Departmental Migration to UCM
Japan LOB

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1 Overview

1.1 Oracle Portal to WCM migration

This document will go over the basic information needed to become fluent in using Oracle Web Content Management. This document is targetted at any department who needs to move their web site from the legacy Oracle Portal to the new Oracle UCM infrastructure.

1.2 Migration Overview

Your department will have a URL(s) that are designated as your departments new Web Content Management(WCM) site. Some of you will have the responsibility/permission to update your departmental web site. How these web pages are updated, and other related WCM concepts will be conveyed in this document.

1.3 Website Searching

There are several important web sites that you need to be aware of.

Web Site	Function
my.oracle.com	Corporate home page
content.oracle.com	Corporate Content Management System
search.oracle.com	Corporate Search Engine

When you update your content on your web site, that content will then become searchable from the Corporate home page. If we go to the URL:

`http://my.oracle.com/site/japan/index.htm`

We can see the text: "MyOracle Japan (Employee Portal for Oracle Japan)" there. Next we can navigate to:

`http://my.oracle.com`

and in the "Search OracleWeb" on the top left we can put the following in: "MyOracle Japan Employee Portal for Oracle Japan", and press search. We notice that the top hit is indeