permissions](#)
- [Ways to Set Access Permissions](#)
- [Setting Access Permissions from the Contributor Interface](#)

### 6.13.1 About Access Permissions

WebCenter Sites provides a system by which you can set access permissions to assets that are not part of a workflow process. For such assets, you can create policies and, within them, define which roles have permissions to perform which functions on

assets. For example, a policy for the Copy function can specify which roles are allowed to copy an asset. A different policy for the Copy function can specify which roles are denied the ability to copy an asset. For flex assets, inheritable policies can be set on parents, meaning that the policies are inherited by the children.

Functions that can be performed on assets, by default, are the following: checkout, copy, edit, delete, rollback, share, approve, and build. (For definitions of the functions, see *Oracle Fusion Middleware Administering Oracle WebCenter Sites*.)

All of the above-listed functions are defined in the `wcs_properties.json` file, as values of the property `xcelerate.authorizefunction`.

Access permissions serve a three-fold purpose:

- Extend the workflow function privileges system, making it possible to set permissions for assets when they are not in workflow.
- Introduce functions (authorize, inspect, and preview) for viewing the contents of assets that are not in workflow.
- Introduce a hierarchical permission inheritance model for assets that are not in workflow.

### 6.13.2 Ways to Set Access Permissions

Setting access permissions means creating a policy for an asset by specifying which roles can perform which functions on the asset.

There are several ways to set access permissions on assets:

- Using the Contributor interface to set permissions on individual assets. For instructions, see [Setting Access Permissions from the Contributor Interface](#).
- Using the Admin interface to set permissions on individual assets. For information, see *Oracle Fusion Middleware Administering Oracle WebCenter Sites*.
- Using the Property Management Tool, in the Admin interface, to set permissions on all assets at one time in the `wcs_properties.json` file. For information, see *Oracle Fusion Middleware Property Files Reference for Oracle WebCenter Sites*.

### 6.13.3 Setting Access Permissions from the Contributor Interface

To set access permissions from the Contributor interface:

1. In the Contributor interface, find and open the asset for which you want to set access permissions. For instructions, see [Performing a Simple Search](#).
2. In the menu bar, select **Content** and then select **Access Permissions**.

The Access Permissions form opens.

3. Select a radio box, click **View by role** or **View by function**. In this example, **View by function** is selected.

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**Note:**

In this procedure, **View by function** is used, which allows you to select a function and then specify the roles that are granted or denied permission to perform it. If you select **View by role**, the order is reversed: you will have to select the role first, then specify the functions it is granted or denied.

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4. Select a function.

When you select a function, roles that can perform the function are shown in the Inherited list box. Inherited refers to the permissions policy that the asset inherits from its parent, or its parent's parent, and so on, depending on which asset in the hierarchy has a policy.

5. Select a role (or roles) to which you will deny or grant the permission to perform the function. (To select a block or roles, **Shift-Click** the beginning and end of the block. To select non-adjacent roles, **Ctrl-Click** each role.)

6. Select either **Grant** or **Deny** to allow or forbid the role(s) to perform the function:

- **Grant** explicitly allows the selected roles to perform the selected functions on the specific asset. All other roles are denied permissions to perform the selected function on that asset unless explicitly granted permission.
- **Deny** explicitly forbids the selected roles to perform the selected function on the specific asset. All other roles are denied permission to perform the selected function on that asset unless explicitly granted permission.
- Selecting neither **Grant** nor **Deny** leaves the roles in the **Inherited** list box to indicate that access permissions are inherited.

7. Repeat steps 4 to 6 for each function and role that must be granted or denied permission to perform the selected function on the specific asset.

8. Click **Save** when finished.

Users who now access this asset can perform only the functions that their roles allow.

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## Working with Mobile Device Content

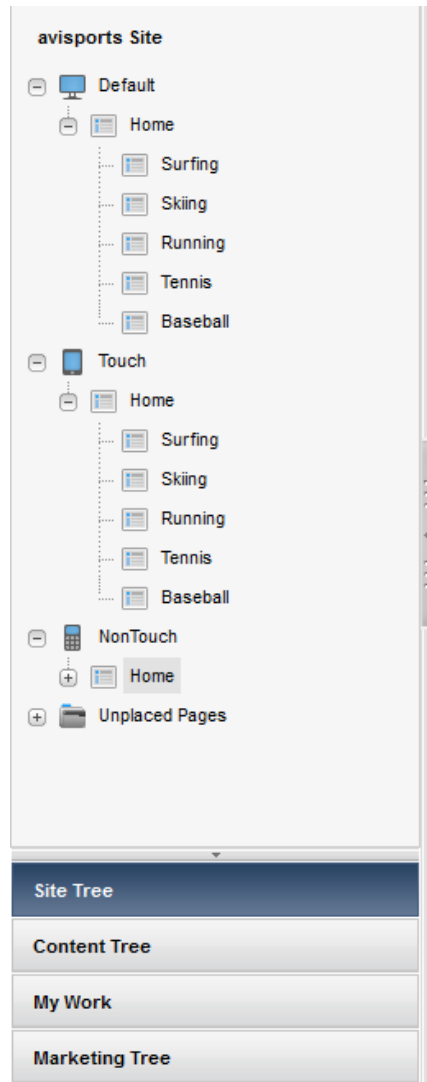
You work with the Mobility feature to create websites for mobile devices. You can create, copy, and edit the assets and site navigations of your mobile websites. You can also preview and approve your mobile websites for various devices.

For information about working with mobile device content, see these topics:

- [About Mobile Websites](#)
- [About Creating a Mobile Website](#)
- [Editing Assets in the Context of a Mobile Device](#)
- [Choosing Your Preferred Devices for Preview](#)
- [Previewing Assets in the Context of a Mobile Device](#)
- [About Approving a Mobile Site Navigation for Publishing](#)

### 7.1 About Mobile Websites

A mobile website, like your **Default** website for viewing on desktop/laptop devices, is represented by a site navigation node in the **Site Tree** of the Oracle WebCenter Sites: Contributor interface. Each node has a different icon which helps you differentiate a site's assets from those of other sites. For example, [Figure 7-1](#) shows the **Site Tree** in the avisports sample site.

**Figure 7-1 Site Navigations for the avisports Sample Site**

At the top of [Figure 7-1](#) is the **Default** site navigation node for desktop and laptop devices, which was created by default when the site was created. Below are the mobile site navigation 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 7-1](#), the **Touch** site navigation node is assigned to Device Groups for mobile touchscreen devices. The **NonTouch** site navigation node is assigned to Device Groups for mobile devices with a QWERTY keypad. Under each site navigation node is a set of placed Pages which represent the site navigation. Whereas administrators create the site navigations, contributors place the Pages. Placed Pages can be viewed and edited in the context of a mobile device.

### 7.1.1 How Do I Create Mobile Websites?

To create mobile websites, you create a mobile site navigation under a mobile site navigation node by placing Pages. You can either create content assets and Pages or copy and edit existing content assets and Pages. For more information, see [About Creating a Mobile Website](#).

## 7.1.2 How Do I Edit Mobile Websites?

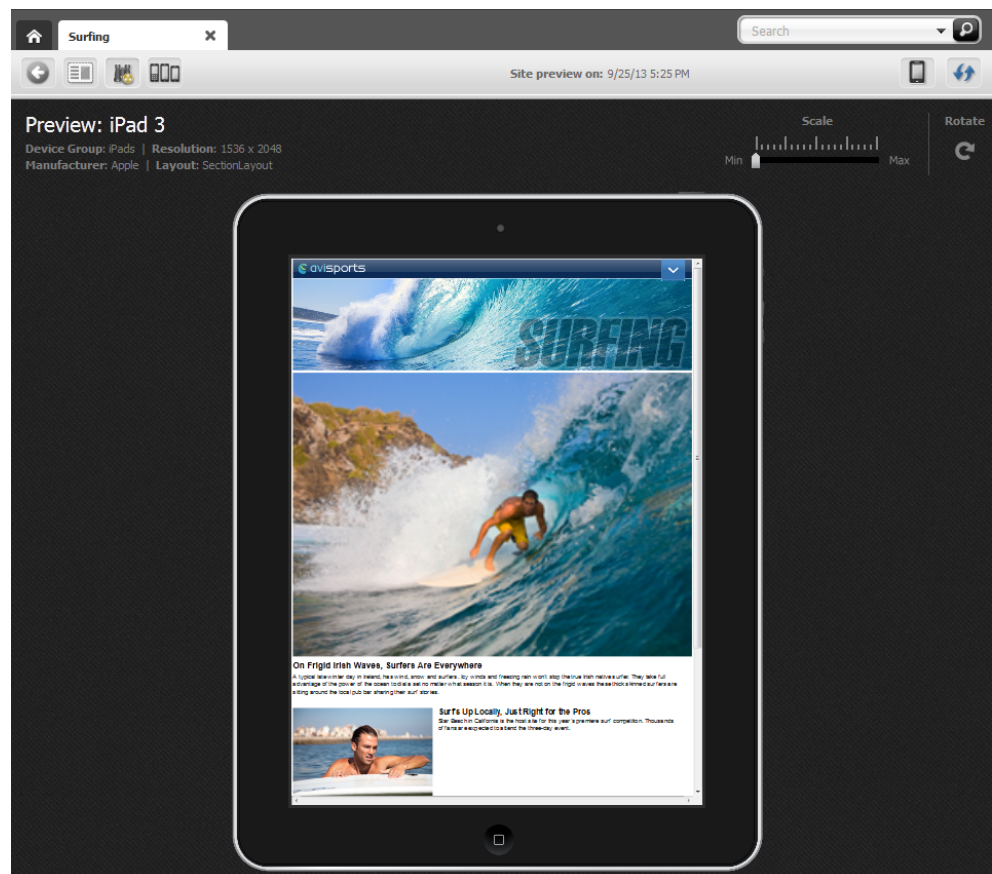
You can edit the Page and content assets of your mobile website just as you would for the **Default** website in Form View and Web View. In addition, you have the option to edit Pages and content assets in the context of a mobile device, as described in [Editing Assets in the Context of a Mobile Device](#).

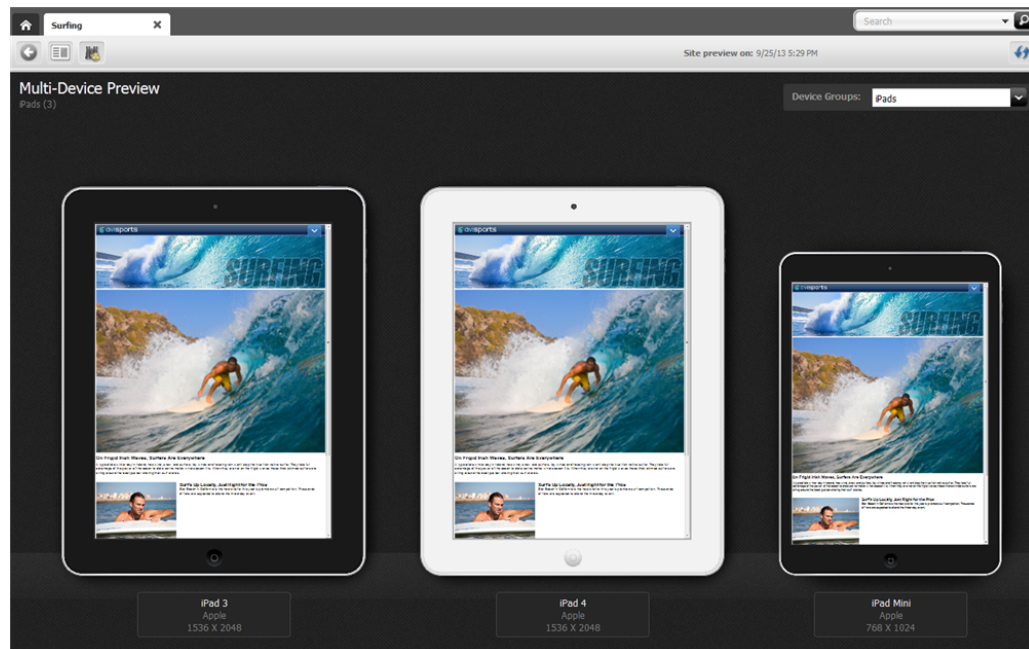
## 7.1.3 How Do I Preview Mobile Websites?

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 [Previewing Assets in the Context of a Mobile Device](#).

[Figure 7-2](#) shows the preview of the Surfing Page displayed on a single mobile device (represented by a Device asset). [Figure 7-3](#) shows the preview of the Surfing Page displayed on multiple mobile devices (associated with the same Device Group).

**Figure 7-2** Preview of a Page Asset Displayed on a Single Device



**Figure 7-3 Preview of a Page Asset Displayed on Multiple Devices**

### 7.1.4 How Do I Approve Mobile Websites for Publishing?

To make a mobile website available for publishing, you must approve its site navigation (Site Navigation 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. 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 [About Approving a Mobile Site Navigation for Publishing](#).

## 7.2 About 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 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 Pages under the mobile site navigation or copying the navigation and pasting it under another mobile site navigation.

For information about creating a mobile website, see these topics:

- [About Creating or Copying the Content for the Mobile Website](#)
- [About Creating or Copying the Navigation for the Mobile Website](#)

### 7.2.1 About Creating or Copying the Content for the Mobile Website

To create the content for your mobile website, you can:

- Create content assets and Pages. For instructions, see [Creating an Asset in Form View](#) and [Creating an Asset in Web View](#).
- 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 [Creating Assets by Copying Existing Assets](#).



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## 7.2.2 About Creating or Copying the Navigation for the Mobile Website

The navigation of your mobile website is determined by the placement of the Page assets under a site navigation in the **Site Tree** of the Contributor interface. You can either place Pages under the mobile site navigation from the **Unplaced Pages** node, or copy the navigation and paste it under the mobile site navigation. You can also create a page directly in the mobile site navigation by right-clicking any node in the site tree and selecting **New Page**. For instructions, see [Defining Website Navigation](#).

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**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. This section is for users whose site design is configured to allow them to create their website's navigation using the **Site Tree** in the Contributor interface. For information about how the navigation for your website is created, see your site developers.

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## 7.3 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 View, with one difference; your asset is shown 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.

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**Note:**

You can also edit the assets of a mobile website in Form View and Web View just as you would for an asset of your **Default** website. For instructions, see [Creating an Asset in Form View](#) and [Creating an Asset in Web View](#).

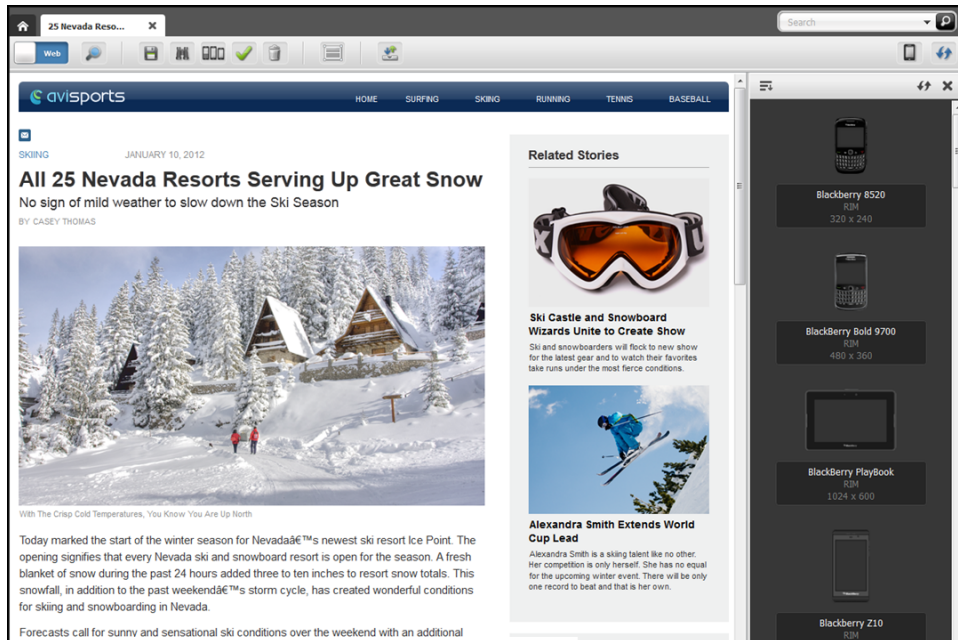
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To edit an asset in the context of a mobile device:

1. From the Contributor interface, select the site containing the mobile website whose assets you want to edit.
2. Find and open the asset you want to edit in the context of a mobile device. See [Finding and Organizing Assets](#) and [Using Placed Page Assets for Mobile Devices](#).
3. Select the device on which you want 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 7-4](#)).

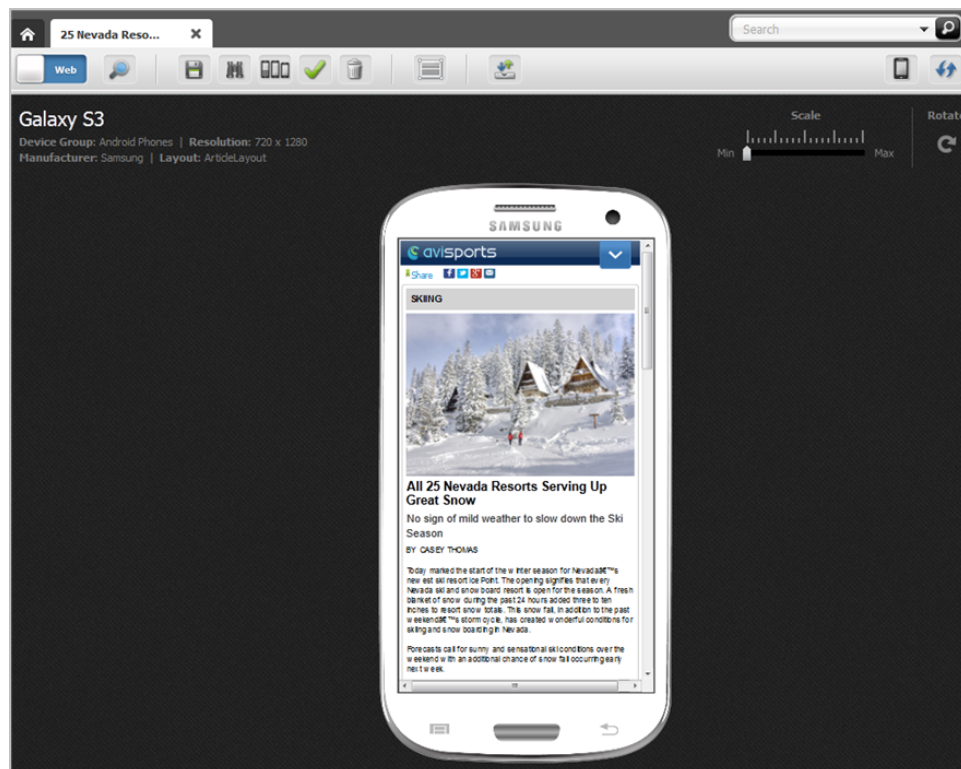
**Figure 7-4 Device Selection Panel Open to the Right of an Asset**



- b. In the device selection panel, select the device on which you want to edit the asset.

The Edit view of the asset is shown on the screen of the selected device (as shown in [Figure 7-5](#)).

**Figure 7-5 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. 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 are highlighted when you point to them.

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**Note:**

The types of editable areas you 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 [Changing Web Page Layout](#).

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For information about the different types of editable areas, see [Creating an Asset in Web View](#).

5. 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 [Working with the CKEditor](#).
6. Change the asset's web page layout. For instructions, see [Changing Web Page Layout](#).
7. Change the content layout of a slot. For instructions, see [Changing Content Layout](#).
8. Edit the asset's associations:
  - Add or replace an associated asset. For instructions, see [Adding or Replacing an Association](#).
  - Edit the content of an associated asset. For instructions, see [Editing the Content of an Associated Asset](#).
  - Remove an asset from a slot. For instructions, see [Removing Associations](#).
  - Reposition the assets displayed in a multi-valued slot. For instructions, see [Changing the Position of Content Displayed in a Multi-Valued Slot](#).
9. To 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**.
10. To 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**.
11. Preview the asset in the context of a mobile device. For instructions, see [Previewing Assets in the Context of a Mobile Device](#).

### 7.3.1 Using Placed Page Assets for Mobile Devices

Use the **Site Tree** in the navigation pane:

1. In the navigation pane, click the **Site Tree** bar.

The navigation pane displays the **Site Tree**.

2. In the **Site Tree**, expand the site navigation associated with the type of mobile device on which you want to edit the asset.
3. In the expanded site navigation, right-click the 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 navigation.

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**Note:**

When the Page (or Content) assets are opened for editing, the site navigation icon appears on the left of the asset names on the tabs. This feature is useful when several assets are opened for editing simultaneously. The site navigation icon helps you to identify to which site an asset belongs.

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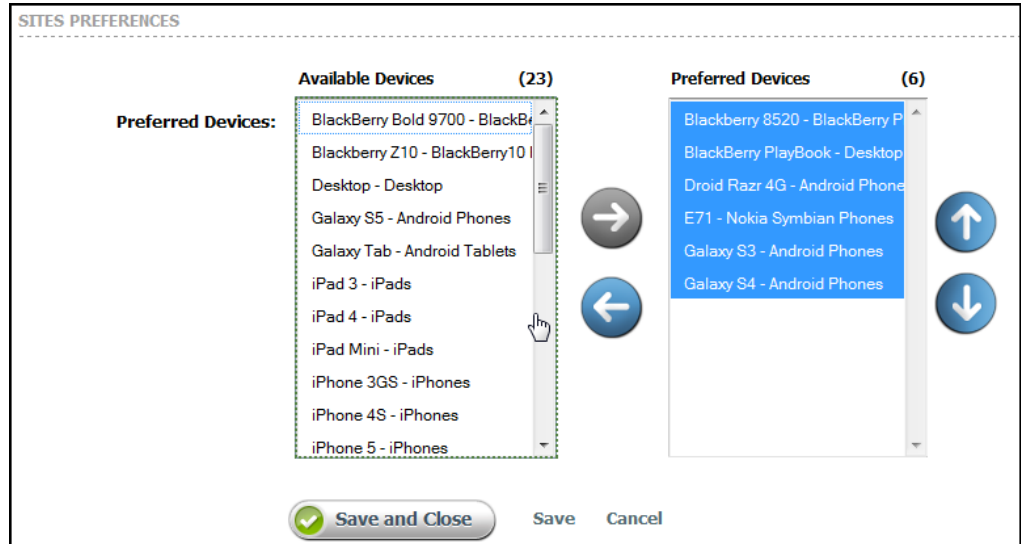
## 7.4 Choosing Your Preferred Devices for Preview

You can choose one or more devices as your preferred devices in whose context you would like to preview your site. Once you have set up your preferred devices, they are available in the **Devices** panel in the Contributor interface. You can also use your preferred devices for editing content in the context of these devices in Web View.

To choose your preferred devices:

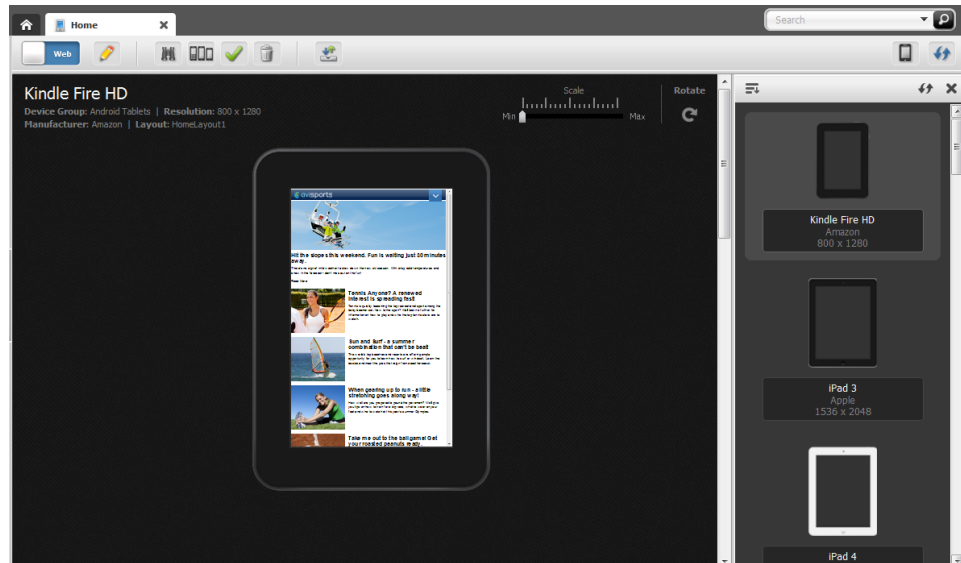
1. On the applications bar, click your user name link which is displayed on the right side just before the site drop-down field.
2. On the Edit Profile page, scroll down to the **Sites Preferences** section.
3. In the **Preferred Devices** section, from the **Available Devices** box, move your preferred devices--in whose context you would like to preview your site--to the **Preferred Devices** box. For example, see [Figure 7-6](#).

**Figure 7-6 Preferred Devices**



4. Click **Save and Close** to save your preferred devices and return to the Contributor interface.
5. In the Contributor interface, click **Show/Hide Devices** to display the **Devices** panel if it is not already displayed.
6. In the **Devices** panel, notice that the devices you preferred for your profile are displayed first, followed by rest of the devices. For example, see [Figure 7-7](#) which shows those devices in the **Devices** panel which are displayed in the **Preferred Devices** box in [Figure 7-6](#).

**Figure 7-7 Preferred Devices on the Devices Panel**



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**Note:**

Preferred devices are available in Web View as well as for single preview. You cannot use them to preview your site in multiple devices simultaneously. That is, preferred devices cannot be used with the multi-device preview functionality.

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## 7.5 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 shown 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 navigation, the Page is automatically displayed in a mobile device associated with that site navigation. For more information about accessing an asset's preview, see [Previewing Assets](#).

To preview an asset in the context of a mobile device:

1. From the Contributor interface, select the site containing the mobile website whose assets you want to preview in the context of a mobile device.
2. Find and open the asset you want to preview on a mobile device. See [Finding and Organizing Assets](#) and [Using Placed Page Assets for Mobile Devices](#).
3. In the asset's toolbar, click the **Preview** icon.

The preview of the asset opens.

4. In the asset's toolbar, click the **Show/Hide Devices** icon.

The device selection panel opens to the right of the asset.

5. In the device selection panel, navigate to and select the device on which you want to preview the asset.

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**Note:**

If you accessed the asset by using 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 navigation under which that Page is placed.

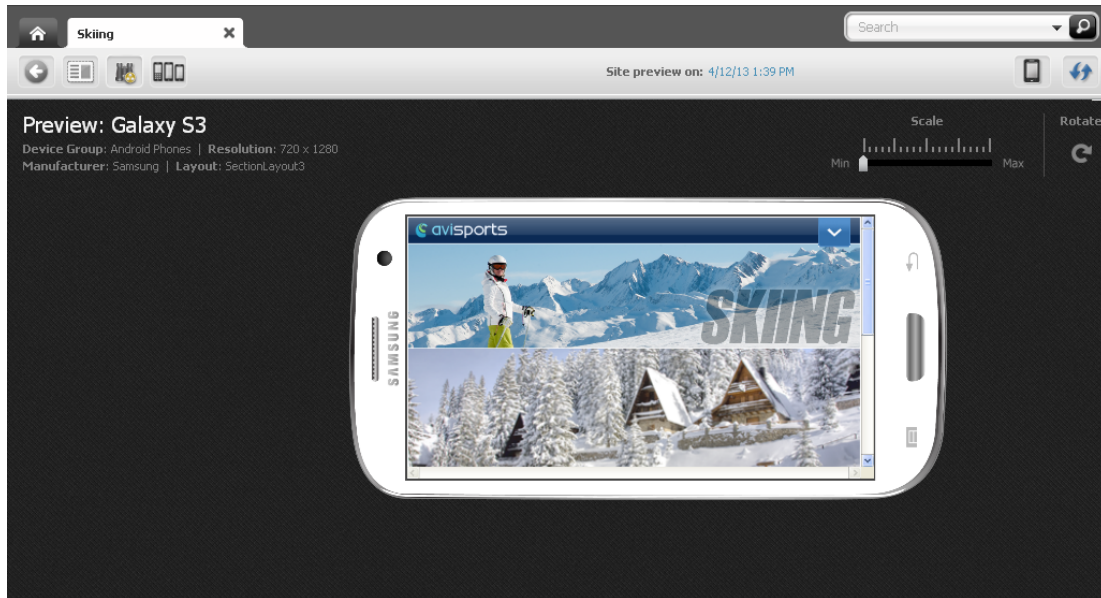
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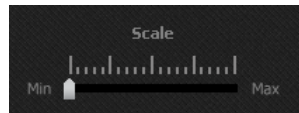
The preview of the asset is shown in the context of the device you selected.

6. (Optional) Click the **Show/Hide Devices** icon to close the device selection panel.
7. To rotate the preview, click **Rotate**.

The preview of the asset is shown on the mobile device in landscape mode (shown in [Figure 7-8](#)).

**Figure 7-8** Asset Preview Displayed on a Device in Landscape Mode

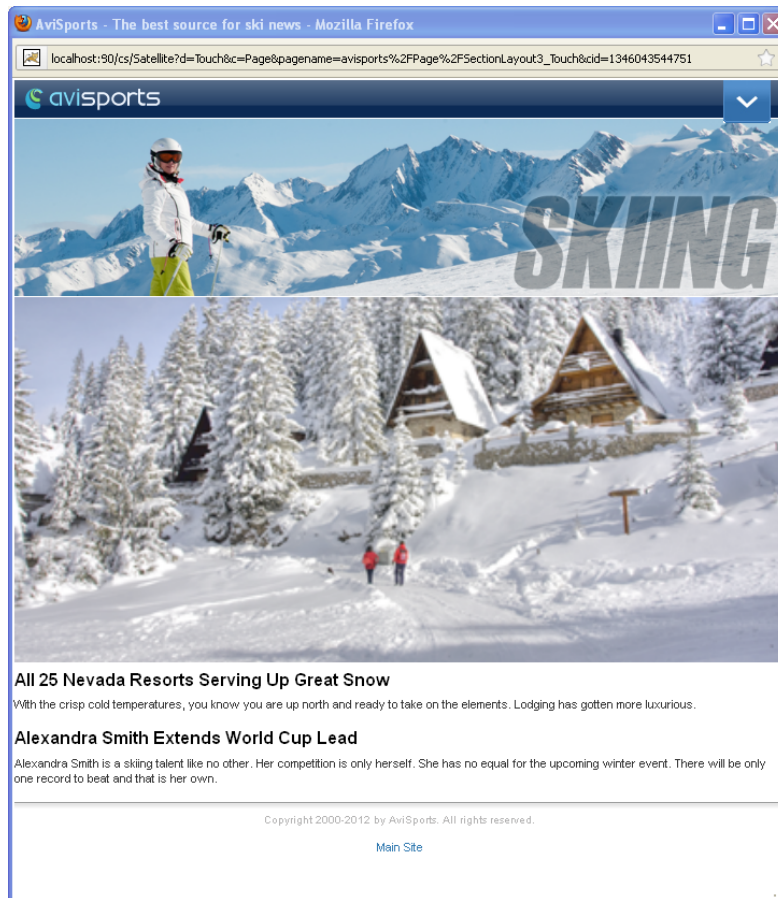
8. To preview the asset at different sizes, use the **Scale** tool (shown in [Figure 7-9](#)) to zoom into and out of the asset's preview.

**Figure 7-9** Scale Tool

9. To preview how the asset would look on the screen of a different mobile device:
  - If the device selection panel is not displayed, click the **Show/Hide Devices** icon to open it.  
The device selection panel opens to the right of the asset.
  - In the device selection panel, select a mobile device.  
The preview of the asset is shown on the screen of the selected mobile device.
10. 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 (shown in [Figure 7-10](#)). 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 shown at the exact same pixel ratio.

**Figure 7-10 Preview of an Asset Displayed in a New Browser Window**

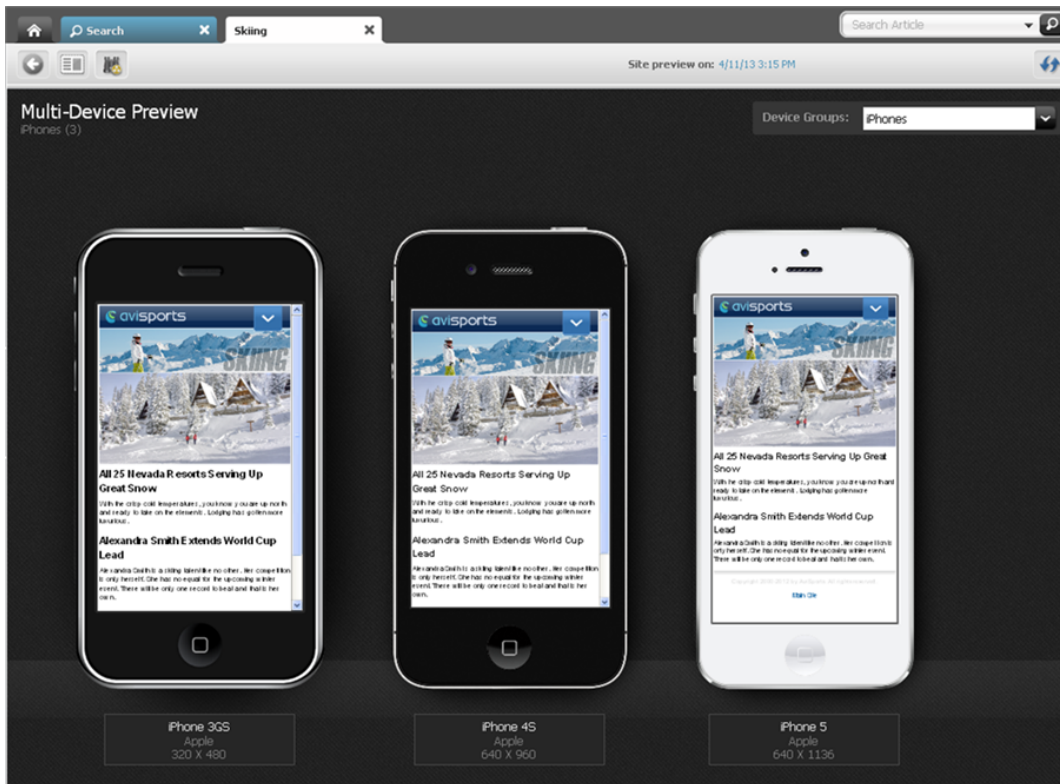


11. To preview the asset on multiple devices, either click the **Multi-Device Preview** icon in the asset's toolbar or, in the menu bar, select **View**, then select **Multi-Device Preview**.

The tab displays the Multi-Device Preview of the asset (shown in [Figure 7-11](#)).



**Figure 7-11** 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, Multi-Device Preview shows the preview of the asset in the context of all devices belonging to the same device group as that single device.

To preview the asset on the devices of a different device group, in the **Device Groups** drop-down list (shown in [Figure 7-12](#)), click the **down-arrow** icon and then select a device group.

**Figure 7-12** Device Groups Drop-Down List



The tab displays the Multi-Device Preview of the asset on the devices associated with the selected device group.

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 [Previewing Assets](#).

## 7.6 About Approving a Mobile Site Navigation for Publishing

Approving a mobile site navigation for publishing is the same as approving a site navigation for your Default website. Before a mobile website can be published, its Site Navigation 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 navigation for publishing to a management system, you must also approve the Device assets associated with that mobile site navigation. For instruction on approving a mobile site navigation, see [Approving a Site Navigation for Publishing](#).

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# Approving and Publishing Content

You can approve assets for publishing, publish individual assets on demand, participate in workflow, and track your revisions.

For information about approving and publishing content, see these topics:

- [About Approval, Publishing, Revision Tracking, and Workflow](#)
- [Performing Approval Tasks](#)
- [Using the Publishing Feature in the Contributor Interface](#)
- [Revision Tracking](#)
- [Participating in Workflow](#)

## 8.1 About Approval, Publishing, Revision Tracking, and Workflow

The goal of using WebCenter Sites is to publish content to a website where site visitors can read and interact with it. Before an asset can be published, it has to be approved for publishing. When you approve an asset, you acknowledge that the content of the asset is ready to be published. To help keep track of which assets are ready for approval, your administrator can assign them to a workflow. A workflow routes assets through a series of editorial tasks by assigning the tasks to the appropriate users at the appropriate times. For example, an asset whose workflow status is "Ready to Edit" would be assigned to an editor while an asset whose workflow status is "Ready to Approve," has been reviewed and is ready to be approved for publishing.

To further assist in the process of moving your assets from the management system to the delivery system, WebCenter Sites provides the revision tracking feature. Revision tracking is an optional feature which must be enabled by your WebCenter Sites administrator for the asset types on your site. Revision tracking enables you to track and control the changes made to your assets.

For information about approval, publishing, revision tracking, and workflow, see these topics:

- [About the Approval Process](#)
- [About the Publishing Feature in the Contributor Interface](#)
- [About Revision Tracking](#)
- [About Workflow](#)

### 8.1.1 About the Approval Process

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 View enables you to approve the primary asset (asset with which you are working). Web View 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 navigations 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.

### 8.1.1.1 Dependencies

Dependencies are conditions that determine whether an asset can be published. An asset dependency exists when the asset is associated with other 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, and the dependency relationships of those associated assets.

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**Note:**

Site navigations do not have any dependent assets during the approval process.

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For more information about how WebCenter Sites calculates asset dependencies during approval and publishing, see the publishing chapter in *Oracle Fusion Middleware Administering Oracle WebCenter Sites*.

### 8.1.1.2 Approval States

Because of the dependencies between assets, and 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.

[Table 8-1](#) lists all the possible approval states of an asset and what each state means.

**Table 8-1 Approval States**

State	Meaning
Approved	(Informational) The asset is ready to be published 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.

**Table 8-1 (Cont.) Approval States**

State	Meaning
Needs Approval	(Action required) The asset requires approval. Click <b>Approve</b> 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. When all assets are approved, they can be published.

To learn more about the approval and publishing mechanisms employed by WebCenter Sites, see *Oracle Fusion Middleware Administering Oracle WebCenter Sites*.

## 8.1.2 About the Publishing Feature in the Contributor Interface

The Publishing feature in the Contributor interface is part of the WebCenter Sites publishing system and gives WebCenter Sites users, who are assigned the Publisher role, the means to migrate individual assets from the management system to the delivery system. WebCenter Sites also provides an approval system that determines which assets can be published. An asset must be approved before it is published. For more information about the WebCenter Sites publishing system, see *Administering Oracle WebCenter Sites*. For more information about publishing assets from the Contributor interface, see [Using the Publishing Feature in the Contributor Interface](#).

## 8.1.3 About Revision Tracking

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 still have to manually check assets back in when you are done working with them.

### 8.1.3.1 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.

If you check out an asset, it cannot be approved for publishing until you check it back in.

- **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 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 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 have to manually undo the checkout.

If you delete an asset that is not 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. A deleted asset is no longer checked out to you because it no longer exists in the system.

#### 8.1.3.1.1 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 ensure you are not preventing other people from working with assets 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 have to lock.

#### 8.1.3.1.2 Functions That Automatically Checkout an Asset To You

[Table 8-2](#) describes asset management functions that check assets out automatically:

**Table 8-2 Functions that Automatically Checkout an Asset to You**

Function	Effect on Revision Control
Create	As soon as you create an 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.

#### 8.1.3.2 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 is not 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 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 (shown in [Figure 8-1](#)).

**Figure 8-1** Revision History Report Table

Versions of Article: New Article				
Version	Date	User	Comments	
 4	9/30/13 9:39 AM	fwadmin	Modified content: Added Main Image.	
 3	9/30/13 9:37 AM	fwadmin		
 2	9/30/13 9:36 AM	fwadmin		
 1	9/30/13 9:34 AM	SYSTEM		

## 8.1.4 About Workflow

The following topics describe basic workflow concepts and terminology.

- [Workflow and Assets](#)
- [States and Steps](#)
- [Users, Roles, and Participants](#)
- [Workflow Assignments](#)
- [Deadlocks](#)
- [Sample Workflow](#)

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**Note:**

In addition to the functionality described in the topics listed above, WebCenter Sites provides the following workflow functionality through the 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, before publishing.
  - **Workflow reports** – allow you to track the progression of assets and user assignments in workflow.
- 
- 

#### 8.1.4.1 Workflow and Assets

Depending on how your site is configured, assets can be assigned to a workflow either automatically (for example, when you create an 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, and 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.

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**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.

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#### 8.1.4.2 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 through 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 through multiple steps. 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, at least one role is 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 widget on your 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 start 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.

### 8.1.4.3 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 functions of a user in a CM site by granting that user 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 the asset has been assigned to the user.

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**Note:**

Because function privileges are granted to users through their roles, 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.

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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 roles 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 have the option of limiting which users can work with a particular asset by choosing the 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 option of choosing different assignees when the asset is 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 see the asset in their assignment lists, and only they can complete the assignment before the workflow process changes the state of the asset.

#### 8.1.4.4 Workflow Assignments

An assignment is an asset on which a chosen participant (an assignee) is (or is supposed to be) working. An asset is 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).

##### 8.1.4.4.1 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.

##### 8.1.4.4.2 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 widget on your dashboard) or by viewing the status of an asset and finishing your assignment using the **Workflow commands** drop-down list (accessible by selecting **View** and then selecting **Status** in the menu bar when working with the asset). If multiple participants 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 either choose a step that approves the asset for publishing, or choose 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**, if yours is not the last (or only) vote for that particular role, or step, or both. 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, if the asset has not moved to the next state.

#### 8.1.4.4.3 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 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.

#### 8.1.4.5 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 a choice of steps exists 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.

#### 8.1.4.6 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 by using 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.

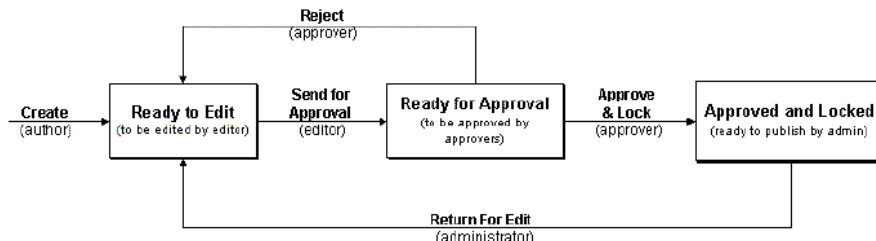
The FSII: Approval for Content sample workflow process has the following roles participating: author, editor, approver, and administrator. Each role has only a single participant (your organization most likely has more complex processes, with several users participating in each role). A participant from any of the roles can create a 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. The

administrator can also return an approved asset back to the editor for additional changes.

### 8.1.4.6.1 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 8-2](#).

**Figure 8-2 Workflow-Flowchart**



The steps and states from this workflow process are described in [Table 8-3](#):

**Table 8-3 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 if the content should be updated with additional information. The workflow administrator then uses votes to return the asset to the editor for revision.	Ready to Edit

### 8.1.4.6.2 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 logged in, so when he receives his e-mail, he accesses the Assignments widget on your 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.

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**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 [Deadlocks](#)) that has to be resolved before the asset is returned to the previous state or moved to the next one.

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Since Napoleon 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 can either be published immediately from the Contributor interface or during the next publishing session (scheduled by your administrator).

#### 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 must be re-approved before it can be re-published to the website.

## 8.2 Performing Approval Tasks

This section provides information about the approval tasks you can perform on an asset.

For information about performing approval tasks, see these topics:

- [Approving an Asset for Publishing](#)
- [Approving a Site Navigation for Publishing](#)
- [Checking an Asset's Approval Status](#)
- [Removing Assets from the Publishing Queue](#)

### 8.2.1 Approving an Asset for Publishing

The following procedure describes how to manually approve content assets and Page assets for publishing. Before approving an asset for publishing, you should preview it first.

To approve an asset for publishing:

1. From the Contributor interface, select the site containing the asset you want to approve.
2. Find and open the asset you want to approve for publishing:
  - **If the asset is currently assigned to you**, navigate to the Assignments section of your dashboard and click the name of the asset you want to approve.
  - **If the asset is not currently assigned to you**, use the **Search** feature in the Contributor interface to find the assets you want to approve. You can either approve assets directly from the search results list or click the name of the asset to open it in its Inspect view.

For instructions, see [Finding and Organizing Assets](#).

3. Select a 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 opens below the icon, select a publishing destination.
  - In the menu bar, select **Content**, then select **Approve**, and then *select a publishing destination*.

**Note:**

Keep in mind the following:

- 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 open in Form View or if you are approving assets from a search results list, the tab displays an approval table (shown in [Figure 8-3](#)) containing the details of the assets you chose to approve for the selected destination.

**Figure 8-3 Approval Table Displaying the Primary Asset's Publishing Details**

The screenshot shows a browser window with a tab titled 'Home'. The page content includes a 'Delivery' section with the text 'Assets pending approval for publish' and 'No existing publish event'. Below this is a table with one row for the asset 'Home'. The table has columns for Name, Type, Last Published, Status, Detail, and Action. Below the table are two buttons: 'Approve' and 'Approve With Dependencies'.

Name	Type	Last Published	Status	Detail	Action
Home	Page	Not yet published	Needs Approval.	Not yet approved for publish.	Approve

- If you are approving an asset that is open in Web View, the tab displays an approval 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 8-4](#)).

**Figure 8-4 Approval Table Listing All Assets Displayed in the Primary Asset's Web Page View**

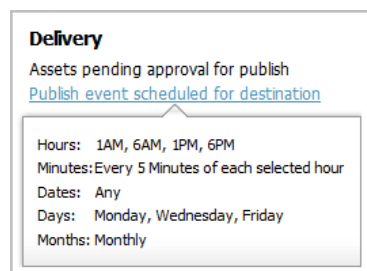
The screenshot shows a browser window with a tab titled 'Home'. The page content includes a 'Delivery' section with the text 'Assets pending approval for publish' and 'No existing publish event'. Below this is a table with six rows of assets. The table has columns for Name, Type, Last Published, Status, Detail, and Action. Below the table are two buttons: 'Approve' and 'Approve With Dependencies'.

Name	Type	Last Published	Status	Detail	Action
Home	Page	Not yet published	Needs Approval.	Not yet approved for publish.	Approve
Ski Banner (large)	Image	Not yet published	Needs Approval.	Not yet approved for publish.	Approve
Tennis Lesson	Image	Not yet published	Needs Approval.	Not yet approved for publish.	Approve
Windsurfer Sail	Image	Not yet published	Needs Approval.	Not yet approved for publish.	Approve
Female Runner Stretch	Image	Not yet published	Needs Approval.	Not yet approved for publish.	Approve
Baseball Home	Image	Not yet published	Needs Approval.	Not yet approved for publish.	Approve

Continue with the steps below to approve the assets (and their dependencies). To cancel the approval of these assets, click **Go Back**.

4. In the table, select the assets you want to approve.
  - To select all assets, click **Select All**.
  - To select only certain assets, **Ctrl**+click their rows.
5. Approve the selected assets. 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 assets 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:
  - In the Detail column, click the *n* **blocking assets** link to display a list of dependent assets.
  - 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. If the administrator configured a publishing event for the destination to which you approved the assets, you see the **Publish event schedule for destination** link, as shown in [Figure 8-5](#).

**Figure 8-5 Publish Event Scheduled for Destination Link**





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Point to the link to view a summary of the publishing event schedule for the selected destination.

## 8.2.2 Approving a Site Navigation for Publishing

From the Site Tree you can approve site navigations, the Pages placed under a site navigation, Device Groups, and Device assets. The approval of Site Navigation assets is not dependent on any other assets. However, for your site to be ready for publishing, you have to approve all Device Groups on your WebCenter Sites system, the Page assets placed under the site navigation, and the content assets associated with those Pages. If you are approving a site navigation for publishing to a management system, you must also approve all Device assets associated with that site navigation.

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**Note:**

For more information about site navigations, Device Groups, and Device assets, see [Working with Mobile Device Content](#).

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To approve a site navigation for publishing:

1. From the Contributor interface, select the site containing the site navigation you want to approve.
2. In the navigation pane, click the **Site Tree** bar.

The **Site Tree** opens in the navigation pane.

3. In the **Site Tree**, right-click the site navigation or Page you want to approve. If you are approving a placed Page, expand the site navigation under which the page is placed by clicking the plus-sign next to it.
4. In the context menu, select **Approve** and then select a publishing destination.

A tab opens displaying a table containing the publishing details of the site navigation or placed Page you chose to approve for the selected destination (as shown in [Figure 8-6](#)).

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**Note:**

If you are approving a Site Navigation asset, you see the following assets listed in the approval table:

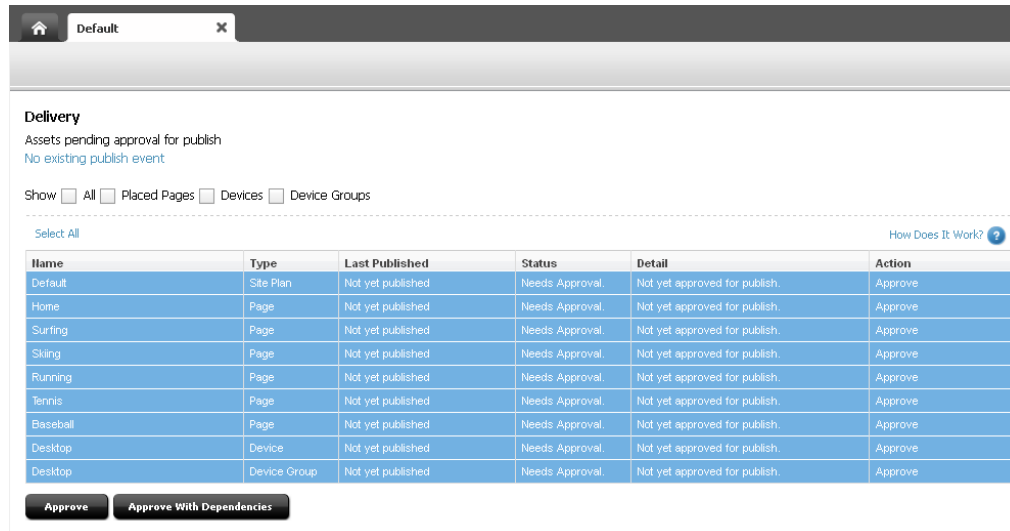
- Site Navigation asset representing the site navigation you chose to approve.
- All Device Groups on your WebCenter Sites system.  
Device assets associated with the site navigation you want to approve.
- Page assets placed under the site navigation you chose to approve.
- Content assets associated with the Pages placed under the site navigation.

If you are approving a placed Page, you see only that Page asset listed in the approval table.

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**Figure 8-6 Approval Table**



- 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 check boxes:
  - Show All** –Displays the publishing details of the site navigation along with the placed pages, device images, and device groups associated with that site navigation.
  - Placed Pages** –Displays the publishing details of only the pages placed under the site navigation you selected to approve.
  - Devices** –Displays the publishing details of only the Devices associated with the site navigation you chose to approve.

**Note:**

You are required to approve Device assets only if you are publishing the site navigation 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.

- Approve the Site Navigation 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 Site Navigation, 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".

- Click **Approve**.

The Site Navigation 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 8-7](#)).

**Figure 8-7 Approval Table: Approved Without Dependencies**

Name	Type	Last Published	Status	Detail	Action
Default	Site Plan	Not yet published	Approved	Approved and ready to publish.	Unapprove
Home	Page	Not yet published	Held	64 blocking assets	Unapprove
Surfing	Page	Not yet published	Held	20 blocking assets	Unapprove
Skiing	Page	Not yet published	Held	16 blocking assets	Unapprove
Running	Page	Not yet published	Held	18 blocking assets	Unapprove
Tennis	Page	Not yet published	Held	18 blocking assets	Unapprove
Baseball	Page	Not yet published	Held	20 blocking assets	Unapprove
Desktop	Device	Not yet published	Approved	Approved and ready to publish.	Unapprove
Desktop	Device Group	Not yet published	Approved	Approved and ready to publish.	Unapprove

To approve dependent assets, see step 7.

7. If the Page and Device Group assets you want to approve have dependencies that are preventing approval, do the following:

- 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.
- 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.

- Repeat the above steps 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.

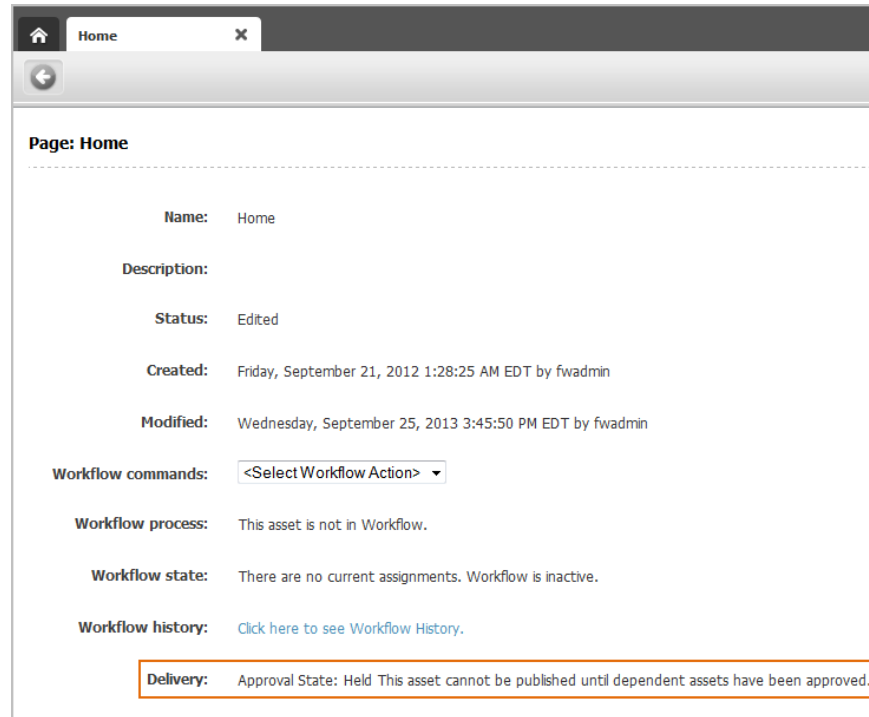
### 8.2.3 Checking an Asset's Approval Status

To check an asset's approval status:

1. From the Contributor interface, select the site containing the asset whose approval status you want to check.
2. Find and open the asset whose approval status you want to view. See [Performing a Simple Search](#) and [Opening an Asset that is Currently Assigned to You](#).
3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form, which displays information about the asset's approval status, as shown in [Figure 8-8](#).

**Figure 8-8 Publishing Status in an Asset's Status Summary Form**



4. Navigate to the name of a publishing destination and check the asset's approval state. For information about an asset's approval state, see [Approval States](#).

### 8.2.3.1 Opening an Asset that is Currently Assigned to You

To open an asset that is currently assigned to you:

1. Access your dashboard by clicking the **Home** tab.
2. Navigate to the assignments section of your dashboard.

The Assignments widget on your dashboard displays a list of all the assets that have been assigned to you.

3. In the list of assets, click the name of the asset you want to approve.

WebCenter Sites opens a tab displaying the asset's Inspect view.

### 8.2.4 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. From the Contributor interface, select the site containing the asset you want to remove from the publishing queue.
2. Find and open the asset you want to remove from the publishing queue. See [Performing a Simple Search](#) and [Opening an Asset that is Currently Assigned to You](#).
3. Unapprove the asset by doing both of the following:
  - clicking the **Approve** icon in the asset's toolbar and selecting a publishing destination from the menu that opens below the icon.
  - clicking **Unapprove** from the Action column of the approval table.

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."

## 8.3 Using the Publishing Feature in the Contributor Interface

Primarily, it is the WebCenter Sites administrator's job to publish assets from the management system to the delivery system by running either a bulk publish on all approved assets on the system or by scheduling a reoccurring publish event. If you are assigned the Publisher role, you can work with the Publishing feature in the Contributor interface. The Contributor interface's publishing feature is for quick, on-demand, publishes of one or more assets during a period where no other publishes are scheduled to run. You can publish an individual asset directly from its Approval page or publish multiple assets from the search results list.

The following topics provide information about using the publishing feature in the Contributor interface:

- [Publishing an Approved Asset](#)
- [Publishing Assets from the Search Results List](#)
- [Checking the Status of Your Publishing Sessions](#)

### 8.3.1 Publishing an Approved Asset

If you are assigned the Publisher role, you can trigger an on demand publish on an asset after you approve it. This enables your changes to immediately hit the website, instead of having to wait for a scheduled publish or for your administrator to publish it. For detailed information about WebCenter Sites publishing, see *Administering Oracle WebCenter Sites*.

To publish an approved asset from the Contributor interface:

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

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

---

---

**Note:**

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

---

---

4. Select the assets you want to publish.
5. Click **Approve and Publish**.

---

---

**Note:**

If a scheduled publish is currently in progress, the publish session is queued and will start as soon as the scheduled publish is complete.

---

---

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

A message opens confirming that the Publish is in progress.

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

The Your Publish Sessions list opens. For information about the Your Publish Sessions list, see [Checking the Status of Your Publishing Sessions](#).

### 8.3.2 Publishing Assets from the Search Results List

If you are assigned the Publisher role, and you want to publish multiple assets from the Contributor interface, you can trigger a bulk publish from the search results list.

To publish assets from the search results list:

1. From the Contributor interface, select the site containing the assets you want to publish.
2. In the **Search** field, enter search criteria pertaining to the assets you want to publish. For information about finding assets, see [Performing a Simple Search](#).
3. In the search results list, select (**Ctrl**+click) the assets you want to publish from the Contributor interface.
4. In the search results list toolbar, click the **Publish** icon.

---

---

**Note:**

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

---

---

5. In the menu that opens below the **Publish** icon, select the publishing destination.

6. In the Publish form, select the assets you want to publish and then click **Approve and Publish**.

---



---

**Note:**

If a scheduled publish is currently in progress, the publish session is queued and will start as soon as the scheduled publish is complete.

---



---

A dialog box opens with the message “Are you sure you want to publish this list?”

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

A message bar opens confirming that the Publish is in progress.

8. To check the status of your publishing session, click **Check Status** in the message bar.

The Your Publish Session list opens. For information about the Your Publish Session list, see [Checking the Status of Your Publishing Sessions](#).

### 8.3.3 Checking the Status of Your Publishing Sessions

After you have published at least one asset with the publish feature in the Contributor interface, you can check the status of that publish session, and any other publish sessions you ran from the Contributor interface since the last time the administrator cleared the publish history console from the Admin interface.

To view your publish history:

1. Log in to WebCenter Sites, select the site on which you have published an asset from the Contributor interface, and then select the **Contributor** interface.
2. In the menu bar, select **View** and then select **Publishing**.

The Your Publish Sessions list opens.

3. In the Your Publish Sessions list, view the information provided about the assets you have published from the Contributor interface:
  - **Name** column: Lists the name of each asset you published from the Contributor interface.
  - **Target** column: Shows the name of the publish destination to which you published the asset.
  - **Status** column: Shows whether the asset published successfully. If the publish session failed, the **Send Mail** link is displayed next to the publish status. Click the **Send Mail** link to send the failed publish status to a WebCenter Sites user.
  - **Queued on** column: Shows the date and time the user clicked the **Approve and Publish** button.
  - **Started on** column: Shows the date and time WebCenter Sites started the publishing session.
  - **Duration** column: Provides information about how long it took to publish the asset.

4. In the **Name** column, find the asset whose publish status you want to view.
5. In the **Status** column, you will see one of the following status messages:
  - **Failed** (Send Mail): Indicates that the asset was not successfully published to the website. Click the **Send Mail** link to email the asset's failed publish status to a WebCenter Sites administrator.
  - **Successful**: Indicates that the asset was successfully updated on the website.

## 8.4 Revision Tracking

This section describes revision tracking and the procedures used to track assets, illustrated with examples from the avisports sample site. Revision tracking is an optional feature which 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 users who worked with the asset.
- Restore (roll back) an asset to a previous version.

This chapter includes the following sections:

- [About Revision Tracking](#)
- [Checking Out Assets](#)
- [Examining Your Checkouts](#)
- [Undoing a Checkout](#)
- [Checking In Assets](#)
- [Examining Revision History](#)
- [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.

---

---

### 8.4.1 About Revision Tracking

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 still have to manually check assets back in when you are done working with them.



## 8.4.2 Checking Out Assets

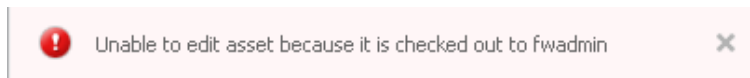
This section shows you how to manually check out an asset displayed in Form View and Web View.

---

---

**Note:**

If the asset is checked out to another user, when you try to edit the asset or check the asset out, you receive an error message like the one below:



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---

For information about checking out assets, see these topics:

- [Checking Out an Asset in Form View](#)
- [Checking Out an Asset in Web View](#)

### 8.4.2.1 Checking Out an Asset in Form View

To check out an asset in form View:

1. From the Contributor interface, select the site containing the asset you want to check out.
2. Find the asset you want to check out. For instructions on finding assets, see [Finding and Organizing Assets](#).

A tab opens displaying the results of your search.

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

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

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

WebCenter Sites checks the asset out to you.

### 8.4.2.2 Checking Out an Asset in Web View

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

1. From the Contributor interface, select the site containing the asset you want to check out.
2. Find the asset you want to check out. For instructions on finding assets, see [Finding and Organizing Assets](#).

A tab opens displaying the results of your search.

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

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

4. If the asset opens in Form View, click the **Mode** switch on the asset's toolbar to switch to Web View.
5. In the asset's toolbar, click the Checkin/Checkout icon.

The tab displays the Asset to be checked in table (shown in [Figure 8-9](#)). This table contains revision tracking details about the primary asset (asset you opened in Web View) and all of its associated assets (assets displayed in the primary asset's web page view).

**Figure 8-9 Assets to be checked in Table**

Name	Type	Version	Comment	Status	Detail	Action
New Article	Article	4		Not Checked Out		Checkout
Sun and Ski	Image	0		Not Checked Out		Checkout
25 Nevada Resorts Serving Snow	Article	0		Not Checked Out		Checkout
Ski Castle and Snowboard Wizards Unite	Article	0		Not Checked Out		Checkout
Cold Snap Back on the Scene	Article	0		Not Checked Out		Checkout
Grip Waxing Your Cross-Country Skis	Article	0		Not Checked Out		Checkout
Veteran Skier Says Goodbye	Article	0		Not Checked Out		Checkout

Buttons: **Checkout** **Undo Checkout** **Checkin**

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

---

**Note:**

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

---

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

WebCenter Sites checks the assets out to you.

### 8.4.3 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 the assets currently checked out to you:

1. From the Contributor interface, select the site containing the assets you have checked out.
2. Access your dashboard by clicking the **Home** tab.

3. Navigate to the Checkouts widget on your dashboard.

The Checkouts widget on your dashboard (shown in [Figure 8-10](#)) lists all of the assets that are currently checked out to you.

**Figure 8-10 Checkouts Widget**

Asset Name	Asset Type	Days Checked out
<a href="#">25 Nevada Resorts Serving Snow</a>	Article	Today
<a href="#">Cold Snap Back on the Scene</a>	Article	Today
<a href="#">Grip Waxing Your Cross-Country Skis</a>	Article	Today
<a href="#">New Article</a>	Article	Today
<a href="#">Ski Castle and Snowboard Wizards Unite</a>	Article	Today
<a href="#">Sun and Ski</a>	Image	Today
<a href="#">Veteran Skier Says Goodbye</a>	Article	Today

Checkin

4. To open an asset, click its name in the list.

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

## 8.4.4 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.

For information about undoing a checkout, see these topics:

- [Undoing the Checkout of an Asset Displayed in Form View](#)
- [Undoing the Checkout of an Asset Displayed in Web View](#)

### 8.4.4.1 Undoing the Checkout of an Asset Displayed in Form View

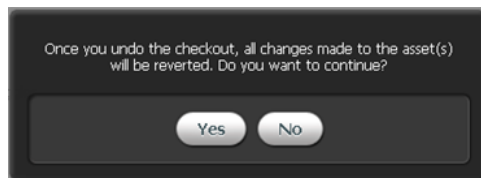
To undo the checkout of an asset displayed in form View:

1. From the Contributor interface, select the site containing the checked out asset.
2. Navigate to the Checkouts widget on your dashboard (located in the **Home** tab), and click the asset's name.

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

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

The Undo Checkout dialog opens (shown in [Figure 8-11](#)).

**Figure 8-11 Undo Checkout Dialog**

5. In the Undo Checkout dialog, click **Yes**.

WebCenter Sites undoes the checkout of the asset.

#### 8.4.4.2 Undoing the Checkout of an Asset Displayed in Web View

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

1. From the Contributor interface, select the site containing the checked out asset.
2. Navigate to the Checkouts widget on your dashboard (located in the **Home** tab) and click the asset's name.

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

3. If the asset opens in Form View, click the **Mode** switch on the asset's toolbar to switch to Web View.
4. In the asset's toolbar, click the **Checkin/Checkout** icon.

The tab displays the Asset to be checked in table (shown in [Figure 8-12](#)) which shows revision tracking details about the primary asset (asset you opened in Web View) and all of its associated assets (assets displayed in the primary asset's web page view).

**Figure 8-12 Asset to be checked in Table for an Asset Displayed in Web View**

Asset to be checked in						
Select All						How Does It Work? ?
Name	Type	Version	Comment	Status	Detail	Action
New Article	Article	4		Checked out	Version 4 - Locked by: You	Checkin
Sun and Ski	Image	1		Checked out	Version 1 - Locked by: You	Checkin
25 Nevada Resorts Serving Snow	Article	1		Checked out	Version 1 - Locked by: You	Checkin
Ski Castle and Snowboard Wizards Unite	Article	1		Checked out	Version 1 - Locked by: You	Checkin
Cold Snap Back on the Scene	Article	1		Checked out	Version 1 - Locked by: You	Checkin
Grip Waxing Your Cross-Country Skis	Article	1		Checked out	Version 1 - Locked by: You	Checkin
Veteran Skier Says Goodbye	Article	1		Checked out	Version 1 - Locked by: You	Checkin

Checkout   Undo Checkout   Checkin

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

---



---

**Note:**

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

---



---

5. In the revision tracking detail table, select (**Ctrl**+click) the assets whose checkouts you want to undo and then click the **Undo Checkout** button.

WebCenter Sites undoes the checkouts of the selected assets.

## 8.4.5 Checking In Assets

This section shows you how to check in an asset displayed in Form View and Web View. 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.

For information about checking in assets, see these topics:

- [Checking In an Asset Displayed in Form View](#)
- [Checking In an Asset Displayed in Web View](#)

### 8.4.5.1 Checking In an Asset Displayed in Form View

To check in an asset displayed in form View:

1. From the Contributor interface, select the site containing the asset you want to check in.
2. Navigate to the Checkouts widget on your dashboard (located in the **Home** tab), and click the asset's name.

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

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

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

5. Ensure the row containing the asset is selected, then click the **Checkin** button.
6. (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 applies to all assets you are checking in.
7. (Optional) To create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.

8. Click **Checkin**.

WebCenter Sites checks the asset in to the database.

### 8.4.5.2 Checking In an Asset Displayed in Web View

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

1. From the Contributor interface, select the site containing the asset you want to check in.
2. Navigate to the Checkouts widget on your dashboard (located in the Home tab), and click the asset's name.

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

3. If the asset opens in Form View, click the **Mode** switch on the asset's toolbar to switch to Web View.
4. In the asset's toolbar, click the **Checkin/Checkout** icon.

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

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

---

**Note:**

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

---

5. In the revision tracking detail table, select (**Ctrl**+click) the assets you want to check in and then click the **Checkin** button. You can also check assets in one at a time by clicking the **Checkin** link in the Action column of the asset's row.
6. (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 applies to all assets you are checking in.
7. (Optional) To create a new version of the asset and then continue working on the new version, select the **Keep Checked Out** box.
8. Click **Checkin**.

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

## 8.4.6 Examining Revision History

To examine revision history:

1. From the Contributor interface, select the site containing the asset whose revision history you want to view.
2. Find and open the asset whose revision history you want to view:
  - If the asset is not currently checked out to you, use the search feature in the Contributor interface to find and open the asset. For instructions, see [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 widget on your dashboard and click the asset's name.

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

3. In the menu bar, select **Edit, Version**, and then select **Show versions**.

---

---

**Note:**

If the asset is displayed in Form View, you can click the **Show versions** icon to view the asset's revision history.

---

---

The tab displays the asset's Revision History Report.

4. 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 View).

### 8.4.7 Reverting to a Previous Version (Rollback)

This section shows you how to roll an asset back to a previous version.

---

---

**Note:**

You cannot revert to a previous version of an asset if:

- Revision tracking is not enabled for the asset type.
- The asset is 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.

---

---

To roll back an asset:

1. From the Contributor interface, select the site containing the asset you want to rollback to a previous version.
2. Find the asset you want to roll back to a previous version and open it:
  - If the asset is not currently checked out to you, use the **Search** field to find the asset and then open it from the search results list. For instructions, see [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 widget on your dashboard and click the asset's name.

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

3. In the menu bar, select **Edit, Version**, and then select **Rollback**.

---

---

**Note:**

If the asset is displayed in Form View, you can click the **Rollback** icon to roll back to a previous version of the asset.

---

---

The tab displays the Rollback form (as shown in [Figure 8-13](#)) containing all the versions of the asset.

**Figure 8-13 Rollback Form**

**Rollback Article: New Article**

---

Rollback	Version	Date	User	Comments
<input type="radio"/>	5	9/30/13 10:00 AM	fwadmin	
<input type="radio"/>	4	9/30/13 9:39 AM	fwadmin	Modified content: Added Main Image.
<input type="radio"/>	3	9/30/13 9:37 AM	fwadmin	
<input type="radio"/>	2	9/30/13 9:36 AM	fwadmin	
<input type="radio"/>	1	9/30/13 9:34 AM	SYSTEM	

Select the version that you want to roll back to and then click Rollback.

4. In the Rollback column, select the radio button next to the version of the asset to which you want to roll back.
5. 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.

## 8.5 Participating in Workflow

This section describes workflow concepts and procedures on how to perform specific tasks related to workflow.

For information about participating in workflow, see these topics:

- [About Workflow](#)
- [Sample Workflow](#)
- [Viewing Your Assignments](#)
- [Using Workflow Functions](#)

### 8.5.1 About Workflow

The following topics describe basic workflow concepts and terminology.

- [Workflow and Assets](#)
- [States and Steps](#)
- [Users, Roles, and Participants](#)
- [Workflow Assignments](#)
- [Deadlocks](#)
- [Sample Workflow](#)



---

**Note:**

In addition to the functionality described in the topics listed above, WebCenter Sites provides the following workflow functionality through the 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, before publishing.
  - **Workflow reports** – allow you to track the progression of assets and user assignments in workflow.
- 

## 8.5.2 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 by using 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 most likely has more complex processes, with several users participating in each role). A participant from any of the roles can create a 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. The administrator can also return an approved asset back to the editor for additional changes.

## 8.5.3 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. From the Contributor interface, select the site containing your workflow assignments.
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 8-14 Assignments Widget**

Asset Name	Action to Take	Assigned by	Due (Days)
25 Nevada Resort...	Make sure that the picture associa...	Tina	Past Due
Alexandra Smith E...	Please take one last look at the im...	Sally	Past Due
Behind the Hype o...	Please publish article.	Sally	Past Due
Fit for Tennis, Fit f...	Please add an image to this article.	Tina	Past Due
Johnny Hills Optimi...	Ready to publish.	Sally	Past Due
Karen Baker Susp...	Please review and send to publish.	Sally	Past Due
Lacy James wins ...	Article is too short and is not as p...	Tina	Past Due
Lindemeyer Anno...	Please review and send to Editor f...	Sally	Past Due
Nick Brennan frac...	Ready for your review. Make sure...	Bill	Past Due
Paul North wins C...	Tina liked this article. Please revie...	Sally	Past Due

Finish Assignment

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 View or Web View). You can also right-click an asset in the list to open the asset's Edit view or to preview the asset.

## 8.5.4 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 functions described in this section may not be available to you.

For information about using workflow functions, see these topics:

- [Assigning an Asset to a Workflow](#)
- [Setting a Process Deadline](#)
- [Setting an Assignment Deadline](#)
- [Finishing Your Assignments](#)
- [Delegating Your Assignments](#)
- [Abstaining from Voting](#)
- [Resolving Deadlocks](#)
- [Removing an Asset from Workflow](#)
- [Viewing an Asset's Participant \(Assignee\) List](#)
- [Setting Workflow Participants](#)

- [Examining the Workflow Progress of an Asset](#)

### 8.5.4.1 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 an 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 the 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. From the Contributor interface, select the site containing the asset you want to assign to a workflow.
2. Find and open the asset you want to place in workflow. For instructions on finding assets, see [Finding and Organizing Assets](#).  
A tab opens displaying the asset's Inspect view (in either Form View or Web View).
3. In the menu bar, select **View**, then select **Status**.
4. In the **Workflow commands** drop-down list, choose **Select Workflow**.  
The tab displays the Select Workflow form.
5. In the **Workflow Process** drop-down list, 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 see the **Set Participants...** button. Do the following:
  - Click **Set Participants...**  
The tab displays the Set Participants form.
  - Select at least one user for each role and then click **Set Participants**.  
Each participant you select becomes an assignee in the respective roles for this asset.
7. (Optional) In the **Action to Take** field, enter brief instructions for the person receiving the assignment.
8. Click **Select Workflow**.

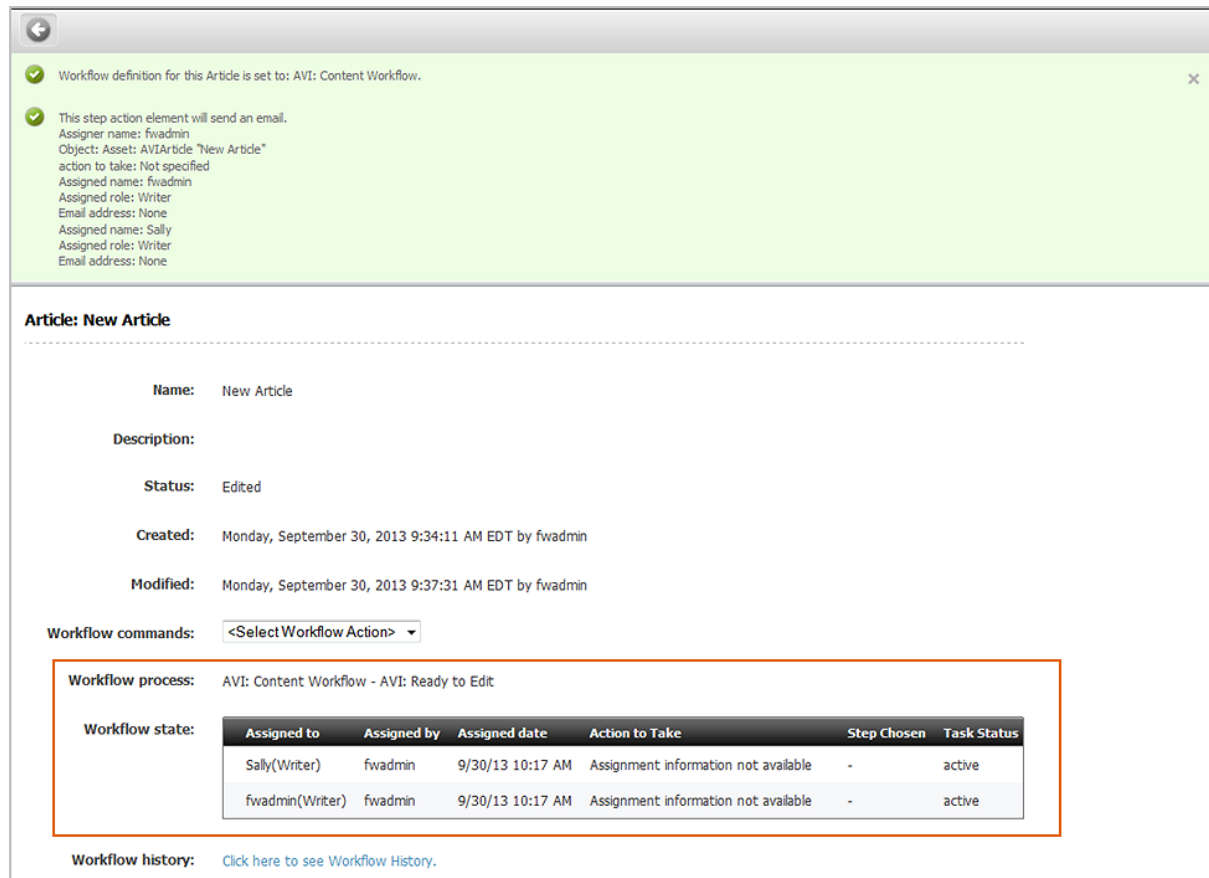
**Note:**

If the administrator enabled the selection of assignees for the first step in the workflow process, the tab displays the Choose Assignees form.

In such cases, select at least one user for each role, then click **Set Assignees**.

The tab displays the asset's status summary form. The **Workflow process** and **Workflow state** fields show the asset's status in the workflow process (as shown in [Figure 8-15](#)).

**Figure 8-15 Status Summary Form**



At this point, the asset is in workflow; participants with roles required by the next state typically receive e-mail notifications of their assignments.

**8.5.4.2 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.

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**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. From the Contributor interface, select the site containing the asset for which you want to set a process deadline.
2. Navigate to the Assignments section of your dashboard (located in the **Home** tab) and click the name of the asset for which you want to assign a process deadline.

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form.

4. In the **Workflow commands** drop-down list, select **Set Process Deadline**.

---

---

**Note:**

If you do not see the **Set Process Deadline** function in the drop-down list, 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.

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 form.

### 8.5.4.3 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 includes an **Assignment Deadline** field.

---

---

1. From the Contributor interface, select the site containing the asset for which you want to assign a process deadline.
2. Navigate to the Assignments widget on your dashboard (located in the **Home** tab), and 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 View or Web View).

3. In the menu bar, select **View**, then select **Status**.
4. In the **Workflow commands** drop-down list, select **Set Assignment Deadline**.

---

---

**Note:**

If you do not see the **Set Assignment Deadline** function in the drop-down list, 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.

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 form.

#### 8.5.4.4 Finishing Your Assignments

After you complete your work for an assignment, you have 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. From the Contributor interface, select the site containing the assignment you want to finish.
2. Access the asset's Finish My Assignment form.

If you are currently working with the asset:

- In the menu bar, select **View**, then select **Status**.  
The tab displays the asset's status summary form.
- In the **Workflow commands** drop-down list, select **Finish My Assignment**.

If the asset is not open:

- Access your dashboard by clicking the **Home** tab.
- Navigate to the Assignments section of your dashboard.
- In the list of assets assigned to you, select the asset's row and then click **Finish Assignment**.

The Finish My Assignment form opens.

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 see the **Assignment Deadline** field.

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 is shown 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 [Setting an Assignment Deadline](#).

---

What happens after you complete your assignment depends on the way the administrator set up the next workflow step. The following 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, is similar to the **Assign From a List of Participants** option described earlier, but instead of predetermining at the beginning of the workflow who gets the assignment during which workflow state, 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.
- **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.

#### 8.5.4.5 Delegating Your Assignments

As you review your assignment list, you might find that you are 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 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 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. From the Contributor interface, select the site containing the assignment you want to delegate.
2. Navigate to the Assignments widget on your dashboard (located in the Home tab), and then click the name of the asset you want to assign to another user.



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

3. In the menu bar, select **View**, then select **Status**.
4. In the **Workflow commands** drop-down list, select **Delegate Assignment**.

---



---

**Note:**

If you do not see the **Delegate Assignment** function in the drop-down list, stop here. You do not have the right permissions to access the function or no other users are assigned your role to whom you can delegate your assignment.

---



---

The tab displays the 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 list. In the **Assigned to** drop-down list, if you are delegating the assignment on behalf of another user, select the user who wants 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 form. 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.

#### 8.5.4.6 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), if yours is not the last (or only) vote for that particular role, or step, or both. When you abstain, you still have the assignment, but the asset can continue through workflow.

To abstain from voting on an assignment:

1. From the Contributor interface, select the site containing the asset for which you want to abstain from voting.
2. Navigate to the Assignments widget on your dashboard (located in the Home tab), and click the name of the asset for which you want to abstain from voting.

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form.

4. In the **Workflow Commands** drop-down list, select **Abstain from Voting**.  
The tab displays the 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 to Take** field, enter a brief explanation for your abstention.
7. Click **Abstain from Voting**.

The tab displays the asset's status summary form. The abstention is denoted in the **Workflow state** field (as shown in [Figure 8-16](#)). Keep in mind that abstaining does not cancel your assignment.

**Figure 8-16 Status Summary Form: Abstain from Voting**

The screenshot shows a web interface for a workflow process. At the top, a green notification bar states "Successfully abstained from voting." Below this, the article title is "New Article". The form displays various metadata fields: Name (New Article), Description, Status (Edited), Created (Monday, September 30, 2013 9:34:11 AM EDT by fwadmin), and Modified (Monday, September 30, 2013 9:37:31 AM EDT by fwadmin). The Workflow commands dropdown is set to "<Select Workflow Action>". The Workflow process is "AVI: Content Workflow - AVI: Ready to Edit". The Workflow state section contains a table with two rows. The second row is highlighted with an orange border and shows the user "fwadmin(Writer)" with a task status of "abstain". The Workflow history section includes a link to "Click here to see Workflow History." The Delivery section shows "Approval State: Needs Approval. Not yet approved for publish."

Assigned to	Assigned by	Assigned date	Action to Take	Step Chosen	Task Status
Sally(Writer)	fwadmin	9/30/13 10:17 AM	Assignment information not available	-	active
fwadmin(Writer)	fwadmin	9/30/13 10:17 AM	Assignment information not available	-	abstain

#### 8.5.4.7 Resolving Deadlocks

A deadlock can occur when multiple steps are available 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, a deadlock occurs.

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:

1. Vote again on the assignment and select to finish it, as described in [Finishing Your Assignments](#).
2. 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 [Abstaining from Voting](#)).

#### 8.5.4.8 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. From the Contributor interface, select the site containing the asset you want to remove from workflow.
2. Navigate to the Assignments widget on your dashboard (located in the Home tab), then click the name of the asset you want to remove from workflow.

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form.

4. In the **Workflow commands** drop-down list, select **Remove from Workflow**.

The tab displays the 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 status summary form. The **Workflow process** field denotes the removal. All assignments for the asset are automatically cancelled.

#### 8.5.4.9 Viewing an Asset's Participant (Assignee) List

To examine an asset's participant (assignee) list:

1. From the Contributor interface, select the site containing the asset whose participant list you want to view.
2. Navigate to the Assignments widget on your dashboard (located in the **Home** tab), and then click the name of the asset whose participant list you want to view:

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

3. In the menu bar, select **View**, then select **Status**.

4. In the **Workflow commands** drop-down list, select **Show Participants**.

**Note:**

If you do not see the **Show Participants** function in the drop-down list, 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 form (shown in [Figure 8-17](#)).

**Figure 8-17 Show Participants Form**



Step	Users Authorized	Users Notified
Reject	fwadmin, Napoleon, firstsite	Connie, fwadmin, firstsite
Send for Approval	Connie, fwadmin, firstsite	fwadmin, Napoleon, firstsite
Return for Edit	fwadmin, Napoleon, firstsite	Connie, fwadmin, firstsite
Approve and Lock	fwadmin, Napoleon, firstsite	No Users.
Create	fwadmin, Conrad, firstsite	Connie, fwadmin, firstsite

For each step in the workflow process, the Show Participants form 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 gets 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.

#### 8.5.4.10 Setting Workflow Participants

When 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. From the Contributor interface, select the site containing the asset for which you want to set workflow participants.
2. Navigate to the Assignments widget on your dashboard (located in the **Home** tab), and then click the name of the asset for which you want to set participants:

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form.

4. In the **Workflow commands** drop-down list, select **Set Participants**.

**Note:**

If you do not see the **Set Participants** function in the drop-down list, 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 8-18](#)).

**Figure 8-18 Set Participants Form**

**Set Participants**

Please select at least one user from each role

Cancel Set Participants

Article Name: New Article  
Description:  
Workflow Process: AVI: Content Workflow  
Participants:

Role	Users
*Editor_In_Chief:	fwadmin Tina
*GeneralAdmin:	fwadmin
*Reviewer:	Bill demo fwadmin
*Writer:	fwadmin Sally

Select All

Cancel Set Participants

Each participant you select in this form becomes an assignee in the respective roles for this asset.

5. Choose the assignees for this assignment by selecting the names of the users in each of the role lists.
6. Click **Set Participants**.

The tab displays the asset's status summary form. 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.

**8.5.4.11 Examining the Workflow Progress of an Asset**

To examine the workflow progress of an asset:

1. From the Contributor interface, select the site containing the asset whose workflow progress you want to view.
2. Navigate to the Assignments widget on your dashboard, and then click the name of the asset.

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

3. In the menu bar, select **View**, then select **Status**.

The tab displays the asset's status summary form.

4. Navigate to the fields containing the asset's workflow summary.
  - The **Workflow process** field indicates the workflow process the asset is currently passing through.
  - The **Workflow state** field displays a table that indicates where the asset currently is in the workflow process and to whom the asset is currently assigned.
  - The **Workflow history** field 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.

If you do not see the Workflow history table, click the **Click here to see Workflow History** link to display the table.

[Table 8-4](#) defines all of the columns in the **Status** and **Workflow history** lists.

**Table 8-4 Columns in the Status and Workflow History Lists**

Column	Definition
Assigned To	The user names of the assignees for each assignment. Note that the user's role is shown 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 <b>Workflow history</b> 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.

**Table 8-4 (Cont.) Columns in the Status and Workflow History Lists**

Column	Definition
Action to Take	Instructions from the user who assigned the asset, assuming that person entered instructions in the Finish My Assignment form when they finished their assignment (see <a href="#">Finishing Your Assignments</a> ). 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 multiple next steps exist in the Finish My 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.
Task Status	The status of the assignment. Possible values are as follows: <ul style="list-style-type: none"> <li>• Abstain - the assignee has abstained from voting.</li> <li>• Active - the asset is currently assigned to someone.</li> <li>• 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.</li> <li>• Completed - the assignee has completed the step.</li> <li>• Delegated - the assignment has been delegated to another user in the same role.</li> <li>• Queued - the asset has multiple assignees for the current state, the next step is all-voting, and not everyone has voted yet. (Also shown if the asset is deadlocked.)</li> </ul>





# Part III

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## Marketing and Analyzing

This part contains information about the marketing features WebCenter Sites provides to analyze visitor interactions on the website and create and implement effective sales campaigns on your website.

This part contains the following chapters:

- [Understanding WebCenter Sites: Visitor Services](#)
- [Working with A/B Testing](#)
- [Working with Engage Assets](#)



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# Understanding WebCenter Sites: Visitor Services

Visitors to your website have their profile and activity information spread across different systems you own. For example, a visitor may have recently viewed an Eloqua email, downloaded a CRM white paper, or logged in via Facebook or Google. Each online activity collects a different set of visitor attributes.

The WebCenter Sites: Visitor Services component provides visitor profile storage, management, and targeting for WebCenter Sites. Visitor attributes from different sources are enriched with data available from other repositories and automatically linked through aggregate templates and a unique visitor ID. Your organization can create as many aggregated templates as needed, choosing the attributes you want from different visitor profiles, and use them to target content on WebCenter Sites delivered pages.

For more information about Visitor Services from a developer perspective, see *Developing Visitor Services in Developing with Oracle WebCenter Sites*.

## Visitor Services Tasks for Marketers and Developers

- Developers implement and configure the **identity provider** for the single sign-on system (SSO) to authenticate site visitors to Visitor Services.

Visitor Services ships with an Oracle Access Manager identity provider for integration with Oracle Access Manager.

- Developers create and configure **access providers** to determine which applications can access information from visitor profiles.

An access provider authenticates REST calls made between Visitor Services and WebCenter Sites. Oracle recommends using an access provider to maintain a secure connection between Visitor Services and WebCenter Sites. Visitor Services ships with a basic LDAP access provider for authentication against an LDAP directory.

- Marketers provide input into the **profile providers** used to compile and enrich visitor profiles.

A profile provider allows a visitor identity to be associated with a visitor profile. Developers implement and configure profile providers for specified repositories in Visitor Services, and write enrichment rules to collect visitor information from all profile providers. Visitor Services ships with an Eloqua profile provider for integration with the Eloqua Cloud Marketing Service, and an Oracle Access Manager profile provider for integration with Oracle Access Manager.

- Marketers provide input into the **aggregate templates** that determine which data, based on visitor profiles, is returned to the site visitors.

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An aggregation template links visitor profiles and lets you combine information from different visitor profiles. Developers write aggregation rules and templates that combine profile information from visitor profiles.

- Marketers provide input into how visitor profiles from Visitor Services are **requested** and **used**.

To make use of visitor profiles, WebCenter Sites components must request them via Visitor Services APIs (REST, JAVA, or JavaScript) during runtime. Visitor Services comes integrated with:

- **Engage:** Use visitor profiles to determine Engage segments and provide recommendations. For example, a marketer might use visitor profile attributes such as age and income to create segments and deliver recommendations. For anonymous visitors, create segments for them based on attributes such as device used to access the site, time zone, locale, browser, referrer (Facebook, Twitter, Bing), or IP address. See [Working with Engage Assets](#).
- **A/B Testing:** Use visitor profiles for determining segments, then use the segments to target those visitors for A/B tests. See [Working with A/B Testing](#).

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## Working with A/B Testing

The Oracle WebCenter Sites: A/B Testing feature enables you to experiment with design and content variations on your website pages and determine which variations produce the optimal results, before making permanent changes to your website. Use the feature's in-context, visual method to create A/B tests on any pages delivered by Oracle WebCenter Sites.

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**Note:** A/B test functionality for this Oracle WebCenter Sites product is provided through an integration with Google Analytics. To use the A/B test functionality for this Oracle product, you must first register with Google for a Google Analytics account that will allow you to measure the performance of an "A/B" test. In addition, you acknowledge that as part of an "A/B" test, anonymous end user information (that is, information of end users who access your website for the test) will be delivered to and may be used by Google under Google's terms that govern that information.

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For example, you might use A/B Testing to explore:

- Which banner image resulted in more leads generated from the home page?
- Which featured article resulted in visitors landing on a promoted section of the website?
- Do visitors spend more time on the home page with a red banner displayed versus a blue banner?
- Does adding a testimonial increase the click-through rate?
- Which page layout resulted in more visitors downloading the featured white paper?

For information about working with A/B Testing, see these topics:

- [A/B Test Overview](#)
- [Before You Begin A/B Testing](#)
- [Creating A/B Tests](#)
- [Approving and Publishing A/B Tests](#)
- [Using A/B Test Results](#)
- [Deleting an A/B Test](#)

## 10.1 A/B Test Overview

Creating and running A/B tests involves the following main steps, which are described in detail throughout this chapter:

**1. Decide what the test will compare.**

An A/B test compares two or more variants, where variant A serves as the control (base), and variant B and any additional variants (C, D, and so on) are each compared with A.

You can run multiple A/B tests at the same time.

**2. Decide what the test will measure.**

You use a *goal* to specify the visitor action the test will capture and compare for the variants, and then display as A/B test results. A goal refers to a specific visitor action that you identify for tracking, and you can specify the type of goal that fits your use case. The default goals are Destination, Duration, Pages per session, and Event. For example, if you choose **Destination**, you can specify a page `likesurfing.html`. The conversion occurs whenever anyone visits this page.

**3. In A/B Test mode in the Oracle WebCenter Sites: Contributor interface, create an A/B test and add variants to it.**

On the management system, create the test and use the WYSIWYG A/B test mode to add one or more variants to a selected web or mobile page. You can identify a variant by its color-coding, and easily save or discard its tracked changes. In the figure below, first variant (B) displays in green in both the A/B Test panel (B) and in each change (1) on the page. See [Creating A/B Tests](#).

Figure 10-1 A/B Test Mode

The screenshot displays the A/B Test Mode interface for a website. The main content area shows a surfing website with a large wave image and several article teasers. On the right, a sidebar panel is open, showing the 'A/B Test' configuration options. The 'A/B Test' tab is selected, and the 'Criteria' tab is also visible. The configuration includes a 'New Test' dropdown, an 'Enter Test Description' field, and three variants: 'A Base' (CONTROL), 'B' (VARIANT), and 'C' (VARIANT). Below the variants, there is a 'Tracked Changes (Hide)' section showing 'Page layout changed' and an 'Unsaved changes' section showing '1 Primary content List changed'.

#### 4. Select criteria for the A/B test.

- Specify when and how the test will **start** and **end**. In Google Analytics it appears as a length of time. For example, if you select 14 as the start date and 28 as the end date, in Google Analytics, it appears as 2 weeks. See [Specifying the Start and End of an A/B Test](#).
- Specify a statistical **confidence level** to achieve. For example, enter 95 for a 95% confidence level in the results. See [Selecting the Confidence Level of an A/B Test](#).
- Click **Select Goal** and choose a goal in the dialog box that appears. See [Specifying the Goal to Track in an A/B Test](#).
- Select the **visitors** or **segments** to target for the test. You can display the test to a specified percent of the entire visitor pool or to a specified percent of one or more selected visitor segments. See [Specifying Visitors or Segments to Target in A/B Tests](#).

**Figure 10-2 A/B Test Criteria Pane**

Author: fwadmin

A/B Test Criteria

Start: Pick a date

End: Pick a date

Confidence: 95%

Select Goal

Not Selected

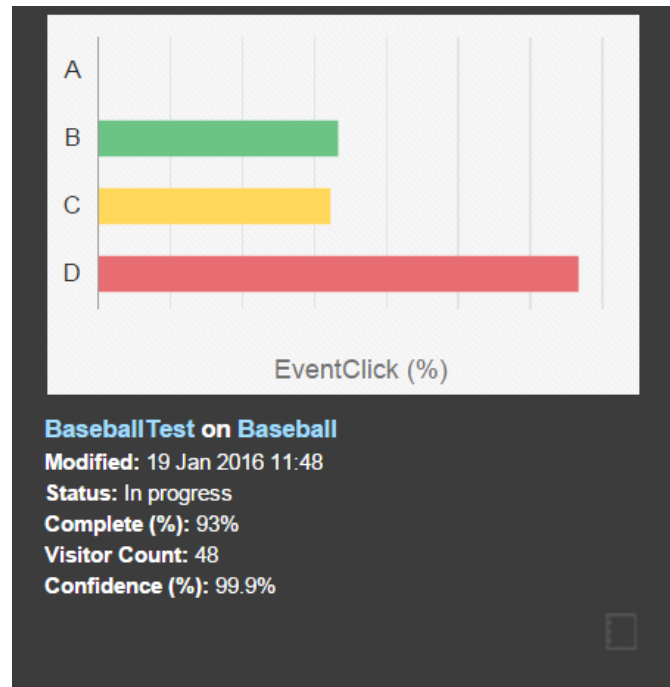
Target: Visitors

% of visitors 100

5. **Approve the test (and its dependencies) to see the actual Experiment in Google.**  
See [Approving and Publishing A/B Tests](#).
6. **View test results in the A/B Test Report.**

As visitors view variants and conversions take place, you can view the results for individual A/B tests on the report, which maintains the same variant color-coding you saw while creating test variants. The report enables you to see if there are measurable differences in visitor actions between variants. A cookie is left so that visitors see the same variant upon returning to the site. See [Viewing A/B Test Results](#).



**Figure 10-3 A/B Test Showing Variants**

#### 7. Optionally update the site to use the winning variant.

After displaying the winning variant for a while, you might copy or create an A/B Test to include new variants, enabling you to refine iterations over time.

## 10.2 Before You Begin A/B Testing

Creating A/B tests requires the following prerequisites to be in place:

- The A/B test asset type `WCS_ABTest` must be enabled. By default it is not enabled, except in the “avisports” and “FirstSite II” sample sites.

A WebCenter Sites administrator or developer enables asset types.

For more information, see *Administering A/B Testing in Administering Oracle WebCenter Sites*.

- The A/B code element must be included in templates on which A/B tests will be run. This code element is not included in templates by default.

A WebCenter Sites developer adds the A/B code element to templates.

For more information, see *Template Assets in Developing with Oracle WebCenter Sites*.

- The property `abtest.delivery.enabled` must be set to true on the delivery instance, that is any instance that will deliver the A/B test variants to site visitors. The property should not be set on instances that are used only to create the A/B tests, because this will give false results. The `abtest.delivery.enabled` property is in the ABTest category of the `wcs_properties.json` file.

For more information, see *A/B Test Properties in Property Files Reference for Oracle WebCenter Sites*.

- Any user that will be able to “promote the winner” of an A/B test must be given the `MarketingAuthor` role. Any user that will be able to view A/B test reports and stop tests must be given the `MarketingEditor` role.

For more information on configuring users, see *Configuring Users, Profiles, and Attributes* in *Administering Oracle WebCenter Sites*.

## 10.3 Creating A/B Tests

Creating an A/B Test involves setting up variants of the web page to be tested, then setting up the criteria that will be applied during the test.

For information about creating A/B tests, see these topics:

- [Switching In and Out of A/B Test Mode](#)
- [Creating, Copying, and Selecting A/B Tests](#)
- [Setting Up A/B Test Variants](#)
- [Setting Up A/B Test Criteria](#)

### 10.3.1 Switching In and Out of A/B Test Mode

Working with A/B tests in Contributor is similar to editing in Web view. Two key differences are that in A/B test mode you make page changes to a test layer of variants rather than to site pages themselves, and an A/B Test panel displays at right.

For information about switching in and out of A/B test mode, see these topics:

- [Switching Into A/B Test Mode](#)
- [Switching Out of A/B Test Mode](#)

#### 10.3.1.1 Switching Into A/B Test Mode

This task assumes you are in Contributor Web View, shown by the word “Web” in the toolbar view control.

1. Display the browser page or mobile page on which to add a test.
2. Click the **A/B Test** icon in the upper right of the menu bar.



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**Note:**

When you hover the cursor over the icon, its tooltip indicates the number of tests that already exist for a page, if any (for example, "There are 2 A/B Tests for this page").

---

If A/B Testing is not enabled for the page, the A/B test is still created, although you will see a warning message above the page.

If there are no A/B tests for a page, the panel at right contains a single control showing the text “Create a test”.

If one or more A/B tests already exist for a page, the panel at right shows the A/B Test controls and an option to change to the Criteria controls:

- Use the **A/B Test** controls to create and edit tests for a page, and to track changes that you make to a page's variants.
- Use the **Criteria** controls to set the criteria for the selected test, such as its start and end determinants, which conversion to measure, and target and confidence information.

The controls in the toolbar also change when in A/B Test mode:

- The toolbar label changes to **A/B Test**.
- If the test has not yet been published, a **Save** icon and a **Change Page Layout** icon are available.
- An **Approve** icon and a **Delete** icon are always available.
- There are no **Edit**, **Preview**, **Checkin/Checkout**, or **Reports** icons.

### 10.3.1.2 Switching Out of A/B Test Mode

- Click the X in the top right of the A/B Test panel.

If you have just created or made changes to the test without saving it, you are prompted to save the test before it is closed.

## 10.3.2 Creating, Copying, and Selecting A/B Tests

You can create A/B tests, make copies of them, and select existing tests.

For information about creating, copying, and selecting A/B tests, see these topics:

- [Creating an A/B Test for a Page](#)
- [Copying A/B Tests](#)
- [Selecting A/B Tests](#)

These tasks assume that you are working in A/B Test Mode.

### 10.3.2.1 Creating an A/B Test for a Page

1. In the list box containing either the text "Create a test" or a list of existing tests, click the + (plus) button beside the list box.
2. In the Create New Test window, enter a name for the test in the top or only field.
3. Click **Submit**.
4. In the A/B Test toolbar, click the **Save** icon.

### 10.3.2.2 Copying A/B Tests

1. Click the + (plus) button beside the list of existing tests.
2. In the Create New Test window, select a test to copy in the **Copy** field.

In the top field, you can change the default name assigned.

3. Click **Submit**.
4. In the A/B Test toolbar, click the **Save** icon.

### 10.3.2.3 Selecting A/B Tests

- Open the drop-down list of existing tests and select the one you want.

After creating, copying, or selecting a test, you can work with its variants (described in [Adding/Selecting and Editing A/B Test Variants](#)) and select its criteria. The criteria you select apply to all variants of the test.

## 10.3.3 Setting Up A/B Test Variants

For information about setting up A/B test variants, see these topics:

- [Adding/Selecting and Editing A/B Test Variants](#)
- [Changing the Page Layout of an A/B Test Variant](#)
- [Deleting A/B Test Variants](#)

### 10.3.3.1 Adding/Selecting and Editing A/B Test Variants

In this procedure you define the A/B test by selecting a variant in the panel and making edits to its webpage, then use the color-coding and numbering to identify the selected variant and its changes.

To add/select and edit test variants:

1. Enter A/B Test mode (see [Switching Into A/B Test Mode](#)) and select a test to work on in the **Test** field at the top of the panel.

Below the test description field, variants of the current webpage are listed. Initially, there is the base webpage **A** and a single variant of this webpage **B**. You can add further variants of the base webpage, which will become **C**, **D**, **E**, etc.

**A**, the original webpage, is the control.

The selected variant has its letter displayed in a color-coded circle. Clicking **B** displays its green circle, clicking **C** displays its yellow circle, and so on. As you modify the selected variant's webpage, circles of the same color display on the webpage, with numbers to indicate the changes.

Changes made to a variant are listed in the **Tracked Changes** section at the bottom of the panel. The change numbers correspond to the color-coded numbers on the webpage.

In addition to a reference-only name, each variant is identified by:

- A **letter**. The **B** variant is already created and selected, ready for you to begin modifying it. (**A** is the control, the original webpage.)
- A **name**. The name of the base webpage is initially "Base", and the names of the variants are initially "B", "C", "D", etc. You can change these names at any time.
- A **color-coded circle** that displays to indicate the selected variant. For example, clicking **B** displays its green circle, clicking **C** displays its yellow circle, and so

on. As you modify the selected variant's webpage, circles of the same color but with numbers display on the webpage.

- **Numbered changes.** These display in the **Tracked Changes** section at the bottom of the panel. Changes are assigned numbers that correspond to the color-coded numbers on the webpage.

## 2. Select or add a variant.

- To select a variant, click its letter (for example, **B**). A circle in its assigned color displays.
- To add a variant, click the + (plus) button below the last variant. A new variant is added and selected, and a circle in its assigned color displays. You can enter a name for the variant at any time. Your system may be configured to automatically save the variant at this point. If not, before switching to another variant, you must save the current variant, by clicking the **Save** icon on the toolbar.

## 3. In the page editing area, make changes to the selected variant as you would change a page in web view. For example, you might change a headline or replace an image.

You can use the search facility to find assets to include on a variant page. The search results panel will temporarily cover the A/B test panel. Move assets onto the variant page by dragging and dropping from the search results panel. Close the search panel to reveal the A/B test panel again.

You can also perform these edits:

- [Deleting A/B Test Variants](#)
- [Changing the Page Layout of an A/B Test Variant](#)

As you make changes, they are listed, described, and numbered in the **Tracked Changes** section. Their numbers correspond to the numbers displayed in color-coded circles on the webpage. Changes you have made but not saved are listed in the **Unsaved Changes** section. As you move the mouse over each item in the **Tracked Changes** section, that item is highlighted on the webpage.

You can click the **(Hide)/(Show)** control to switch between hiding and showing the numbered circles on the webpage. You can also drag and drop the numbered circles to reposition them if they block your webpage view.

## 4. Save or discard the tracked changes:

- To save all the changes you have made to the webpage variant, click the **Save** button in the A/B Test toolbar.
- To discard any change in the Tracked Changes list (even saved ones), click the **X** (delete) control that appears next to the change description when you hover your mouse over it. You will be made to save the variant at the same time that the change is discarded.

## 5. Save the test.

### 10.3.3.2 Changing the Page Layout of an A/B Test Variant

You may want a variant to use a different page layout from the control or other variants.

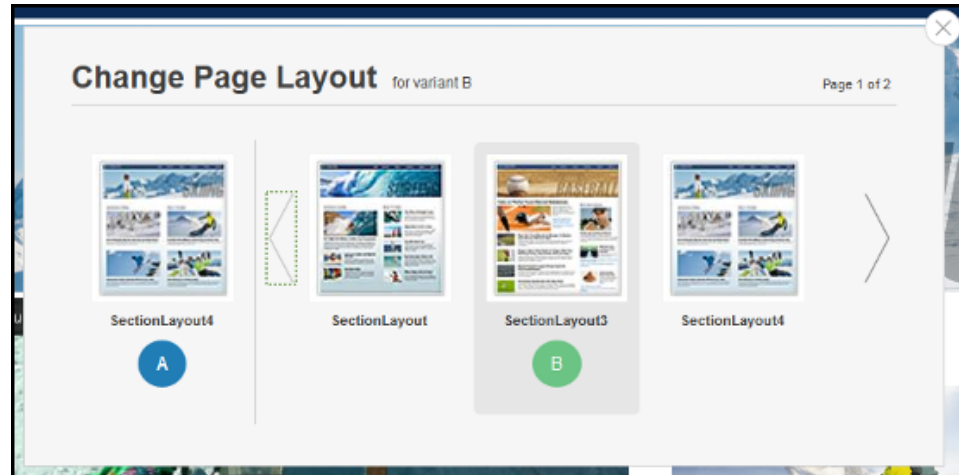
1. After selecting a test and variant in the A/B Test panel, click the **Change Page Layout** icon in the toolbar.

**Figure 10-4** Page Layout Icon



2. In the Change Page Layout window (Figure 10-5), select another page layout to use. The layouts selected for the control (A) and other variants are identified.

**Figure 10-5** Change Page Layout Window



3. After you select a page layout for the test variant, the dialog will refresh showing Cancel and Apply buttons. Click **Apply** to apply the current variant with the selected page layout. The change will show in the Tracked Changes table but will not have a number.

### 10.3.3.3 Deleting A/B Test Variants

To delete a variant, click its X. You are prompted to save if unsaved changes will be lost upon leaving the page.

## 10.3.4 Setting Up A/B Test Criteria

For information about setting up A/B test criteria, see these topics:

- [Specifying the Start and End of an A/B Test](#)
- [Selecting the Confidence Level of an A/B Test](#)
- [How the A/B Test Confidence Level is Calculated](#)
- [Specifying the Goal to Track in an A/B Test](#)
- [Specifying Visitors or Segments to Target in A/B Tests](#)

### 10.3.4.1 Specifying the Start and End of an A/B Test

When creating a test, you can specify a start and end for it. If you do not specify a start, the test will start as soon as it is published. Once a test starts running, you can view its current results, stop it early, and promote its winner, as described in [Viewing A/B Test Results](#) and [Making Site Changes Based on A/B Test Results](#). You cannot edit a test after it is published.

1. In A/B test view, click **Criteria** in the A/B Test panel (see [Switching Into A/B Test Mode](#)).
2. Specify a test start date and time, in one of the following ways:
  - To start the test when A/B test assets are approved, leave the start field blank. The test will begin after publishing begins, as described in [Approving and Publishing A/B Tests](#).
  - To start the test on a certain date, click the calendar next to the **Start** field and select a date from the calendar picker. By default, the start time is set to the current time. (If you select the current date and time, the test starts upon publish.) You can use the **HH**, **MM**, and **SS** fields to specify another start time, in which case select the date again to apply the new time. You can also enter a new value for the time by overwriting the one currently shown. Your server setup determines whether the start time uses a 12 or 24 hour format. If set for a 12 hour format, enter AM or PM.
3. To end the test at a specific date and time, select **Date** in the **End** field, then click the calendar below and select a date and time from the calendar picker. Specify an end time the same way you specify a start time, as described above.

The test will continue beyond the test end that you set here if you also set a confidence level that is not achieved by the test end point. See [Selecting the Confidence Level of an A/B Test](#).

4. Click **Save**.

### 10.3.4.2 Selecting the Confidence Level of an A/B Test

When creating a test, you can select a confidence level for its results. This number determines confidence in the significance of the test results, specifically that conversion differences are caused by variant differences themselves rather than random visitor variations. The larger the number of A/B test visitors, the easier it is to determine statistical significance in variant differences.

If you set a confidence level, the A/B test will continue until the set level is reached, even beyond the set end point of the test.

For information about confidence level calculation, see [How the A/B Test Confidence Level is Calculated](#).

To select a test confidence level:

1. In A/B test view, click **Criteria** in the A/B Test panel (see [Switching Into A/B Test Mode](#)).
2. In the **Confidence** field, select or enter a confidence level percent. You can select percents ranging from 85% to 99.9%

3. Click **Save**.

### 10.3.4.3 How the A/B Test Confidence Level is Calculated

The conversion rate refers to the number of visitors who performed the specified visitor action divided by the number of visitors to the page variant. This rate is calculated per variant.

The confidence interval is calculated using the Wald method for a binomial distribution. In the Wald Method (Figure 10-6), conversion rate is represented by  $p$ .

**Figure 10-6** Wald Method of Determining Confidence Intervals for Binomial Distributions

$$SE = \sqrt{\frac{p(1-p)}{sampleSize}}$$

The results for each variant are then used to calculate the Z-Score (Figure 10-7). The Z-score measures how accurate results are. A common Z-Score (confidence range) used in A/B Testing is a 3% range from the final score. However, this is only a common use, and any range can be used. The range is then determined for the conversion rate ( $p$ ) by multiplying the standard error with that percentile range of standard normal distribution.

At this point the results must be determined to be significant; that is, that conversion rates are not different based on random variations. The Z-Score is calculated in this way:

**Figure 10-7** Z-Score Calculation

$$Z\text{-Score} = \frac{P_{\text{variationB}} - P_{\text{variationA}}}{\sqrt{SE_{\text{variationA}}^2 + SE_{\text{variationB}}^2}}$$

The Z-Score is the number of positive standard deviation values between the control and the test mean values. Using the previous standard confidence interval, a statistical significance of 95% is determined when the view event count is greater than 1000 and that the Z-Score probability is either greater than 95% or less than 5%.

### 10.3.4.4 Specifying the Goal to Track in an A/B Test

Marketers are required to create and use custom goals in Google Analytics for A/B testing. These goals must be created before setting up A/B tests. You can create goals of your own, or you can use goals created by others.

To specify the goal to track:

1. In A/B test view, click **Criteria** in the A/B Test panel).
2. Click **Select Goal**.
3. In the Goals dialog box, choose a goal, then click **Select**.

Goals are listed by name and type. If needed, click the **Sort** button to change their sort order. The selected goal's name displays under the **Select Goal** button.

4. Click **Save**.



### 10.3.4.5 Specifying Visitors or Segments to Target in A/B Tests

You can randomly display an A/B test to a specified percent of either:

- The entire visitor pool
- One or more selected segments

For example, you might enter 50 to target the test to 50% of all visitors or to 50% of visitors in a segment of visitors 65 years or older. (For more information about segments, see [Creating Segments](#).)

Within the specified percent, test variants display in equal percentages to the target visitors. For example, if a test targeting 30% of visitors includes two variants (B and C) in addition to the control (A), 10% of visitors would be shown control A, 10% variant B, and 10% variant C.

To specify visitors or segments to target:

1. In A/B test view, click **Criteria** in the A/B Test panel.
2. In the **Target** field, select **Visitors** to target any visitors, or **Segments** to target visitors who are part of a selected segment.
3. If you selected **Visitors** in the previous step, enter the percentage of visitors to include in the test in the **% of Visitors** field that displays.
4. If you selected **Segments** in the previous step, select one or more segments.
  - Click the **Select Segments** button that displays.
  - In the **Target** field in the Segments window, enter the percentage of visitors in selected segments to include in the test.
  - From the **Segment Name** column, select one or more segments. Click **Sort** to sort the segments list by name or modification date. To deselect a segment, click its x in the **Selected Segments** column.
  - Click **Select**. Selected segment names display under the **Select Segments** button.
5. Click **Save**.

## 10.4 Approving and Publishing A/B Tests

After creating and editing your test's variants and specifying its criteria, the next step is to approve the test for publishing to the delivery system. The test is created in Google Analytics at this time. Uptil this point there is nothing in Google Analytics. After approving the test, you may log into Google and see the experiment and all its settings.

A few items to consider about approval:

- Approving the test approves it and its variants. As with all webpage approvals, you must approve an asset and all of its dependencies.
- The test must include a goal before you can approve it.

- A/B tests are published to a destination that you select. This destination must itself already have been published, by an administrator. Consult your administrator if you find that no published destinations are available to you.
- Upon publishing, the test will begin at the date and time you specified in the test's criteria. If that time has already passed, the test will start immediately.

To approve a test's assets for publishing and to start the test:

1. In A/B test mode, select the test to approve.
2. Click the **Approve** icon in the toolbar, and select a destination.

The Approval screen lists all assets and dependencies.

3. Approve all the assets and dependencies by clicking the **Select All** link, then clicking **Approve With Dependencies**.

For full details about publishing assets, see [Approving and Publishing Content](#).

## 10.5 Using A/B Test Results

The results of your A/B tests are shown in A/B Test reports. You can use these to decide whether one of the variant pages you tested should be promoted to the active web site.

For information about using A/B test results, see these topics:

- [Using A/B Test Results](#)
- [The A/B Test Report](#)
- [Making Site Changes Based on A/B Test Results](#)

### 10.5.1 Viewing A/B Test Results

Once the test begins, whenever visitors view the control (A) or variant versions of the webpage, their site visit information is captured and these statistics become available in the A/B Test report. For completed tests, this report shows data that will let you compare the relative performance of the base and variant webpage designs. You can then use this information to decide whether to promote one of the variants to become the webpage that visitors see. For a full description of this report, see [The A/B Test Report](#).

To view the A/B Test report in the Contributor interface:

1. Search for A/B Tests.

One way to do this is to select the search preset "A/B Test" from the drop-down list in the Search box, then click the Search button.

For each test in progress, a search result box is shown containing a chart and additional information. This shows the latest results for the test, but is not the full report.

2. In the lower right corner of the search result box, click the small book icon.

This opens the A/B Test report, showing all data available.

Depending on the status of the test, the button at the top right of this report will appear as follows:

- If the test is in progress, the button will be red and say **Stop**. If you want to stop (and complete) the test, click this red Stop button. You cannot restart the test once it has stopped.
- If the test is completed, the button will be green and say **Promote**. You can use the results shown in the report to decide if you want to promote a variant to be the page that is displayed to visitors. See [Making Site Changes Based on A/B Test Results](#).
- If the test is not published, the button will be green and say **Edit**. Click the button to edit the test variants further. You cannot edit a test once it is published.

## 10.5.2 The A/B Test Report

A/B Test reports show data that let you compare the relative performance of base and variant webpage designs. You can use this information to decide whether to promote one of the variants to become the webpage that visitors see.

### Header Section

**Figure 10-8 A/B Test Report: Header Section**



**Table 10-1 Features of the A/B Test Report Header Section**

Feature	Description
Product and report name area	Confirms that you are viewing an Oracle WebCenter Sites A/B Test Report.
Status area	Shows whether the report is in progress, complete, or not published.
Button	This is a red Stop button, a green Promote button, or a green Edit button.

## Summary Section

**Figure 10-9 A/B Test Report: Summary Section**

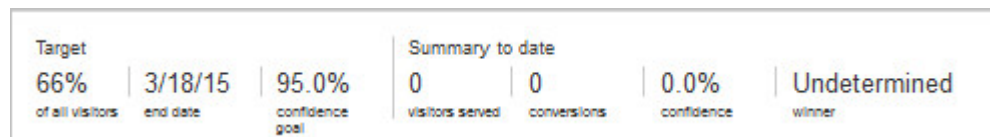


**Table 10-2 Features of the A/B Test Report Summary Section**

Feature	Description
Information area	Shows the name of the A/B test, the name of the web page on which it is running, the owner of the test, and the test's description.
Conversion	The type of conversion that the test is monitoring.
Segments	If the test includes a segmented user base, this describes the segmentation. "All" means the user base is not segmented.
Stop	When or how the test is intended to stop.
Chart	The conversion rate for each variant, displayed together so that they can be compared.

## Metrics Bar

**Figure 10-10 A/B Test Report: Metrics Bar**



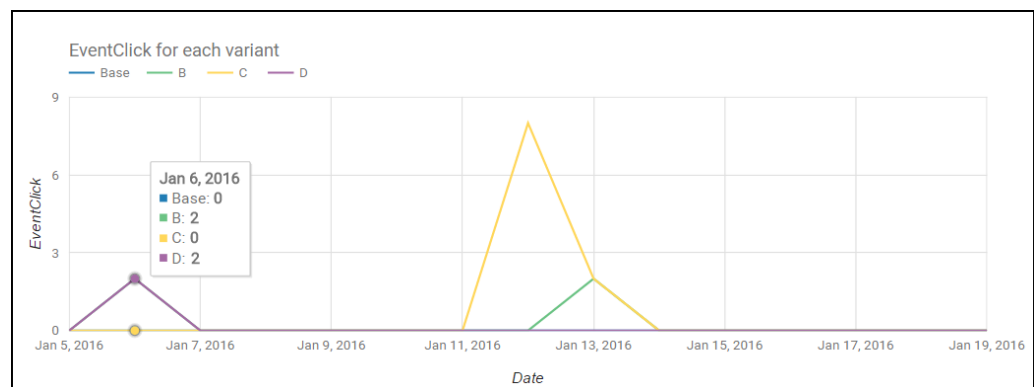
**Table 10-3 Features of the A/B Test Report Metrics Bar**

Feature	Description
Target	The percentage of all visitors, the end date, and the confidence percentage, as set up for the test.

**Table 10-3 (Cont.) Features of the A/B Test Report Metrics Bar**

Feature	Description
Summary to date	The number of visitors served, the number of conversions, and the confidence percentage reached so far, for all variants combined. If the test allows one variant to be identified as better than the others, this is shown as the winner, when the test is complete.

### Conversions Section

**Figure 10-11 A/B Test Report: Conversions Section****Table 10-4 Features of the A/B Test Report Conversions Section**

Feature	Description
Select criteria	Normally set to Device.
Display	Conversion information for each variant.

## Confidence Section

Figure 10-12 A/B Test Report: Confidence Section

Confidence			
Variant Label	Visitors	Conversions	Conv
A Base	2	0	0.0%
B B	12	4	33.33
C C	31	10	32.25
D D	3	2	66.66

Table 10-5 Features of the A/B Test Report Confidence Section

Feature	Description
Chart	For each variant, the number of visitors, the number of conversions, the conversion percentage, the Z-score (see <a href="#">How the A/B Test Confidence Level is Calculated</a> ), and the confidence figure.

### 10.5.3 Making Site Changes Based on A/B Test Results

Based on test results, you may decide to promote a particular test variant, which permanently replaces the control with the selected winning variant and displays it to all visitors.

To promote a variant:

1. Display the A/B test's report, as described in [Viewing A/B Test Results](#), and click **Promote**.
2. From the list of test variants, select the variant to promote. (The Base web page A is not available for selection, because it is the control.)

You determine which variant to promote. For example, the best choice might have a lower conversion rate but highest results from mobile device visitors.

3. Click **Promote**.
4. In the form that displays the page information to publish, click **Promote**.

To display the selected variant on the website for all visitors, you must now publish it. See [Approving and Publishing A/B Tests](#).

## 10.6 Deleting an A/B Test

When you delete an A/B test, you will not be able to access any of the reports that were generated for it. However, the data is not destroyed and you can access EID directly and create your own reports to retrieve it.

If you attempt to delete an A/B test that is running, you will see a warning before you can complete the deletion.

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**Note:** The experiment that is created in Google is not deleted even if you have deleted the A/B test by performing the subsequent steps. To remove an experiment from Google, log into the Google Analytics interface and delete it.

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To delete an A/B Test:

1. In the A/B Test toolbar, click the **Delete** button.

The web page is hidden and a Delete Asset(s) panel is shown. At this stage you can cancel the deletion by clicking the **Go Back** button in the toolbar.

2. Select the assets that you want to delete.
3. Click the **Delete** button. You will not see a warning unless the A/B test you are attempting to delete has been published.

You can return to the web page you were testing by clicking the **Go Back** button in the toolbar.





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## Working with Engage Assets

You can implement Oracle WebCenter Sites: Engage assets to better target your site visitors with preferred content, products, and sales.

For information about working with Engage assets, see these topics:

- [About Engage Assets](#)
- [Grouping Visitors into Segments with Engage](#)
- [Creating and Configuring Recommendations with Engage](#)
- [Creating Promotions](#)

### 11.1 About Engage Assets

Engage assets enable marketers 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 WebCenter 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.

#### 11.1.1 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 about segments, see [Grouping Visitors into Segments with Engage](#).

### 11.1.2 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 about recommendations, see [Creating and Configuring Recommendations with Engage](#).

### 11.1.3 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 one or more 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 about segments, see [Creating Promotions](#).

## 11.2 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.

### 11.2.1 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 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 to be included in the results of the query.

This section covers the following topics:

- [Segments and Visitor Data Assets](#)
- [Developing Segments: Process Overview](#)

### 11.2.1.1 Segments and Visitor Data Assets

You build segments by using the visitor data assets as filtering criteria. The types of visitor data assets are: 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*, no record exists 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.

### 11.2.1.2 Developing Segments: Process Overview

The five general steps for creating segments are:

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 Filtering 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 WebCenter 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.

## 11.2.2 About the Segment Forms

The New Segment form contains two sections that you use to create a segment, the **Content** section and the **Detail** section.

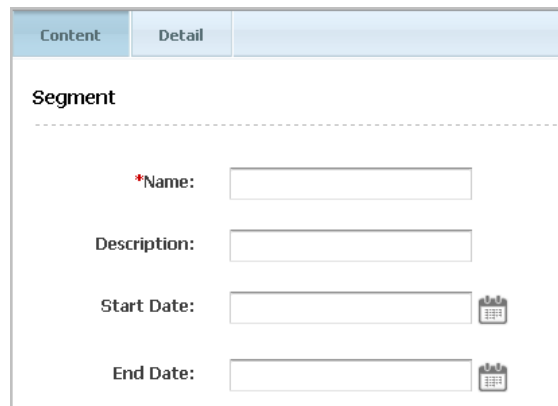
This section covers the following topics:



- [Segment Content Section](#)
- [The Segment Detail Tab](#)

### 11.2.2.1 Segment Content Section

The **Content** section ([Figure 11-1](#)) displays the visitor data assets that you can use to create segments. In this form, you select the criteria that defines your segment.

**Figure 11-1** Content Section of the New Segment Form



Content	Detail
<b>Segment</b>	
-----	
*Name:	<input type="text"/>
Description:	<input type="text"/>
Start Date:	<input type="text"/> 
End Date:	<input type="text"/> 



When viewing an existing segment, the stored information is shown ([Figure 11-2](#)).

Figure 11-2 Populated Content Section of Existing Segment Asset

Content	Detail
<b>Segment: AffluentYoungSingles</b>	
<b>Name:</b>	AffluentYoungSingles
<b>Description:</b>	AffluentYoungSingles
<b>ID:</b>	1124886357615
<b>Status:</b>	Created
<b>Start Date:</b>	Not Available
<b>End Date:</b>	Not Available
<b>Created:</b>	Wednesday, August 24, 2005 1:45:47 PM PDT by admin
<b>Modified:</b>	Wednesday, August 24, 2005 1:45:47 PM PDT by admin

Existing segments are easily modified. From the menu bar select **Edit**, then from the menu select **Edit**. The form as shown in Figure 11-1 is shown in the tab, but populated with the segment's stored data, as shown in Figure 11-3:

Figure 11-3 Edit View of Existing Segment Asset's Content Section

Content	Detail
<b>Segment : AffluentYoungSingles</b>	
<b>*Name:</b>	<input type="text" value="AffluentYoungSingles"/>
<b>Description:</b>	<input type="text" value="AffluentYoungSingles"/>
<b>Start Date:</b>	<input type="text"/> 
<b>End Date:</b>	<input type="text"/> 

### 11.2.2.2 The Segment Detail Tab

While you are creating a segment, Engage displays each condition (criterion) that you add to the segment in a form similar to what is shown in [Figure 11-4](#):

**Figure 11-4** Detail Section of Existing Segment Asset

Content	Detail
<b>Filtering Criteria</b>	
Age	is equal to 30-34 <span style="float: right;">Include</span>
----- <b>OR</b> -----	
Age	is equal to 35-39 <span style="float: right;">Include</span>
----- <b>AND</b> -----	
Marital Status	is equal to Single <span style="float: right;">Include</span>
----- <b>AND</b> -----	
Median Income	is equal to \$100,000 - \$149,999 <span style="float: right;">Include</span>
----- <b>OR</b> -----	
Median Income	is equal to \$150,000+ <span style="float: right;">Include</span>

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, as shown in [Figure 11-5](#), a visitor belongs to the segment only if both criteria are true:

**Figure 11-5** Editing Filtering Criteria

The screenshot shows the 'Filtering Criteria' section of a software interface. It has two tabs: 'Content' and 'Detail', with 'Detail' selected. The section is titled 'Filtering Criteria' and has a 'Hide Tools' link in the top right. Below the title, there are two criteria rows. The first row is for 'Age', with a value of '30-34'. The second row is also for 'Age', with a value of '35-39'. Between these two rows is an 'OR' button. Below the second row is a button to 'Add 'OR' statement'. Below that is an 'AND' button. The third row is for 'Marital Status', with a value of 'Single'. Below this row is a button to 'Add 'OR' statement' and another button to 'Add 'AND' statement'. Each criterion row has an 'Exclude' checkbox and an 'X' icon to delete it.

Add restrictions to a segment by working down the form, adding them to the criteria. In [Figure 11-5](#), 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 covers the following topics:

- [Categories](#)
- [The Shopping Cart Criterion](#)

#### 11.2.2.2.1 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 about the mega menu, see the different steps in [Creating Segments](#).

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#### Note:

The actual categories of visitor data assets are probably different for your installation, depending on the installation options and what your developers have defined. For more information about categories or visitor data, see your developers.

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#### 11.2.2.2.2 The Shopping Cart Criterion

Shopping Cart is listed with the categories on the Segment Filter forms ([Figure 11-6](#)), but the shopping cart is a special, default feature rather than a category of attributes.

**Figure 11-6 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

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.

### 11.2.3 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 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 covers the following topics:

- [Name and Define the Segment](#)
- [Create Segment Filtering Criteria with Visitor Attributes](#)
- [Create Segment Filtering Criteria with History Definitions](#)
- [Define the Segment with Shopping Cart Criteria](#)

#### 11.2.3.1 Name and Define the Segment

To name and define the segment:

1. From the Oracle WebCenter Sites: Contributor interface, select the site you want to work with (FirstSite II in this example).
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 about your permissions.

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 11-7).

**Figure 11-7 Choose Assignees Form**

Choose Assignees

The workflow associated with this asset requires you to select assignees. Select at least one user from each role.

Workflow Process: FSII: Approval for Promotions

Assignees:

Role	Users
*MarketingEditor:	<ul style="list-style-type: none"> <li>firstsite</li> <li>fwadmin</li> <li>Mary</li> </ul>

Set Assignees

3. 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 [Participating in Workflow](#).

4. When the users are selected as assignees, add the general information regarding the segment.

The tab displays the segment asset's **Content** tab (Figure 11-8):

**Figure 11-8 Content Tab of New Segment Asset**

Content Detail

Segment

\*Name:

Description:

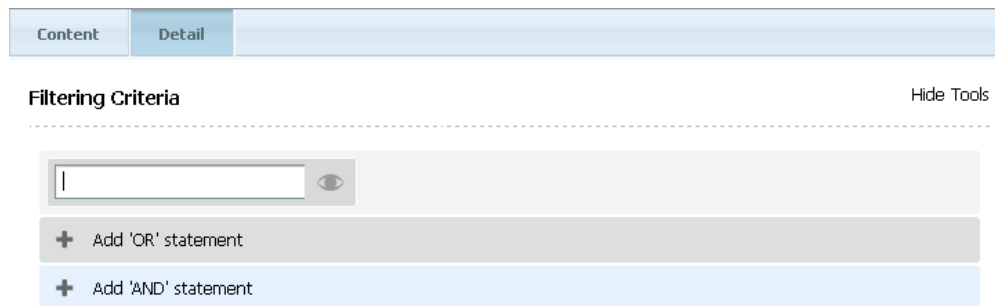
Start Date:

End Date:

- 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 [About Start and End Dates](#).
5. Click the **Detail** section.

The Filtering Criteria form opens (shown in [Figure 11-9](#)). The categories of visitor attributes and history definitions you can use to build your segment are listed in the drop-down list, and also in the mega-menu, which you open by clicking the **mega menu** icon ([Figure 11-10](#)).

**Figure 11-9 Filtering Criteria Form**



**Figure 11-10 Mega Menu Icon**



Note that filtering on text strings is case-sensitive, unless explicitly set not to be so. Do one of the following:

- To create a segment based on buyer contact information, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
- To create a segment based on the user profile, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
- To create a segment based on buyer history, go to [Create Segment Filtering Criteria with History Definitions](#).
- To create a segment based on a history definition, go to [Create Segment Filtering Criteria with History Definitions](#).
- To create a segment based on the shopping cart, go to [Define the Segment with Shopping Cart Criteria](#).

### 11.2.3.2 Create Segment Filtering Criteria with Visitor Attributes

To 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 11-11](#)).

**Figure 11-11 Mega Menu Icon**



Engage displays a list of the attributes in the category.

2. Click the name of the attribute you want to use to define the segment.

The form displays meaningful constraint fields 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 shown in [Figure 11-12](#):

**Figure 11-12 Age Attribute and Values as a Filter**

Note that certain attributes have pre-determined ranges. In this case, the age ranges available are set.

To exclude people who are in that age range, select the **Exclude** check box. Alternately, you can set the values as shown in [Figure 11-13](#):

**Figure 11-13 Age Attribute and Values As a Filter**

4. Add other criteria as necessary.
5. From the menu bar, select **Content**, then select **Save**.  
The criterion is added to the segment and the segment is saved.

### 11.2.3.3 Create Segment Filtering Criteria with History Definitions

To create segment filtering 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 opens. It shows the first history definition in the category, as shown in [Figure 11-14](#):

**Figure 11-14 Purchase Summary Filtering Fields**

It has three general areas that you use to restrict or filter items:

- The first row allows you to 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 check boxes 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 covers the following topics:

- [Filtering Based on a Total](#)
- [Filtering Based on a Count](#)
- [Filtering Based on the First Time a History Definition Was Recorded](#)
- [Filtering Based on the Most Recent Time a History Definition Was Recorded](#)
- [Adding a History Attribute to Further Define the Segment](#)
- [Adding Products to Further Define the Segment](#)

#### 11.2.3.3.1 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. A history attribute 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, as shown in [Figure 11-15](#):

**Figure 11-15 First Row of Purchase Summary**

- In the next row, select **A specific time period**, then specify the time period to use for the total in the date fields.

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 shown in [Figure 11-16](#):

**Figure 11-16 Specific Time Period Entry for Purchase Summary**

- (Optional) To further restrict this criterion by adding a history attribute to it, go to [Adding a History Attribute to Further Define the Segment](#).
- Add other criteria as necessary.
- From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

### 11.2.3.3.2 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 [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:

- 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, as shown in [Figure 11-17](#):

**Figure 11-17 Count for Purchase History**

- In the next row, select **A specific time period**, then specify the time period to use for the total from the two date fields.

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 shown in [Figure 11-18](#):

**Figure 11-18 Specific Time Period Entry for Purchase Summary**

3. (Optional) To further restrict this criterion by adding a history attribute to it, go to [Adding a History Attribute to Further Define the Segment](#).
4. Add other criteria as necessary.
5. From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

6. Do one of the following:
  - If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
  - If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).
  - If you selected Shopping Cart, go to [Define the Segment with Shopping Cart Criteria](#).

#### 11.2.3.3.3 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 [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, as shown in [Figure 11-19](#):

**Figure 11-19 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) To further restrict this criterion by adding a history attribute to it, go to [Adding a History Attribute to Further Define the Segment](#).
4. Add other criteria as necessary.
5. From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

6. Do one of the following:
  - If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
  - If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).
  - If you selected Shopping Cart, go to [Define the Segment with Shopping Cart Criteria](#).

#### 11.2.3.3.4 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 [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 shown in [Figure 11-20](#):

**Figure 11-20 Latest Date Recorded**

The screenshot shows a configuration form for a segment criterion. At the top, there is a text input field containing 'Purchase summary' and an eye icon to its right. To the right of this field is a checkbox labeled 'Exclude' with an 'X' icon. Below this, there is a dropdown menu labeled 'Latest date recorded' with a downward arrow. To the right of the dropdown is a text input field containing the date and time 'Aug 20, 2013 12:00:00 AM' and a calendar icon.

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) To further restrict this criterion by adding a history attribute to it, go to [Adding a History Attribute to Further Define the Segment](#).
4. Add other criteria as necessary.
5. From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

6. Do one of the following:

- If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
- If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).
- If you selected Shopping Cart, go to [Define the Segment with Shopping Cart Criteria](#).

#### 11.2.3.3.5 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**).

For help with this step, go to one of the following procedures:

- [Filtering Based on a Total](#)
- [Filtering Based on a Count](#)
- [Filtering Based on the First Time a History Definition Was Recorded](#)
- [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**, select the history attribute check box you want to use as a filter.

Typically this list includes items such as Product list, Store ID, Number of items, and Amount of sales. As a check box is selected, constraint fields that are meaningful for that attribute display. Clicking multiple attributes, or clicking an attribute multiple times, displays constraint fields each time an attribute is clicked.

3. Use the constraint fields to set the attribute values that further constrain the criterion.

[Figure 11-21](#) shows an example:

**Figure 11-21 Store ID Constraint Field**

The image shows a form with four items, each with a checkbox and a label. The first item, 'Store ID', has a checked checkbox and a dropdown menu showing the value '1'. The other three items, 'Product list', 'Amount of sales', and 'Number of items', have unchecked checkboxes.

4. Add other criteria as necessary.



5. From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

6. Do one of the following:

- If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
- If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).
- If you selected Shopping Cart, go to [Define the Segment with Shopping Cart Criteria](#).

#### 11.2.3.3.6 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**).

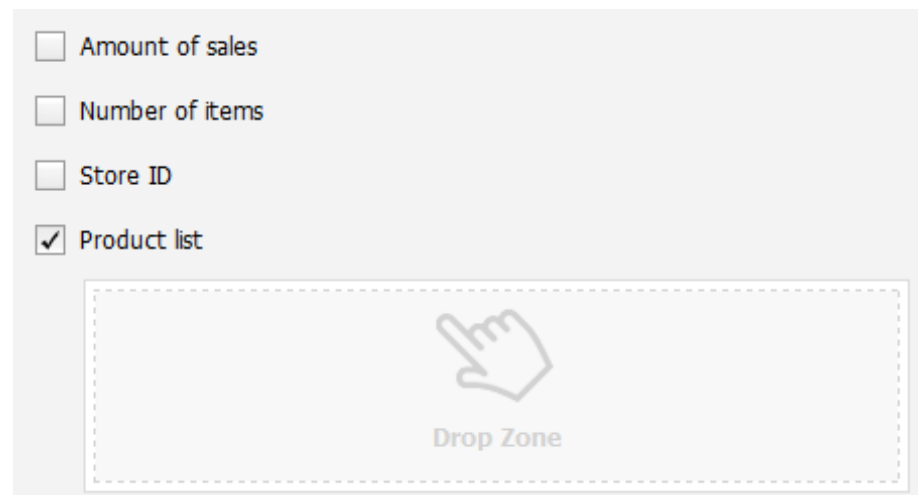
For help with this step, go to one of the following procedures:

- [Filtering Based on a Total](#)
- [Filtering Based on a Count](#)
- [Filtering Based on the First Time a History Definition Was Recorded](#)
- [Filtering Based on the Most Recent Time a History Definition Was Recorded](#)

2. Under the attribute list, select **Product list**.

The form opens a drop zone ([Figure 11-22](#)).

**Figure 11-22 Product List Displaying Drop Zone**



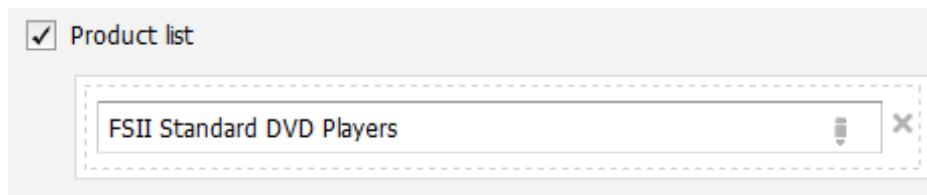
The screenshot shows a form with a list of attributes and a drop zone. The attributes are:

- Amount of sales
- Number of items
- Store ID
- Product list

Below the list is a dashed box labeled "Drop Zone" with a hand icon pointing to it.

- Use the **Content Tree** to select products and drag them to the drop zone (Figure 11-23).

**Figure 11-23 Product List With Products**



After you add products to the Product list, the criterion selects only those purchases made that include the selected products.

- From the menu bar, select **Content**, then select **Save**.  
The criterion is added to the segment and the segment is saved.
- Do one of the following:
  - If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
  - If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).
  - If you selected Shopping Cart, go to [Define the Segment with Shopping Cart Criteria](#).

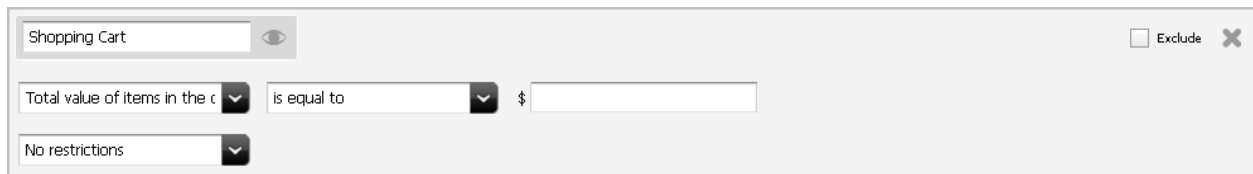
### 11.2.3.4 Define the Segment with Shopping Cart Criteria

To define the segment with shopping cart criteria:

- In the Filtering Criteria form, select the **Shopping Cart** category.

Engage displays the Shopping Cart criterion (Figure 11-24).

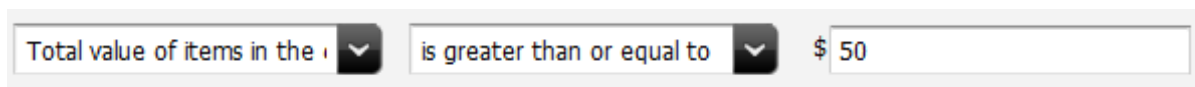
**Figure 11-24 Specific Time Period Entry for Purchase Summary**



- 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 shopping carts, set the values as shown in Figure 11-25:

**Figure 11-25 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 shown in [Figure 11-26](#):

**Figure 11-26 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** opens.

4. Drag and drop the product you want from the **Content Tree** into the **Drop Zone**.
5. Add other criteria as necessary.
6. From the menu bar, select **Content**, then select **Save**.

The criterion is added to the segment and the segment is saved.

7. Do one of the following:
  - If you selected a visitor attribute category, go to [Create Segment Filtering Criteria with Visitor Attributes](#).
  - If you selected a history definition category, go to [Create Segment Filtering Criteria with History Definitions](#).

## 11.2.4 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.

## 11.2.5 Previewing a Segment

When a segment is created and incorporated into the website, it can be useful to preview it. Previewing a segment 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. For instructions about previewing a segment, see [How Do I Preview Assets?](#)

## 11.2.6 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 [Performing Approval Tasks](#).

## 11.2.7 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 [Creating and Configuring Recommendations with Engage](#).

You can also create promotions after you have created segments. For more information, see [Creating Promotions](#).

## 11.3 Creating and Configuring Recommendations with Engage

This section describes Recommendations and provides instructions on creating and configuring them. 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.

### 11.3.1 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 [Confidence](#).

You create segments and then rate the flex assets for their importance to each segment. When a recommendation asset is called from a web 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 calls 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 calls 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 the recommendation is called by a template, it 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 calls 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 it as 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 [Table 11-1](#):

**Table 11-1 Types of Recommendation Assets**

Parameters	Static Lists (List Mode)	Static Lists (Recommendation Mode)	Dynamic Lists	Related Items
Ratings (by segment)	Yes	Yes	Yes	Yes

**Table 11-1 (Cont.) Types of Recommendation Assets**

Parameters	Static Lists (List Mode)	Static Lists (Recommendation Mode)	Dynamic Lists	Related Items
<b>Confidence (by segment)</b>	Determined by asset's position in the list; no segment distinction.	Yes	Yes	Yes
<b>Selection Criteria</b>	Highest only	Highest, Random	Highest, Random	Highest, Random
<b>Sort Order</b>	Descending by confidence only	Yes	Yes	Yes
<b>Options</b>	<ul style="list-style-type: none"> <li>• Can return the children of recommended assets</li> <li>• Can be overridden by promotions</li> <li>• Can apply to all or select asset types</li> </ul>	<ul style="list-style-type: none"> <li>• Can return the children of recommended assets</li> <li>• Can be overridden by promotions</li> <li>• Can apply to all or select asset types</li> </ul>	<ul style="list-style-type: none"> <li>• Can return the children of recommended assets</li> <li>• Can be overridden by promotions</li> <li>• Can apply to all or select asset types</li> </ul>	<ul style="list-style-type: none"> <li>• Can return the children of recommended assets</li> <li>• Can be overridden by promotions</li> <li>• Can apply to all or select asset types</li> </ul>
<b>Build</b>	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.

### 11.3.2 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 covers the following topics:

- [Ratings](#)
- [Confidence](#)
- [Selection Criteria](#)
- [Sort Criteria](#)

#### 11.3.2.1 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).

Flex assets and flex parents that are not assigned any of these specific ratings have a system default rating. 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 you should 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 ensure 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:

$$\text{Final rating} = \text{individual rating} + \text{inherited rating} / 2$$

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 multiple segments, 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.

### 11.3.2.2 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 through the recommendation's **New** or **Edit** forms.
- For Related Items recommendations, you manually assign confidence values to assets for each segment in the recommendation through 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**

Confidence is a scaling factor and 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 is not 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 multiple confidence values for the same recommendation, Engage uses the highest value (even if one of those values is 0); it does not average them.

#### **11.3.2.3 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.

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**Note:**

List mode Static Lists recommendations do not support the Random selection criterion.

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The method that you select for Selection Criteria determines how Engage selects assets from the database. The two Selection Criteria methods are:

- **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. Assets with higher ratings for the current segment are more likely 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 the following 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.

### 11.3.2.4 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.

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**Note:**

List mode Static Lists recommendations do not support the Random selection criterion.

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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.

### 11.3.3 Asset Recommendation Processes

The following section explains how Engage determines which assets to pass to the template for each type of recommendation.

This section covers the following topics:

- [Static Lists in List Mode](#)
- [Static Lists in Recommendation Mode](#)
- [Dynamic Lists](#)
- [Related Items](#)

#### 11.3.3.1 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 [Recommendation Assets](#) for this information). When a List mode Static Lists recommendation is called by a template, all assets in the list are always displayed in the order you specify within the Recommendation asset.

- If a template calls 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 calls 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,  $90 \times 0.75$ ).

- 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 about selection criteria, see [Selection Criteria](#).

### 11.3.3.2 Static Lists in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is called 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 calls 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 calls 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,  $90 \times 0.75$ ).
- 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 about selection criteria, see [Selection Criteria](#).

### 11.3.3.3 Dynamic Lists

When a Dynamic Lists recommendation is called 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 calls 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 calls 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.

#### 11.3.3.4 Related Items

In this example, a template that displays a product description for a Movie asset named Movie 123 calls 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.

### 11.3.4 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 covers the following topics:

- [Recommendation Development Overview](#)

- [Creating Static Lists Recommendations in List Mode](#)
- [Creating Static List Recommendations in Recommendation Mode](#)
- [Creating Dynamic Lists Recommendations](#)
- [Creating Related Items Recommendations](#)

#### 11.3.4.1 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 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.

[Configuring Assets to Be Recommended](#) describes how to assign ratings to assets and how to assign flex assets to flex parent assets by the relationships defined in a Related Items recommendation.

#### 11.3.4.2 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 [Recommendation Assets](#) for this information). When a List mode Static Lists recommendation is called by a template, all assets in the list are always 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, you should add the source asset(s) to your bookmarks for easy retrieval during the creation of the recommendation.

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**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.

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1. From the Contributor interface, select the site in which you want to create a Static Lists recommendation in List mode.

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). For instructions, see [Bookmarking Assets](#).
3. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

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 [Participating in Workflow](#).
- If the Recommendation asset opens in Web View, switch to Form View 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 **Content** section of the form opens first.

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**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.

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- 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 [Participating in Workflow](#).
  - If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.
4. In the **Content** section, fill in the following fields:
    - 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.
    - In the **Description** field, enter a brief description of the list.  
You can enter up to 128 alphanumeric characters.
    - 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 only option in the drop-down list is "(no subtype)." Consult your developers for information about available recommendation subtypes (if any).
    - 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 about recommendation templates.

- In the **Mode** field, select the **List** in the drop-down menu.
- In the **Start Date** and **End Date** fields, select a date range in which the asset will be displayed on the website.

For more information about start and end dates, see [About Start and End Dates](#).

- In the **Locale** field, select the asset's target language. For more information about locales, see [Working with Multilingual Assets](#).

5. Select the **Options** section of the form (Figure 11-27).  
Set the options appropriate for the list's intended purpose.

**Figure 11-27 Recommendation List Options**

The screenshot shows a web form with three tabs: 'Content', 'Options', and 'Detail'. The 'Options' tab is active. Below the tabs is a section titled 'Recommendation'. Under this section, there are three main areas:
 

- Options:** Three checkboxes are checked: 'Bring back children of returned assets.', 'Promotions can override this recommendation.', and 'This recommendation applies to all asset types.'
- Selection Criteria:** A dropdown menu is currently empty.
- Sort Criteria:** Two dropdown menus are present. The first is labeled '<Pick Type>' and the second is labeled '<Pick Attribute>'. To the right of these is a third dropdown menu set to 'Ascending'. Below these dropdowns is a button labeled 'Add Sort Criteria'.

If the **This recommendation applies to all asset types** check box is deselected, a menu opens from which you can select the asset types that the recommendation applies to.

In the **Selection Criteria** field (Figure 11-27), choose the selection criteria for the recommendation. For more information, see [Selection Criteria](#).

In the **Sort Criteria** field (Figure 11-27), do the following:

- 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 [Sort Criteria](#).
- 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 contains 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, select whether the sort direction should be ascending or descending.

- d. Click **Add Sort Criteria**.

Your criteria appear at the bottom of the form.

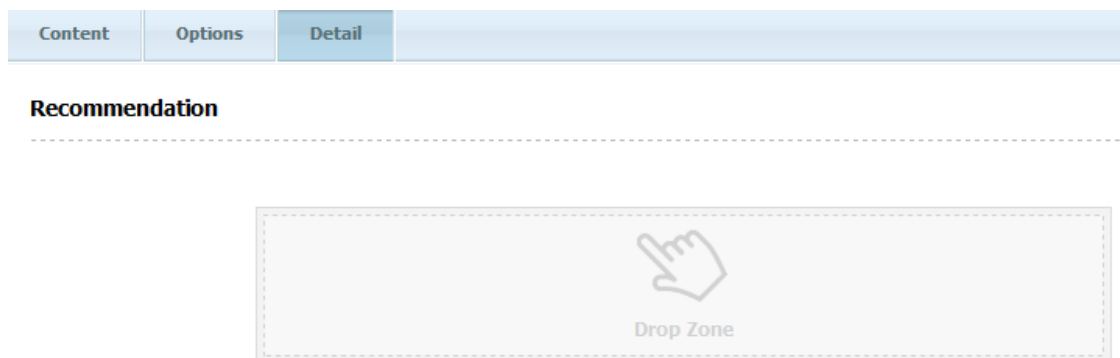
- e. (Optional) To add more sort criteria, repeat steps 5.a through 5.d.

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.

6. Select the **Detail** section to add information regarding lists.

If you set the **Mode** field to **List** in the **Content** section of the form, the **Detail** section displays a drop zone (Figure 11-28):

**Figure 11-28 Recommendation Detail Tab Drop Zone**



7. In the **Drop Zone**, add the assets 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 asset and then drag it and drop it into the field.

8. (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.

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

### 11.3.4.3 Creating Static List Recommendations in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is called 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 segment.
- If segments do not exist, you can create them (assuming you have the appropriate permissions). See [Grouping Visitors into Segments with Engage](#) for information about creating and configuring segments.
- You should know in advance the confidence values (in segment, out of segment, and when no segments apply) you want to 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:

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**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.

---



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1. From the Contributor interface, select the site in which you want to create a Static Lists recommendation in Recommendation mode (FirstSite II in this example).
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). For instructions, see [Bookmarking Assets](#).
3. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

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.

- a. 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 [Participating in Workflow](#).
- b. If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.

The tab opens 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 opens first.

---

**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 [Participating in Workflow](#).
  - If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.
4. In the Content section, fill in the following fields:
- 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.
  - In the **Description** field, enter a brief description of the recommendation.  
You can enter up to 128 alphanumeric characters.
  - 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 about available recommendation subtypes (if any).
  - 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 about creating templates for recommendations.

---

- In the **Mode** field, select **Recommendation** in the drop-down menu.
  - In the **Start Date** and **End Date** fields, select a date range in which the asset will be displayed on the website.  
For more information about start and end dates, see [About Start and End Dates](#).
  - In the **Locale** field, select the asset's target language. For more information about locales, see [Working with Multilingual Assets](#).
5. Select the **Options** section of the form ([Figure 11-29](#)).  
Set the options appropriate for the list's intended purpose.

**Figure 11-29 Recommendation Options Tab**

In the **Selection Criteria** field, select the selection criterion for the recommendation. For more information, see [Selection Criteria](#).

In the **Sort Criteria** field, 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 [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 contains 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, select whether the sort direction should be ascending or descending.

- d. Click **Add Sort Criteria**.

Your criteria is shown at the bottom of the form

- e. (Optional) To add more sort criteria, repeat steps a through 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

6. In the **Detail** section, do the following:

If you set the value of the Mode field to Recommendation in the Content section of the form, the **Detail** section displays two drop zones for static lists (Figure 11-30):

**Figure 11-30 Segment and Asset Drop Zones for Static Lists and Smart Lists**

The screenshot shows a form interface. At the top, there is a 'Type:' label followed by a dropdown menu currently showing 'Static Lists (optionally by segment)'. Below the dropdown is a dashed rectangular box labeled 'Segment Drop Zone'. Underneath that is a shaded gray area with the text 'If No Segments Apply' in bold. Inside this shaded area is another dashed rectangular box labeled 'Asset Drop Zone'.

7. In the **Segment Drop Zone**, add the assets 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 asset's name and then drag and drop it into the field.
8. 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 opens.  
For additional information, see [Confidence](#).
9. As you drag each segment into the Drop Zone, do the following:
  - Add as many segments as you want to include.
  - (Optional) Add assets to the **If No Segments Apply** category and assign confidence values as appropriate.

The completed form looks similar to the one shown in [Figure 11-31](#):

**Figure 11-31 Segments in a Recommendation**

Type:  ▼

**+** AffluentYoungSingles 🗑️

		In		Out	
Home (de)		50	%	50	% ✕
Home (fr)		75	%	25	% ✕

Asset Drop Zone

Segment Drop Zone

**If No Segments Apply**

Asset Drop Zone

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

### 11.3.4.4 Creating Dynamic Lists Recommendations

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**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. From the Contributor interface, select the site in which you want to create a Dynamic Lists recommendation (FirstSite II in this example).
2. In the menu bar, select **Content**, then select **New**, and then select **New Recommendation**.

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.

- a. 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 [Participating in Workflow](#).
- b. If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.

The tab opens the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Content** section of the form opens first.

---



---

**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 [Participating in Workflow](#).
  - If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.
3. In the **Content** section of the form, do the following:
- 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.
  - In the **Description** field, enter a brief description of the recommendation.  
You can enter up to 128 alphanumeric characters.
  - 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 about available recommendation subtypes (if any).
  - 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 about creating templates for recommendations.

---



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- In the **Mode** field, select the **Recommendation** in the drop-down menu.
- In the **Start Date** and **End Date** fields, select a date range in which the asset will be display on the website.  
For more information about Start and End dates, see [About Start and End Dates](#).
- In the **Locale** field, select the asset's target language. For more information about locales, see [Working with Multilingual Assets](#).

4. Select the **Options** section of the form (Figure 11-32).  
Set the options appropriate for the list's intended purpose.

**Figure 11-32 Recommendation Options Tab**

In the **Selection Criteria** field, choose the selection criterion for the recommendation. For more information, see [Selection Criteria](#).

In the **Sort Criteria** field, 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 [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 contains 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, select 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 the above steps.

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.

5. Select the **Detail** section of the form.



6. In the **Type** field, select either **Dynamic Lists (generated by an element)** or **Dynamic Lists (optionally by segment)**:
  - When selecting by element, a single **Drop Zone** opens ([Figure 11-33](#)).

**Figure 11-33 Segment and Asset Drop Zones for Dynamic Lists Recommendation**

Type:

Asset Drop Zone

- When selecting by segment, a **Segment Drop Zone** and an **Asset Drop Zone** (for assets that are not contained in a segment) open.
7. Do one of the following:
    - 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**.

When you have added each segment, it displays its own **Asset Drop Zone**.

8. Drag each asset you want to add to the segment 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 looks similar to the one shown in [Figure 11-34](#).

**Figure 11-34 Completed Drop Zone in the Recommendation Form**

Recommendation: ParkRec

In [Figure 11-34](#), the Segment Drop Zone contains the **AffluentYoungSingles** segment and a CSElement was placed below it in the **Asset Drop Zone**. The **If No Segments Apply** section contains a Content Query asset.

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

### 11.3.4.5 Creating Related Items Recommendations

To create a Related Items recommendation:

1. From the Contributor interface, select the site in which you want to create a Related Items recommendation.
2. In the menu bar, select **Content**, then select **New**, and then select **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**.
  - b. If the Recommendation asset opens in Web View, switch to Form View by clicking the **Mode** switch in the asset's toolbar.

The tab opens the Recommendation form. Notice the names of the form's sections near the top. When you create a new Recommendation asset, the **Content** section of the form opens first.

3. In the **Content** section of the form, do the following:
  - 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.

- In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
- 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 about available recommendation subtypes (if any).
- 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 about creating templates for recommendations.

- In the **Mode** field, select the **Recommendation** in the drop-down menu.
  - In the **Start Date** and **End Date** fields, select a date range in which the asset will be displayed on the website. For more information about start and end dates, see [About Start and End Dates](#).
  - In the **Locale** field, select the asset's target language. For more information about locales, see [Working with Multilingual Assets](#).
4. Select the **Options** section ([Figure 11-35](#)). Set the options appropriate for the list's intended purpose.

**Figure 11-35 Recommendation Options Tab**

The screenshot shows the 'Options' tab of a 'Recommendation' configuration page. At the top, there are three tabs: 'Content', 'Options' (which is active), and 'Detail'. Below the tabs, the page is titled 'Recommendation'. Underneath, there are three checked checkboxes with the following labels: 'Bring back children of returned assets.', 'Promotions can override this recommendation.', and 'This recommendation applies to all asset types.'. Below the checkboxes, there are three sections: 'Selection Criteria' with a dropdown menu, 'Sort Criteria' with two dropdown menus (one for '<Pick Type>' and one for '<Pick Attribute>') and a third dropdown menu set to 'Ascending', and an 'Add Sort Criteria' button.

In the **Selection Criteria** field, choose the selection criterion for the recommendation. For more information, see [Selection Criteria](#).

In the **Sort Criteria** field, 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 [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 contains 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 the above steps.

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.

5. In the **Detail** section, 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.

6. Edit the asset forms.

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

This recommendation is now shown 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 [Configuring Asset Relationships Using Related Items Recommendations](#).

### 11.3.5 Editing Recommendation Assets

To edit a Recommendation asset:

1. From the Contributor interface, select the site containing the Recommendation asset you want to edit (FirstSite II in this example).
2. Find and open the Recommendation asset you want to edit:
  - a. In the **Search** field, enter your search criteria (if any).

- b. To narrow your search down to a specific type of asset, in the **Search** field, click the down-arrow to render the **Search Type** drop-down box, and select the asset type to which you want to limit your search.
- c. Click the **magnifying glass** button.
- d. In the search results list, right-click the asset and select **Edit** from the context menu.

---



---

**Note:**

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 about searching, see [Finding and Organizing Assets](#).

---



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The asset opens in its Edit view.

3. Make your changes to the Recommendation asset.  
All fields on all tabs are available to modify.
4. Save the asset, by clicking the **Save** icon, or selecting **Content** from the menu bar, then **Save**.

## 11.3.6 Configuring Assets to Be Recommended

The next step is to configure the segment ratings and asset relationships for the assets you want to promote using recommendations. Specifically, you have to use the flex asset and flex parent asset forms in the Contributor interface to do the following:

- Rate how important the assets and parent assets are to the members of each segment. See [Assigning Ratings to an Asset](#).
- Configure the asset relationships that are represented by the Related Items recommendations. See [Configuring Asset Relationships Using Related Items Recommendations](#).

---



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**Note:**

Typically, business users configure assets to be recommended.

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### 11.3.6.1 Assigning Ratings to an Asset

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

- To easily manage the ratings for multiple assets, those assets should reside in groups. In fact, you should create flex parents whose sole purpose is to assign ratings to child assets. You can make all of the assets that have identical rating conditions children of the same parent. Then, you can modify the ratings for all the child assets by making a single change.
- Comparing the ratings for one group of assets to the ratings of another group is easier than comparing the ratings of individual assets.
- Ratings are calculated more quickly because fewer assets with individual ratings exist; this speeds up system performance.

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, the 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, an asset rated at lower than the system default rating will probably never be recommended to a site visitor.

To assign ratings to an asset:

1. From the Contributor interface, select the site containing the asset to which you want to assign ratings (FirstSite II in this example).
2. Find the flex asset or flex parent you want to assign ratings to and open its Edit view:
  - a. In the **Search** field, enter your search criteria (if any).
  - b. To narrow your search down to a specific type of asset, in the **Search** field, click the **down-arrow** to render the **Search Type** drop-down box, then select the asset type to which you want to limit your search.
  - c. Click the **magnifying glass** button.
  - d. In the search results list, right-click the asset and select **Edit**.

For more information about searching, see [Finding and Organizing Assets](#).

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

This field lists all the segments that have been created for this site (as shown in [Figure 11-36](#)).

**Figure 11-36 Segment Ratings for an Asset**

Ratings:

Segment	In Segment	Out of Segment
AffluentYoungSingles	<input type="text"/>	<input type="text"/>
No segment ratings apply: <input type="text"/>		

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 [Ratings](#).

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

### 11.3.6.2 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. From the Contributor interface, select the site containing the assets between which you want to configure a relationship.
2. Before you work with the flex parent asset which has Related Items relationship(s) you want to configure, find and bookmark the assets that you want to put in these relationships.

Bookmarked assets are available in the **Bookmarks** node in the **My Work** tree.

- a. In the **Search** field, enter your search criteria (if any).
  - b. To narrow your search down to a specific type of asset, in the **Search** field, click the down-arrow to render the **Search Type** drop-down box, then select the asset type to which you want to limit your search.
  - c. Click the **magnifying glass** button.
  - d. In the search results list, select (Ctrl+click) the assets you wish to bookmark, and in the **Search** tab's toolbar, click the **Bookmark** icon.
3. Find the flex parent that has the Related Items relationship(s) you want to configure and open its Edit form:
    - a. In the **Search** field, enter your search criteria (if any).
    - b. To narrow your search down to a specific type of asset, in the **Search** field, click the down-arrow to render the Search Type drop-down box, then select the asset type to which you want to limit your search.
    - c. Click the **magnifying glass** button.
    - d. In the search results list, right-click the asset and select **Edit** from the context menu.

For more information about searching, see [Finding and Organizing Assets](#).

4. In the parent asset's Edit form, scroll to the **Related Items** section.

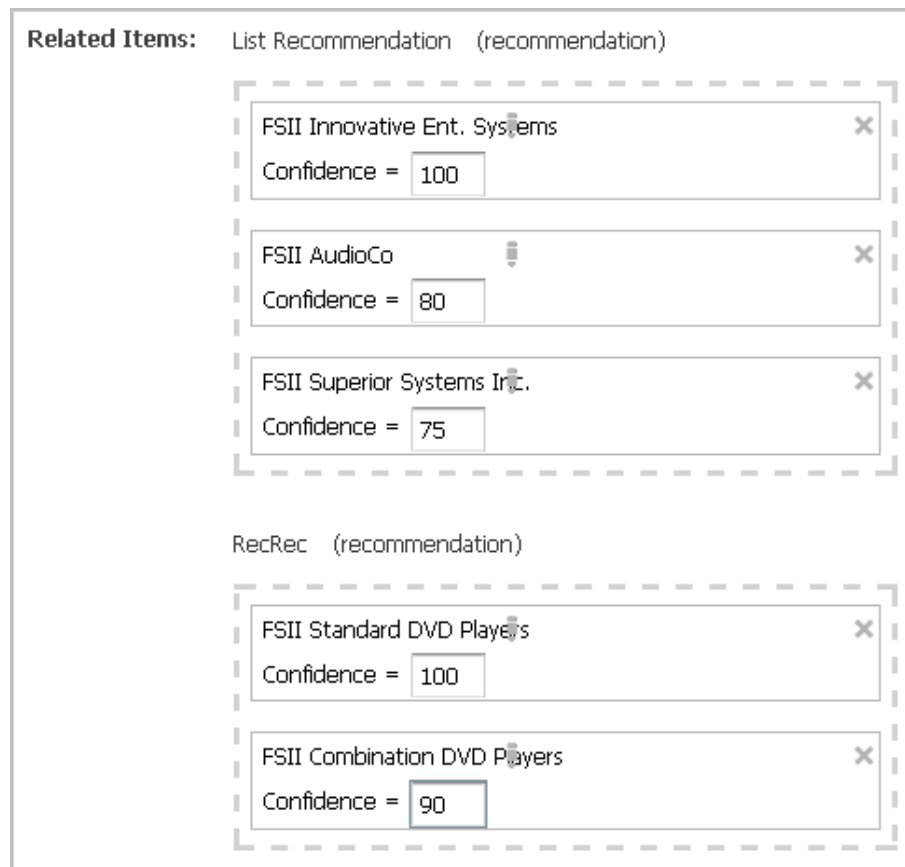
**Note:**

The **Related Items** section is only available if you have created a Related Items type of Recommendation that specifies the asset type of the asset you want to add. For more information, see [Creating Related Items Recommendations](#).

- In the tree, open the **Bookmarks** node on the **My Work** tree, then drag and drop the flex asset or flex parent into the appropriate recommendation's **Drop Zone**.

Engage lists the assets under the recommendation, as shown in [Figure 11-37](#).

**Figure 11-37 Assets Listed as Related Items**



- 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 about confidence, see [Confidence](#).

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

### 11.3.7 Verifying Recommendation Assets

To verify that you configured your recommendation assets correctly, complete the following tasks as a complete exercise:



1. Create some test segments (see [Grouping Visitors into Segments with Engage](#) for information about creating segments).
2. In the flex asset and flex parent asset forms (for example, Product and Product Parent), assign ratings for the segments.
3. Browse your site as a visitor and register yourself so that you qualify for the test segment.
4. Examine the items that the recommendation assets return.
5. If you find problems, ask your developers to write test pages that isolate the problem.

### 11.3.8 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 [Performing Approval Tasks](#).

## 11.4 Creating Promotions

This chapter describes how promotions work and how to create them. 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 section includes the following topics:

- [About Promotions](#)
- [Creating Promotions](#)
- [Sample Promotion Asset](#)
- [Publishing Promotions](#)

### 11.4.1 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 one or more 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.

#### 11.4.1.1 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 any promotions should override the recommendation. If so, it passes the promotion back to the recommendation's template and the template displays the promotion instead.

#### 11.4.1.2 When Promotions Overlap

Multiple promotions can use the same recommendation. What happens, then, when a visitor qualifies for multiple promotions and those promotions are using the same recommendation? Take a look at the following example:

##### Example: Overlapping Promotions

Two promotions both override the same recommendation, as shown in [Table 11-2](#) and [Table 11-3](#):

**Table 11-2 End Of Summer Sale Promotion**

<b>Name:</b>	End-of-Summer Sale
<b>Discount:</b>	10% off the entire contents of the visitor's shopping cart
<b>Segments it applies to:</b>	All segments

**Table 11-3 Printer Sale Promotion**

<b>Name:</b>	Printer Sale
<b>Discount:</b>	30% off all printers
<b>Segments it applies to:</b>	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 11-4](#)):

**Table 11-4 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 11-5](#)):

**Table 11-5 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 promotion 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.

## 11.4.2 Creating Promotions

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 covers the following topics:

- [Name and Define the Promotion](#)
- [Define the Goals for the Promotion](#)
- [Define Which Visitors Are Eligible for the Promotion](#)

- [Define the Discount](#)
- [Define the Promotion's Duration](#)
- [Advertise the Promotion on Your Site](#)

#### 11.4.2.1 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.

---

---

To name and define the promotion:

1. From the Contributor interface, select the site in which you want to create a Promotion (FirstSite II in this example).
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.

3. 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 [Participating in 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 shown in [Figure 11-38](#):

Figure 11-38 Creating a Promotion Asset

## Promotion

**Name** ▶ **Goals** ▶ **Segments** ▶ **Discount** ▶ **Duration** ▶ **Display**

## Name &amp; Description

\*Name:

Description:

Start Date:



End Date:

**Continue**Assignees have been selected. ([Details](#))**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.

4. 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 about Start and End dates, see [About Start and End Dates](#).
  - d. Click **Continue**.  
The tab opens the **Goals** section of the Promotion form, as shown in [Define the Goals for the Promotion](#).

**Note:**

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.

### 11.4.2.2 Define the Goals for the Promotion

Figure 11-39 shows the **Goals** section of the Promotion form.

**Figure 11-39 Promotion Goals**

Promotion: Winter promotion

▶ Name   **Goals**   ▶ Segments   ▶ Discount   ▶ Duration   ▶ Display

#### Goals

Optionally, enter in your goals for this promotion. This information will be included in the Promotion Summary.

1.
2.
3.

**Continue**

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 necessary.
3. Click **Continue**.

The tab opens the **Segments** section of the Promotion form, as shown in [Define Which Visitors Are Eligible for the Promotion](#).

### 11.4.2.3 Define Which Visitors Are Eligible for the Promotion

Use the **Segments** section of the Promotion form ([Figure 11-40](#)) 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 11-40 Promotion Segments

Promotion: Winter promotion

▸Name   ▸Goals   **Segments**   ▸Discount   ▸Duration   ▸Display

**Segments**

Apply to all visitors

Apply to the selected segments:

Segment Name	Description
<input type="checkbox"/> AffluentYoungSingles	AffluentYoungSingles

**Continue**

1. Do one of the following:
  - 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) To create a new segment for the promotion, complete the following steps:
  - a. Create a new segment.  
For help with this step, see [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 opens the **Discount** section of the Promotion form, as shown in [Define the Discount](#).

#### 11.4.2.4 Define the Discount

[Figure 11-41](#) shows the **Discount** section of the Promotion form.

**Figure 11-41 Promotion Discount Definition**

**Promotion: Winter promotion**

---

[Name](#)
[Goals](#)
[Segments](#)
[Discount](#)
[Duration](#)
[Display](#)

**Discount Value**

Purchases:

No Discount  
  :  off the promoted products  
 Every product in the catalog  
 Specific item(s) from the tree or docked search. (Drag items from the tree or docked search in to the drop zone.):

Describe purchase discount for display on invoices or receipts:

---

Shipping Fees:

off shipping fees  
 Describe shipping fee discount for display on invoices or receipts:

---

Store ID is

**Continue**

**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 [Define the Segment with Shopping Cart Criteria](#).

To define the discount, see the following sections:

- [Discounting the Entire Shopping Cart](#)
- [Discounting Specific Products](#)
- [Discounting the Shipping Costs](#)
- [Specifying a Store](#)

You can combine either of the first two options with the third option, but you cannot combine the first two options.

**11.4.2.4.1 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 shown in [Figure 11-42](#):



**Figure 11-42 Purchase Discount as a Fixed Value**

Purchases:

No Discount

5 : dollars off the promoted products

To offer 10% off, set the values as shown in [Figure 11-43](#):

**Figure 11-43 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 shown 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. Click **Continue** or go to [Discounting the Shipping Costs](#).

#### 11.4.2.4.2 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 shown in [Figure 11-44](#):

**Figure 11-44 Purchase Discount as a Fixed Value**

Purchases:

No Discount

5 : dollars off the promoted products

When adding a purchase discount as a fixed value to an item, be aware that the discount applies only once regardless of the number of items. In this example, a \$5.00 discount is set for a product, but the discount will be \$5 if the customer buys three items, not \$15. The discount is not multiplied by the quantity set when checking out.

To offer 10% off, set the values as shown in [Figure 11-45](#):

**Figure 11-45 Purchase Discount as a Percentage**

Purchases:

No Discount

10 : percent off the promoted products

2. Select the products that the discount applies to:

- 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 shown 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. Click **Continue** or go to the procedure described in [Discounting the Shipping Costs](#).

#### 11.4.2.4.3 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 shown in [Figure 11-46](#):

**Figure 11-46 Promotion Shipping Fees**

Shipping Fees:

15 percent off 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 shown 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, as shown in [Figure 11-47](#):

**Figure 11-47 Promotion Shipping Description**

Describe shipping fee discount for display on invoices or receipts: 15% off shipping

3. Click **Continue** or go to the procedure described in [Discounting the Shipping Costs](#).

#### 11.4.2.4.4 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. In the Store ID field ([Figure 11-48](#)), set the values that define the store discount.

**Figure 11-48 Promotion Store ID**

Store ID is 0

2. Click **Continue**.

The tab opens the **Duration** section of the Promotion form, as shown in [Define the Promotion's Duration](#).

### 11.4.2.5 Define the Promotion's Duration

[Figure 11-49](#) shows the **Duration** section of the Promotion form.

**Figure 11-49** Promotion Duration

The screenshot shows the 'Duration' section of a promotion form for 'Winter promotion'. At the top, there are tabs for 'Name', 'Goals', 'Segments', 'Discount', 'Duration' (which is active), and 'Display'. Below the tabs, the 'Duration' section is titled. It contains two main input areas: 'Specify a start date:' and 'Specify an end date:'. The start date is set to '2013 May 29 at 8:32 PM +00.00'. The end date section has three radio button options: 'Apply until cancelled' (which is selected), 'Apply for' (with a text box and a 'days' dropdown), and 'Apply until:' (with a date and time input). A 'Continue' button is located at the bottom left of the form.

---

**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 you want the promotion to end.

Do one of the following:

- If you want the promotion to run until you delete it or you want to 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 previously, click **Apply for**.  
Enter a whole number (not a fraction or decimal) in the text box and select 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 on which you want it to end.

The current date and time are displayed by default.

### 3. Click **Continue**.

The **Display** section of the Promotion form opens, as shown in [Advertise the Promotion on Your Site](#).

#### 11.4.2.6 Advertise the Promotion on Your Site

Figure 11-50 shows the **Display** section of the Promotion form.

**Figure 11-50 Display Section of Promotion Form**

**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 your search criteria (if any) and click the **magnifying glass** button.
  - b. (Optional) To narrow your search down to a specific type of asset, in the **Search** field, click the down-arrow to render the **Search Type** drop-down box, then select the asset type to which you want to limit your search.
  - c. In the search results list, either drag and drop the results to the drop zone, or select (**Ctrl+click**) the assets you want to bookmark.

For more information about searching for and bookmarking assets, see [Finding and Organizing Assets](#).

2. If you selected to bookmark assets from the search results, drag and drop the asset 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 placed.

**Note:**

If you select multiple assets, when the promotion is shown on your web 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 multiple segment, you can use segment-specific ad banners for the promotion.

When 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, as shown in [Figure 11-51](#):

**Figure 11-51 Promotion Recommendations**

3. In the **Pick recommendation** field next to the first item, select the name of the recommendation you want to replace or override with this item.  
(The recommendation provides the location for the text you selected previously.)
4. Repeat step 3 for each item that you selected in step 2.
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**.

### 11.4.3 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.

### 11.4.4 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 publishing it. 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 [Performing Approval Tasks](#).



# Part IV

---

## Reference

This part contains reference information useful to users of Oracle WebCenter Sites.

This part contains the following chapters:

- [Navigational Reference](#)
- [Keyboard Shortcuts for the Contributor Interface](#)





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## Navigational Reference

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

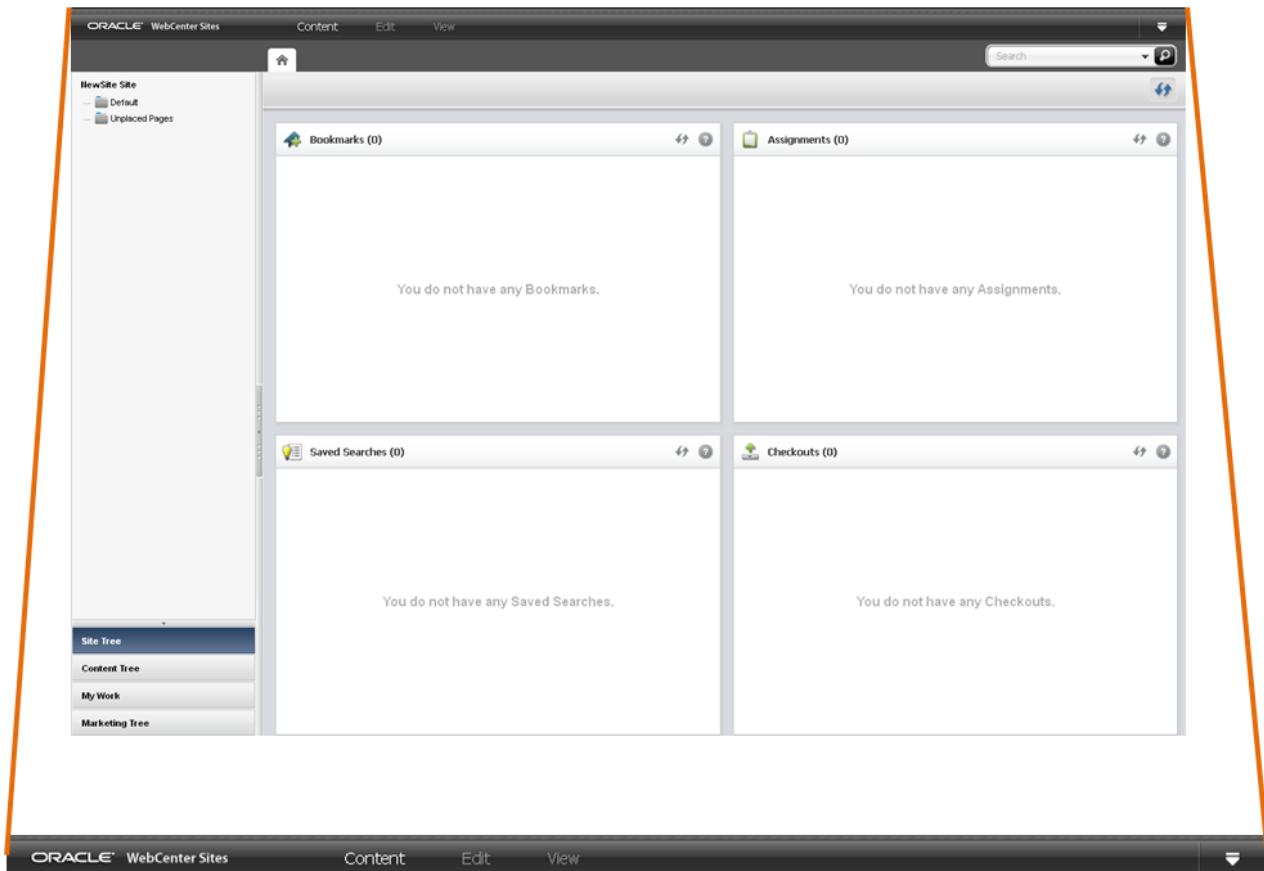
For information about the most commonly used components of the Oracle WebCenter Sites: Contributor interface, see these topics:

- [Menu Bar](#)
- [Navigation Pane](#)
- [Workspace: Home Tab](#)
- [Workspace: Asset Tab](#)
- [Search and Browse Tabs](#)
- [Split View: Asset Tab and Search Results List](#)
- [Icons](#)

### 12.1 Menu Bar

[Figure 12-1](#) shows the Contributor interface and points out the menu bar.

Figure 12-1 Menu Bar



The menu bar contains the following options:

- **Content** –Opens a menu containing options to manage the assets you are currently working with. These include the options for creating an asset, saving an asset, approving an asset for publishing, bookmarking an asset, sharing an asset to another site, and setting access permissions for a specific asset.
- **Edit** –Opens a menu containing content management tools to inspect, modify, copy, and delete an asset. This menu also allows you to change the layout (template) assigned to an asset and work with revision tracking.
- **View** –Opens a menu containing tools to view an asset in either Form View or Web View and options for previewing an asset in different ways, such as previewing an asset using a different layout (template) or site wrapper, or previewing an asset in a separate browser window. This menu also contains an option to view an asset's status summary form, which contains information about the asset's workflow and approval status.
- **Down-arrow icon** –Click this icon to open the applications bar. When you first log in to WebCenter Sites, the applications bar is open, in which case you see an **up-arrow** icon which you can click to close the applications bar. The applications bar contains the following:
  - Up to five of your most recently used applications. You can switch to a different application for which you have permissions without having to log back in to WebCenter Sites.

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

- Your **user name**, which you can click to manage your profile.
- **Sites** drop-down menu, which enables you to switch to a different site to which you have permissions.
- **Logout** button, which ends your session and logs you out of WebCenter Sites.

## 12.2 Navigation Pane

Figure 12-2 shows the navigation pane that is located on the left of the Contributor interface.

---



---

### Note:

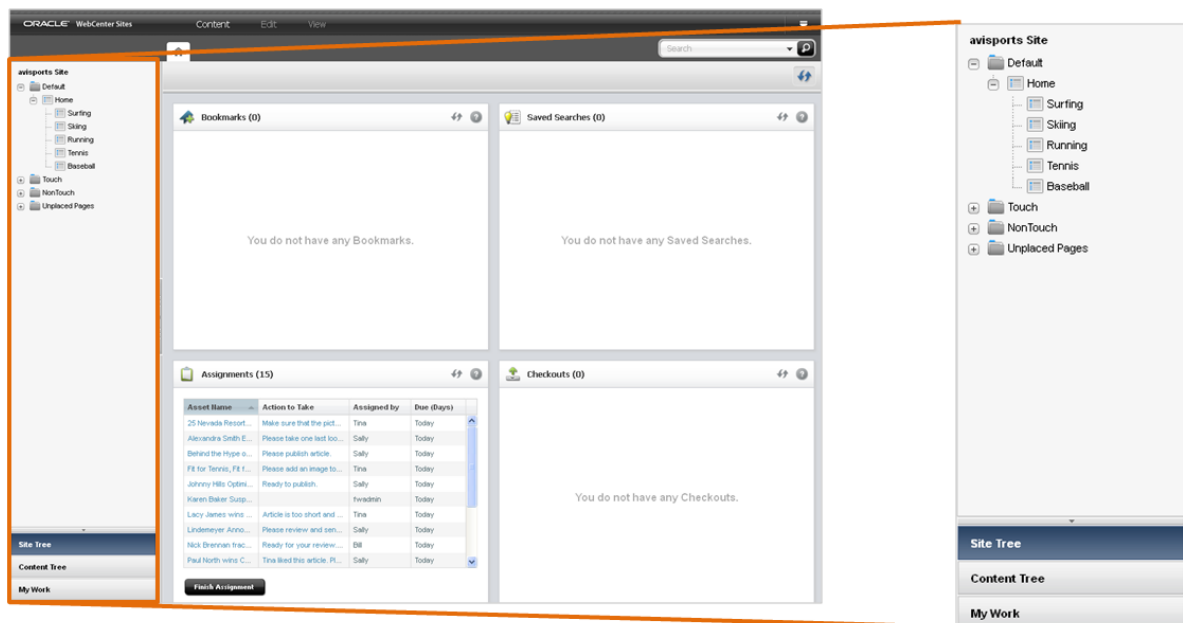
Drag the right edge of the navigation pane to adjust the pane's width. To hide the navigation pane, click the **Hide Tree Navigation** bar, located on the right edge of the navigation pane.

---



---

Figure 12-2 Navigation Pane



The navigation pane contains the following sections:

- **Site Tree:** Provides a hierarchical view of the way the pages on your websites are organized. Pages can be placed in a hierarchy under a site plan (which represents the navigation of a website) or *unplaced* (the page is not part of a site plan). There can be multiple site plans contained within a single CM site. For instructions on placing pages in a site plan and unplacing pages (removing pages from a site plan), see [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 [Assigning a Parent Asset to a Child Asset](#).

- **My Work** tree: Allows you to keep track of your workload. The My Work tree contains the **Bookmarks** and **History** nodes, as follows:
  - **Bookmarks**: Returns a list of assets that you have bookmarked. Bookmarked assets are also listed in the **Bookmarks** widget on the dashboard (located in the **Home** tab). For instructions on bookmarking assets, see [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.

---

---

**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.

---

---

## 12.3 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 12-3](#).

---

---

**Note:**

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

---

---

Figure 12-3 Home Tab (Dashboard)

The dashboard displays four widgets in a 2x2 grid:

- Bookmarks widget:** A table listing bookmarked assets with columns for Asset Name, Asset Type, and Bookmarked on. Assets include '25 Nevada Resorts Serving Snow', 'Alexandra Smith Ends World Cup Lead', and others.
- Saved Searches widget:** A form for creating or editing saved searches, including a Name field and a Share Status dropdown.
- Assignments widget:** A table listing assignments with columns for Asset Name, Action to Take, Assigned by, and Due (Days). Assignments include tasks like 'Make sure that the picture associated with this article has more pixels' and 'Please publish article'.
- Checkouts widget:** A table listing checked-out assets with columns for Asset Name, Asset Type, and Days Checked out. Assets include '25 Nevada Resorts Serving Snow', 'Alexandra Smith Ends World Cup Lead', and others.

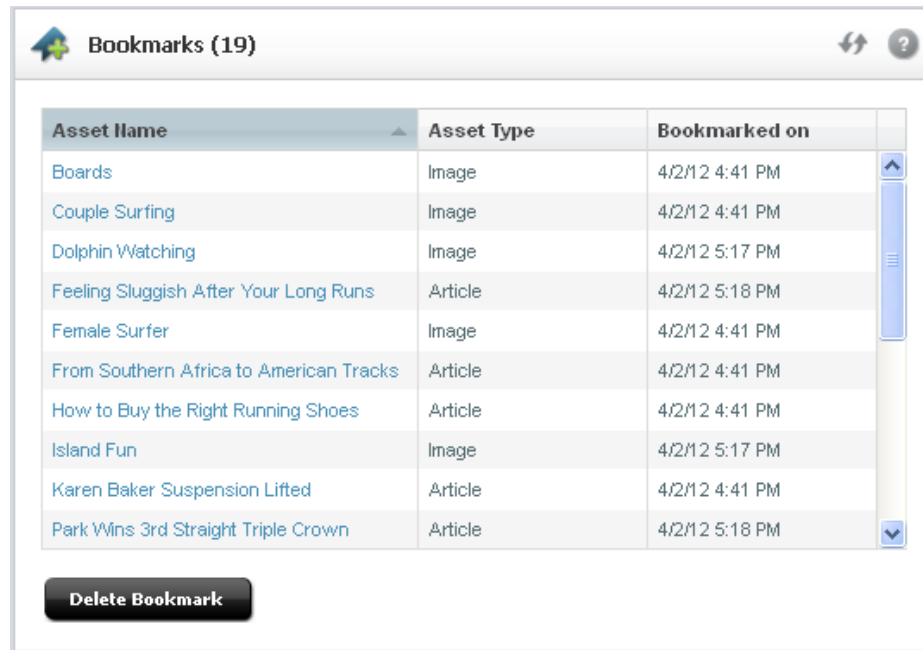
The dashboard may look different from user to user. This is because your dashboard only displays information pertaining to you. You can even reposition the widgets on your dashboard by dragging and dropping the widgets into a different location on the dashboard. The following provides information about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

- **Bookmarks** –When you bookmark an asset for easy retrieval at a future time, the asset is accessible from this widget. Bookmarked assets are also accessible from the **Bookmarks** node in the **My Work** tree.
- **Saved Searches** –A Saved Search is search criteria that you have saved to use on a later date. This widget lists all of the search criteria you have saved as a Saved Search and all of the Saved Searches other WebCenter Sites users have shared with the role(s) you are assigned.
- **Assignments** –Provides a summary of your present workload in the current site. From this widget you can access an asset that has been assigned to you during its workflow process and finish your assignments.
- **Checkouts** –Provides a summary of the assets that are presently checked out to you.

## 12.3.1 Bookmarks Widget

Bookmarking assets enables you to quickly access those assets at a future time. Bookmarked assets are listed in the **Bookmarks** widget (shown in [Figure 12-4](#)) and under the **Bookmarks** node in the **My Work** tree.

**Figure 12-4 Bookmarks Widget**



The screenshot shows a widget titled "Bookmarks (19)" with a refresh icon and a help icon. Below the title is a table with three columns: "Asset Name", "Asset Type", and "Bookmarked on". The table contains ten rows of bookmarked assets. Below the table is a "Delete Bookmark" button.

Asset Name	Asset Type	Bookmarked on
<a href="#">Boards</a>	Image	4/2/12 4:41 PM
<a href="#">Couple Surfing</a>	Image	4/2/12 4:41 PM
<a href="#">Dolphin Watching</a>	Image	4/2/12 5:17 PM
<a href="#">Feeling Sluggish After Your Long Runs</a>	Article	4/2/12 5:18 PM
<a href="#">Female Surfer</a>	Image	4/2/12 4:41 PM
<a href="#">From Southern Africa to American Tracks</a>	Article	4/2/12 4:41 PM
<a href="#">How to Buy the Right Running Shoes</a>	Article	4/2/12 4:41 PM
<a href="#">Island Fun</a>	Image	4/2/12 5:17 PM
<a href="#">Karen Baker Suspension Lifted</a>	Article	4/2/12 4:41 PM
<a href="#">Park Wins 3rd Straight Triple Crown</a>	Article	4/2/12 5:18 PM

**Delete Bookmark**

You can access a bookmarked asset by clicking the asset's name in the **Bookmarks** widget. Deleting a bookmarked asset removes it from the **Bookmarks** widget and from the **My Work** tree.

For more information about bookmarking assets, see [Bookmarking Assets](#).

## 12.3.2 Saved Searches Widget

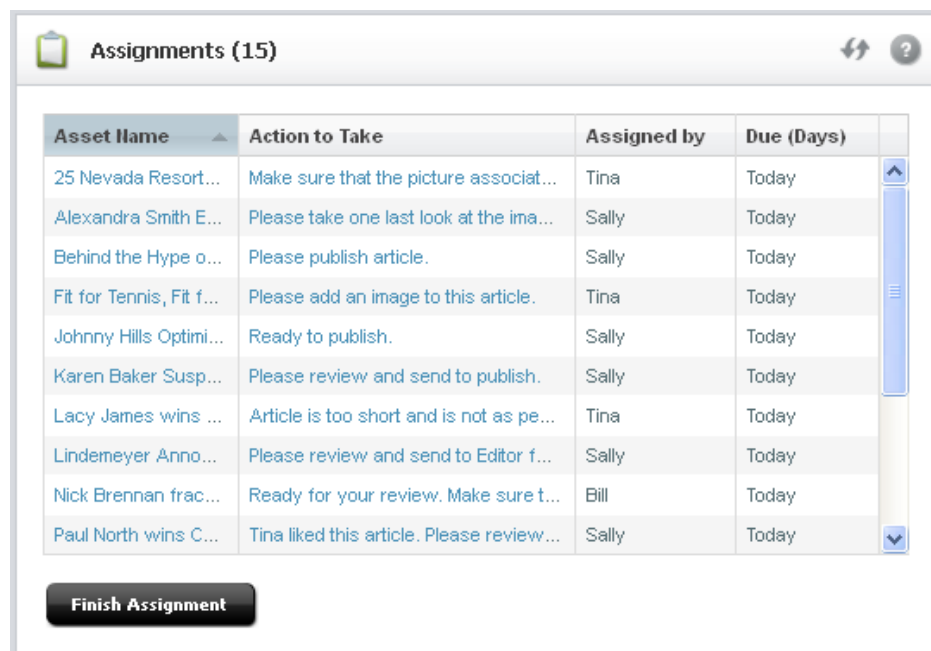
You create a Saved Search by conducting a search and then saving the search criteria you used to render the results of that search. Saved search criteria is automatically made accessible in the **Saved Searches** widget ([Figure 12-5](#)). If another WebCenter Sites user saved their search criteria as a Saved Search and shared it to one or more of your assigned roles, you see that Saved search listed in your **Saved Searches** widget.

**Figure 12-5 Saved Searches Widget**

For more information about Saved Searches, see [Saving Your Search Criteria to Your "Saved Searches" Widget](#).

### 12.3.3 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 12-6](#):

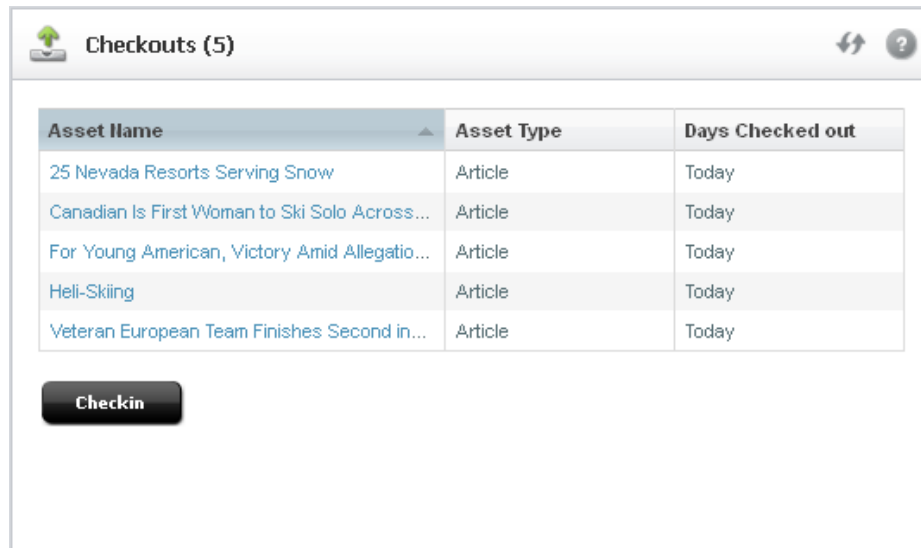
**Figure 12-6 Assignments Widget**

In the **Assignments** widget, you can work with an asset that has been assigned to you and finish an assignment to pass it through to the next step in the workflow process. For more information about workflow, see [Participating in Workflow](#).

### 12.3.4 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 12-7](#):

**Figure 12-7 Checkouts Widget**



Asset Name	Asset Type	Days Checked out
25 Nevada Resorts Serving Snow	Article	Today
Canadian Is First Woman to Ski Solo Across...	Article	Today
For Young American, Victory Amid Allegatio...	Article	Today
Heli-Skiing	Article	Today
Veteran European Team Finishes Second in...	Article	Today

Checkin

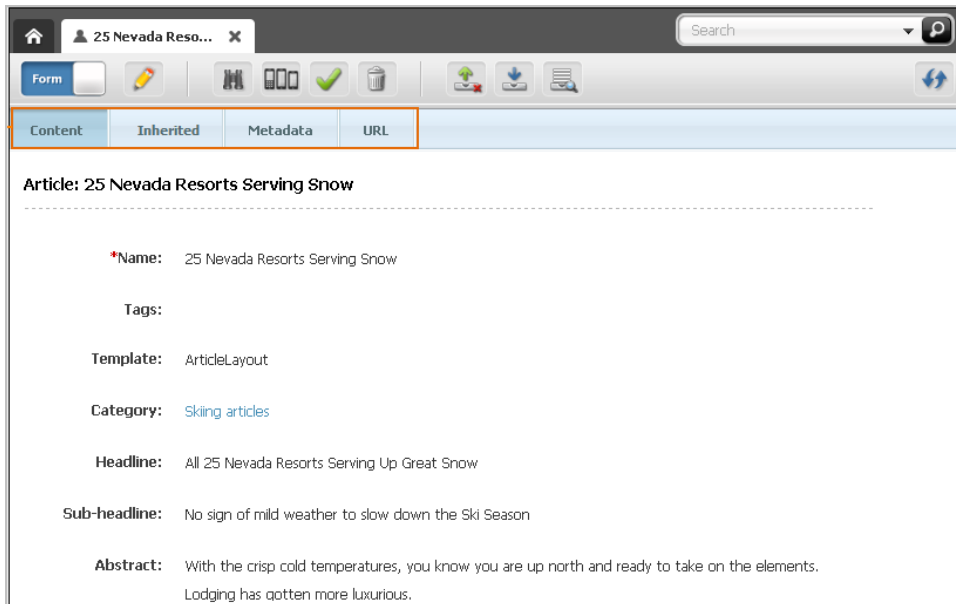
For more information about revision tracking, see [Revision Tracking](#).

## 12.4 Workspace: Asset Tab

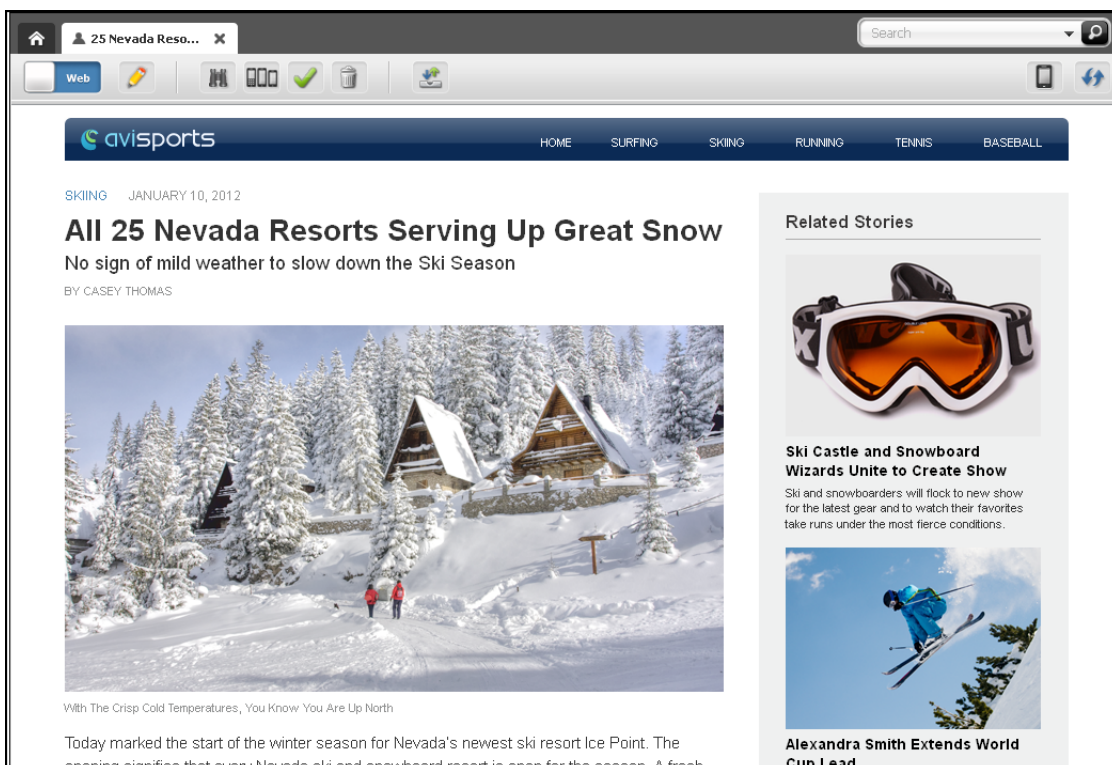
When you log in and access an asset, a tab opens in the workspace displaying the asset in either Form View or Web View. Depending on whether you are creating, editing, or inspecting the asset determines the view in which the tab displays the asset. The workspace has no limit to the number of tabs that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

- [Figure 12-8](#) shows an **Asset** tab displaying the Inspect view of an asset in Form View.



**Figure 12-8 Asset Displayed in Form View**

- [Figure 12-9](#) shows an **Asset** tab displaying the **Inspect** view of an asset in **Web View**.

**Figure 12-9 Asset Displayed in Web View**

## 12.4.1 Asset Toolbar

The asset toolbar is available in both Form View and Web View 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.

## 12.4.2 Form Section Selector

When you work with an asset in Form View, the tab displays the content entry form of that asset. An asset's form is divided into sections, accessible through the form section selector. Your administrator has the ability to customize asset forms (and their individual sections) on your site, and grant or deny you permissions to access specific form sections.

[Table 12-1](#) lists the form sections available by default in a WebCenter Sites implementation.

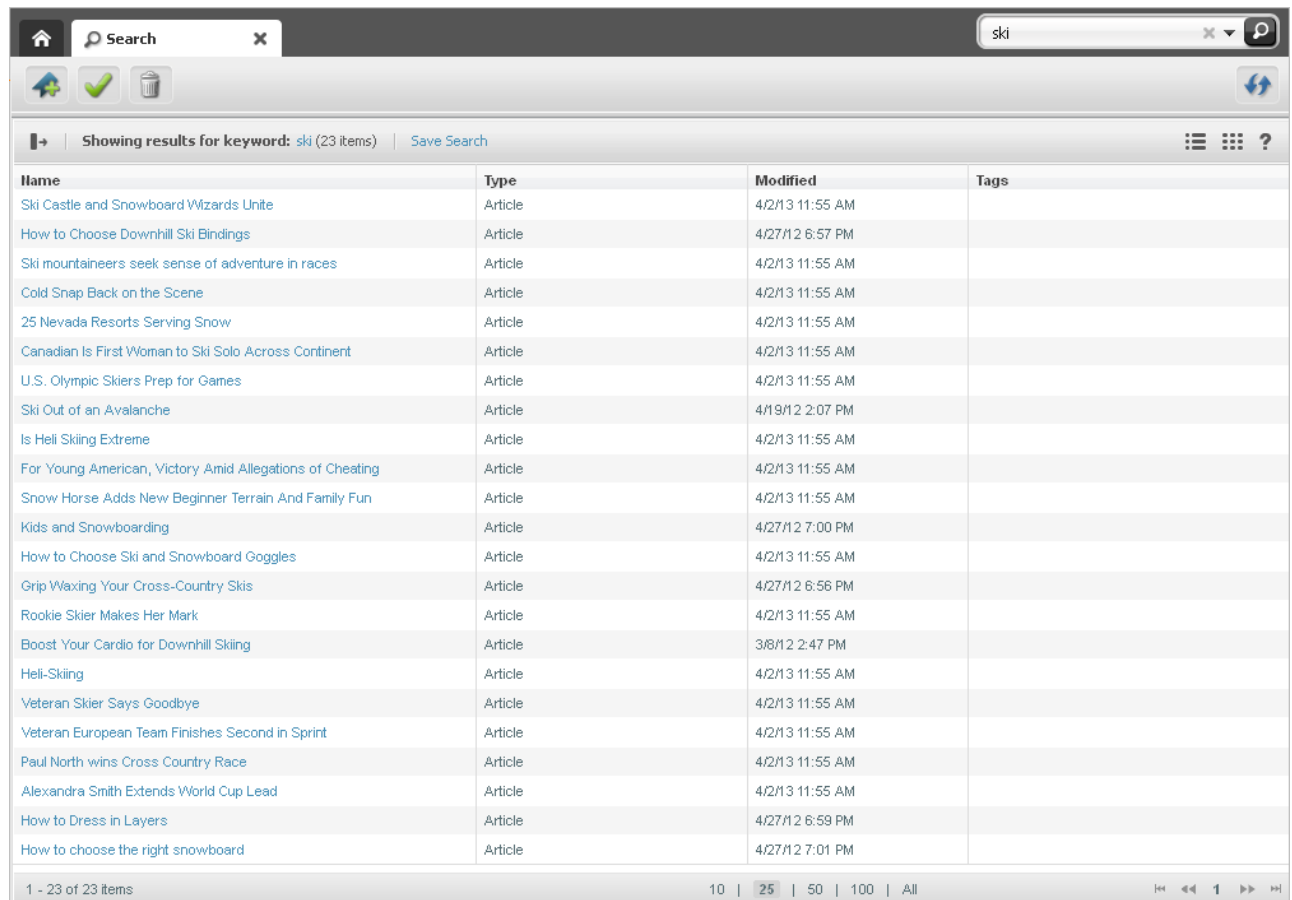
**Table 12-1 Form Sections**

This section	Allows you to...
<b>Content</b>	View and edit the content stored in the asset. For more information, see the following sections: <ul style="list-style-type: none"> <li>• <a href="#">Creating Assets</a></li> <li>• <a href="#">Editing Assets</a></li> </ul>
<b>Inherited</b>	View the attributes inherited from parent assets. Not shown if there are no inherited assets. For more information, see <a href="#">Parent-Child Associations</a> .
<b>Marketing</b>	View and edit Oracle WebCenter Sites: Engage options for the asset. For more information, see <a href="#">Working with Engage Assets</a> .
<b>Metadata</b>	View the asset's metadata, such as creation date, modification date, asset ID, and any asset-specific attributes. Modify the asset's <b>Locale</b> setting (for more information, see <a href="#">Setting or Changing an Asset's Locale Designation</a> ).
<b>URL</b>	Create, manage, and edit vanity URLs for the asset. For more information, see <a href="#">Working with Vanity URLs</a> .

## 12.5 Search and Browse Tabs

The **Search** tab opens when you conduct a search or advanced search in the Contributor interface. It displays a list of assets matching your search criteria, as shown in [Figure 12-10](#):

Figure 12-10 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, and refresh the search results list.
- **Search list options bar** –Enables you to dock the search results list to the right of your workspace, save the search criteria you used to conduct the search, and toggle the search results list between thumbnail view and list view. This bar also provides search query tips.

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

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

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**Note:**

For more information about conducting a search, see [Finding and Organizing Assets](#).

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The **Browse** tab ([Figure 12-11](#)) opens when you double-click one of the following:

- The **Bookmarks** node in the **My Work** tree – the **Browse** tab opens displaying a list of bookmarked assets. For more information, see [Finding Bookmarked Assets](#).
- A parent asset in the **Content Tree** – the **Browse** tab opens ([Figure 12-11](#)) displaying a list of children belonging to the parent. For more information, see [Assigning a Parent Asset to a Child Asset](#).

**Figure 12-11 Browse Tab**

Name	Type	Modified	Tags
Tests on Pitcher Found Banned Substances	Article	4/2/13 11:54 AM	
For Penza, an Emotional Farewell	Article	4/2/13 11:54 AM	
Frank Connors, Blues finish deal	Article	4/2/13 11:54 AM	
Dan Oswald likely to Hearing	Article	4/2/13 11:54 AM	
Hurricanes reaches deal with lefty Porter	Article	4/2/13 11:54 AM	
White Sox know chemistry will be important	Article	4/2/13 11:54 AM	
Booker humbled, thankful for Haven Award	Article	4/2/13 11:54 AM	
Special Prospect League Brings Hopes for Aspiring Ballplayers	Article	4/2/13 11:54 AM	
Peter Thorton to Start Game 2 at Winners Stadium, MLB Says	Article	4/2/13 11:54 AM	
Belker Lured in by Ravens Desire to Win World Series	Article	4/2/13 11:54 AM	
Rogers Takes 2-Day Break for Fatigue, MLB.com Says	Article	4/27/12 5:57 PM	
Rays Hire Terry Maxwell as Manager to Replace Jerry Monroe, MLB.	Article	4/2/13 11:54 AM	
Mastering the Baseball Swing	Article	4/27/12 6:12 PM	
The Changes In Baseball Equipment	Article	4/27/12 6:16 PM	
10 Important Baseball Rules for beginners	Article	4/27/12 5:58 PM	
Baseball Swing Physics	Article	4/27/12 5:59 PM	
How to Increase Pitching Velocity	Article	4/27/12 6:10 PM	
How to Pitch Left Handed	Article	4/27/12 6:11 PM	
The Baseball Beginner	Article	4/27/12 6:15 PM	
Choosing a Baseball Bat	Article	4/27/12 6:06 PM	
How to Choose a Glove	Article	4/27/12 6:10 PM	
How to Choose a Batting Helmet	Article	4/27/12 6:09 PM	

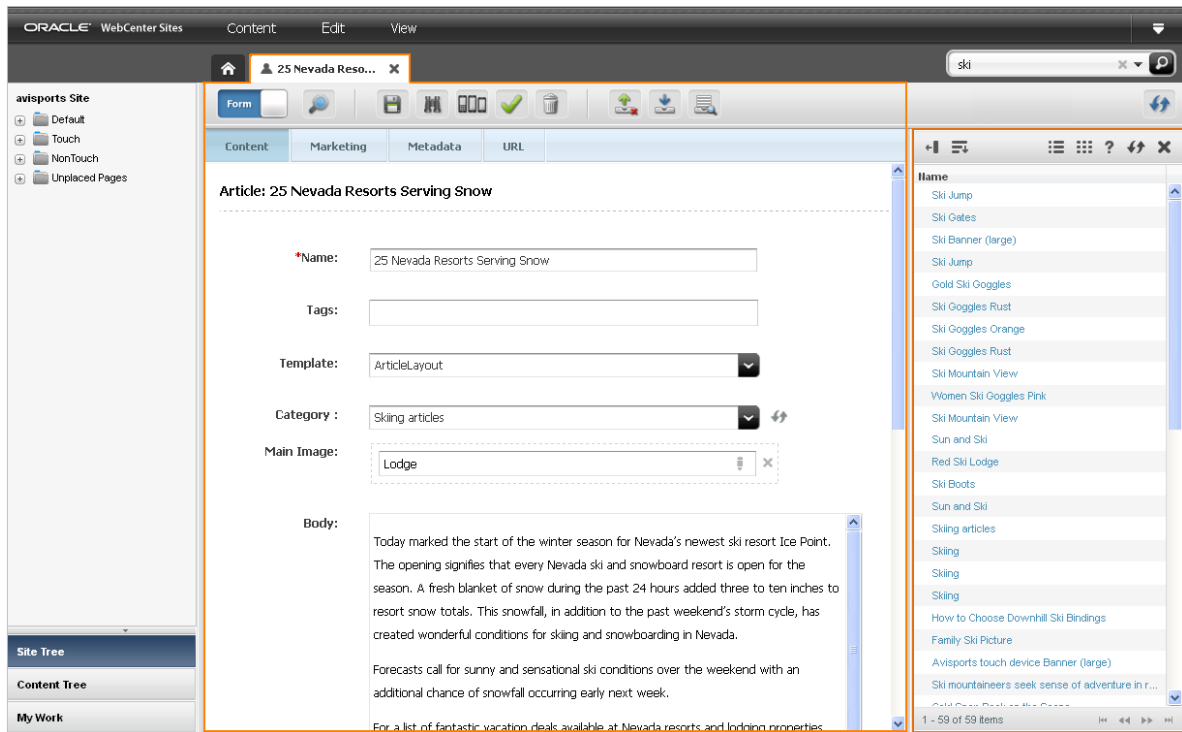
The **Browse** tab consists of the same components as the **Search** tab (with the exception of the **Save Search** option).

## 12.6 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 are docked to the right of the tab displaying the asset ([Figure 12-12](#)). This enables you to view the asset and the search results list simultaneously.

[Figure 12-12](#) is an example view of the workspace with the search results list docked to the right of a tab displaying an asset's Edit view in Form View:

Figure 12-12 Split View



**Tip:**

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

Figure 12-13 shows how the search toolbar looks when the search results list is docked to the right of an asset.

Figure 12-13 Docked Search Results Toolbar




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










## 12.7 Icons

Table 12-2 shows icons you may see in your interface, depending on your permissions.






Table 12-2 Asset Toolbar Icons

This icon	Allows you to...
	<p><b>Edit:</b></p> <p>Click to display the asset in its Edit view, where you can modify the asset.</p> <p>This icon is disabled (grayed out) if you do not have permission to edit an asset.</p>

**Table 12-2 (Cont.) Asset Toolbar Icons**

This icon	Allows you to...
	<p><b>Inspect:</b> Click to display the asset in its Inspect view.</p>
	<p><b>Preview:</b> Click to display the preview of the asset. This icon is disabled (grayed out) if you do not have permissions to preview the asset.</p>
	<p><b>Preview with Segment:</b> Click to display the preview of the asset with a segment.</p>
	<p><b>Multi Device Preview:</b> Click to open the preview of the asset in the context of one or more mobile devices. This icon is disabled (greyed out) if the Mobility component is not configured for your site.</p>
	<p><b>Save:</b> Click to save the changes you have made to an asset so far, but keep the asset's Edit form open.</p>
	<p><b>Delete:</b> Click to manually delete an asset. This icon is disabled if you do not have permissions to delete assets.</p>
	<p><b>Approve:</b> Click to approve the asset for publishing. This icon is disabled (grayed out) if you do not have permissions to approve an asset.</p>
	<p><b>Change Template:</b> Click to select another template for the asset you are working with. The template you choose determines 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.</p>
	<p><b>Check Out:</b> If revision tracking is enabled for this type of asset, click this icon to check the asset out to you. Other users cannot 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.</p>

**Table 12-2 (Cont.) Asset Toolbar Icons**

This icon	Allows you to...
	<p><b>Check In:</b></p> <p>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 can work with the asset.</p> <p>This icon is disabled (not shown) if the asset is not being revision tracked or if the asset is not checked out to you.</p>
	<p><b>Undo Checkout:</b></p> <p>If revision tracking is enabled for this type of asset, click this icon to undo the checkout.</p> <p>This icon is disabled (not shown) if the asset is not being revision tracked.</p>
	<p><b>Rollback:</b></p> <p>If revision tracking is enabled for this type of asset, click this icon to go roll back the asset to a previous version.</p> <p>This icon is disabled (not shown) if the asset is not being revision tracked.</p>
	<p><b>Show Versions:</b></p> <p>If revision tracking is enabled for this type of asset, click this icon to display the asset's revision history report.</p> <p>This icon is disabled (not shown) if the asset is not being revision tracked.</p>
	<p><b>Checkin/Checkout:</b></p> <p>Displayed in an asset's toolbar when the asset opens in Web View. 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.</p> <p>This icon is always displayed, even if revision tracking is disabled.</p>





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# Keyboard Shortcuts for the Contributor Interface

You can use keyboard shortcuts when working in the Oracle WebCenter Sites: Contributor interface.

For information about keyboard shortcuts for the Contributor interface, see these topics:

- [Keyboard Shortcuts](#)
- [Examples of Working with Keyboard Shortcuts](#)

## 13.1 Keyboard Shortcuts

The following sections list the keyboard shortcuts you can use to perform content management and other functions in the Contributor interface:

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**Note:**

Use this section as a reference only if your WebCenter Sites administrator has not reconfigured the default keyboard shortcuts.

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- [Shortcuts for Navigating in the Contributor Interface](#)
- [Shortcuts for Working with the Search Feature](#)
- [Shortcuts for Bookmarking and Unbookmarking Assets](#)
- [Shortcuts for Working with an Asset](#)
- [Shortcuts for Working with Dialogs](#)

### 13.1.1 Shortcuts for Navigating in the Contributor Interface

[Table 13-1](#) provides a list of keyboard shortcuts you can use to navigate to different areas in the Contributor interface, including the navigation pane, menu bar, and applications bar.

**Table 13-1** *Shortcuts for Navigating in the Contributor Interface*

Action	Shortcut
Navigate to the first option in the menu bar.	ALT + 1 <b>Note:</b> Navigate between menu bar options by using the right and left arrow keys.

**Table 13-1 (Cont.) Shortcuts for Navigating in the Contributor Interface**

Action	Shortcut
Navigate to the first node in the open tree ( <b>Site Tree</b> , <b>Content Tree</b> , or <b>My Work</b> tree) of the navigation pane.	<b>ALT + 2</b>
Navigate to the <b>Refresh</b> button (if available).	<b>Alt + 5</b> <b>Note:</b> Press <b>Enter</b> to refresh the content in the tab.
Toggle the applications bar open and closed.	<b>Ctrl + Alt + R</b>
(When the applications bar is open) Navigate to the first icon in the applications bar.	<b>Ctrl + Alt + W</b> <b>Note:</b> Press <b>Enter</b> to select the icon. Use the <b>Tab</b> key to move to the different icons and fields in the applications bar.
Navigate to the active tab of an asset.	<b>Ctrl + Alt + H</b> <b>Note:</b> Navigate between the tabs of the asset by using the right and left arrow keys.
Navigate to the active tab (the tab currently displaying content).	<b>ALT + 3</b>
Close the active tab.	<b>Ctrl + Shift + X</b>
Close the Contributor window.	<b>Shift + Del</b>
Log out of WebCenter Sites.	<b>Ctrl + Alt + Q</b>
Log the current keyboard command configuration to the browser's console.	<b>Ctrl + Alt + L</b> <b>Note:</b> This log shows you the current configuration for the keyboard commands you can use in the Contributor interface. To view this log, you must open your browser's Web Console tool.
Navigate between input fields (forwards).	<b>Tab</b>
Navigate between input fields (backwards).	<b>Shift + Tab</b>
Navigate between the tabs of an asset in Form View.	<b>Left and Right Arrow Keys</b>
Activate links and buttons.	<b>Enter</b>
Open the context menu.	<b>Shift + F10</b>
Select assets from a grid.	<b>Spacebar</b>
Traverse assets in a grid (list view).	<b>Up and Down Arrow Keys</b>
Navigate between columns in a grid (list view).	<b>Left and Right Arrow Keys</b>
Traverse assets in thumbnail search results.	<b>Left and Right Arrow Keys</b>
Switch between option buttons (radio buttons).	<b>Up and Down Arrow Keys</b>
Check or uncheck a checkbox.	<b>Spacebar</b>
Expand a tree node.	<b>Right Arrow Key</b>

**Table 13-1 (Cont.) Shortcuts for Navigating in the Contributor Interface**

Action	Shortcut
Collapse a tree node.	Left Arrow Key
Switch between tree nodes.	Up and Down Arrow Keys
Open a page from an item listed in a tree.	Enter
Move to the first tab on a page.	Home
Move to the last tab on a page.	End
Navigate between menu items.	Up and Down Arrow Keys
Close a menu item.	Esc
Open a submenu.	Right Arrow Key
Close a submenu.	Left Arrow Key
Traverse in a transfer box.	Up and Down Arrow Keys
Traverse in a drop-down menu.	Up and Down Arrow Keys
Rearrange multiple items in an attribute editor.	Shift + Numpad Plus/Minus

### 13.1.2 Shortcuts for Working with the Search Feature

Table 13-2 provides a list of keyboard shortcuts you can use to work with the search feature in the Contributor interface, including accessing the **Search Type** menu and the Advanced Search form.

**Table 13-2 Shortcuts for Working with the Search Feature**

Action	Shortcut
Navigate to the <b>Search Type</b> menu button in the <b>Search</b> field.	<b>Alt + 7</b> <b>Note:</b> Press <b>Enter</b> to open the <b>Search Type</b> menu.
Navigate to the search toolbar.	<b>Alt + 8</b> <b>Note:</b> Use the <b>Tab</b> key to navigate to the different icons on the toolbar.
Place the cursor in the <b>Search</b> field.	<b>Ctrl + Alt + F</b>
Highlight the name of the first asset in the search results list.	<b>Ctrl + Shift + F</b> <b>Note:</b> You can navigate through the list of search results by using the Up and Down Arrow Keys.
Open the Advanced Search form.	<b>Ctrl + Alt + J</b>

### 13.1.3 Shortcuts for Bookmarking and Unbookmarking Assets

Table 13-3 provides a list of keyboard shortcuts you can use to bookmark and unbookmark assets.

**Table 13-3 Shortcuts for Bookmarking and Unbookmarking Assets**

Action	Shortcut
Bookmark an asset.	<b>Ctrl + Alt + B</b>
Unbookmark an asset.	<b>Ctrl + Shift + B</b>

### 13.1.4 Shortcuts for Working with an Asset

[Table 13-4](#) provides a list of keyboard shortcuts you can use to perform content management functions on the asset you are currently working with.

**Table 13-4 Shortcuts for Working with Assets**

Action	Shortcut
(When working in Web View) Navigate to the Show/Hide Devices icon.	<b>Alt + 9</b> <b>Note:</b> Press <b>Enter</b> to show the Device pane.
(When working in Web View) Navigate to the A/B Test icon.	<b>Ctrl + Alt + T</b> <b>Note:</b> Press <b>Enter</b> to show the A/B Test pane.
(When working in Form View) Navigate to the first field in the asset's form.	<b>Ctrl + Alt + A</b>
(When working in Form View) Navigate to the last field in the asset's form.	<b>Ctrl + Alt + Y</b>
Navigate to the first icon in an asset's toolbar.	<b>ALT + 4</b>
Navigate to the content of the asset in the active tab.	<b>Alt + 6</b>
Save the asset.	<b>Ctrl + Alt + S</b>
Edit the asset.	<b>Ctrl + Alt + E</b>
Initiate a drag and drop command (while the search results list is docked to the right of the asset).	<b>Ctrl + M</b>
End the drag and drop command.	<b>Escape</b>
Click the <b>Go Back</b> button (when available).	<b>Ctrl + Alt + Backspace</b>
Inspect the asset.	<b>Ctrl + Alt + I</b>
Preview the asset.	<b>Ctrl + Alt + P</b>
Share the asset with another site (to which you have permissions).	<b>Ctrl + Alt + O</b>
Copy the asset.	<b>Ctrl + Alt + C</b>
Delete the asset.	<b>Ctrl + Alt + X</b>
Close message.	<b>Shift + Alt + X</b>

## 13.1.5 Shortcuts for Working with Dialogs

[Table 13-5](#) provides a list of keyboard shortcuts you can use to work with dialog boxes in the Contributor interface.

**Table 13-5** *Shortcuts for working with a dialog box*

Action	Shortcut
Navigate to the open dialog box.	<b>Ctrl + Alt + D</b>
Close a dialog when it has focus.	<b>Esc</b>
Close a dialog box when focus is not in dialog (where permitted).	<b>Ctrl + Shift + D</b>
(When working with a multi-valued slot or field) Move an asset up in the list.	<b>Ctrl + Alt + U</b>
(When working with a multi-valued slot or field) Move an asset down in the list.	<b>Ctrl + Shift + U</b>

## 13.1.6 Shortcuts for Working with the Calendar Tool

[Table 13-6](#) provides a list of keyboard shortcuts you can use to work with the calendar tool in the Contributor interface.

**Table 13-6** *Shortcuts for working with the calendar tool*

Action	Shortcut
Open the calendar tool.	Use the <b>Tab</b> key to reach the Calendar button, then press <b>Spacebar</b> or <b>Enter</b> .
Move next/previous day.	<b>Left and Right Arrow Keys</b>
Move next/previous week (same day).	<b>Up and Down Arrow Keys</b>
Move previous/next month.	<b>Page Up and Page Down Keys</b>
Move previous/next year.	<b>Ctrl + Page Up and Page Down Keys</b>
Move focus to time controls (if available).	<b>Tab</b> to hour, then minute, then seconds
Move focus to calendar from time controls.	<b>Shift + Tab</b>
Close the calendar tool and focus on the Calendar button.	<b>Esc</b>

## 13.2 Examples of Working with Keyboard Shortcuts

This section provides the following examples for working with keyboard shortcuts:

- [Example 13-1](#)
- [Example 13-2](#)
- [Example 13-3](#)

**Example 13-1 Finding and Opening an Asset**

1. Press **Ctrl + Alt + F** to place the cursor in the **Search** field.
2. In the **Search** field, enter the criteria you want to search for.
3. To narrow your search down to a specific asset type, do the following:
  - a. Press **Alt + 7** to select the **Search Type** menu, and press **Enter** to open it.
  - b. Use the Up and Down Arrow Keys to highlight the asset type you want to search for, and then press **Enter** to select the asset type and close the menu.
4. Press the **Tab** key until the magnifying glass icon is highlighted, and then press **Enter** to run the search.
5. Press **Ctrl + Shift + F** to highlight the first asset's name in the search results list, and then use the Up and Down Arrow Keys to highlight the asset you want to open.
6. Press **Enter** to open the highlighted asset in its Inspect view.

**Example 13-2 Using the Drag and Drop Keyboard Commands**

1. Find and open the asset containing the drag-and-drop field into which you want to drop an asset.
2. If the asset opens in Web View, press **Alt + 4** to focus the cursor on the first icon in the asset's toolbar, which is the **Mode** switch, and press **Enter** to switch to Form View.
3. Press **Ctrl + Alt + E** to open the asset's Edit view.
4. Run a search for the asset you want to drop into the drag-and-drop field (for instructions see [Example 13-1](#)).

The search results list opens to the right of the asset.
5. Press **Ctrl + Shift + F** to highlight the name of the first asset in the search results list.
6. Use the Up and Down Arrow Keys to navigate to the asset you want to drop into the field. When the asset's name is highlighted, press **Ctrl + M** to initiate the drag-and-drop command.
7. Press **Ctrl + Alt + A** to navigate to the first field in the asset's form, and then use the **Tab** key to navigate to the drag-and-drop field.
8. When the drag-and-drop field is highlighted, press **Ctrl + M** to drop the asset from the search results list into the field.
9. Press **Escape** to end the drag-and-drop command.
10. Press **Ctrl + Alt + S** to save your changes to the asset.

**Example 13-3 Working with the Navigation Pane**

1. Press **Alt + 2** to navigate to the first node in the open tree (**Site Tree**, **Content Tree**, or **My Work** tree) of the navigation pane.

2. Press the **Tab** button until the bar for the tree you want to open (located at the bottom of the navigation pane) is highlighted, and then press **Enter** to open it.
3. Press **Alt + 2** to highlight the first node in the tree you opened.
4. Use the Up and Down Arrow Keys to navigate to the node you want to expand in the tree, then press **right arrow** to expand it and **left arrow** to contract it.

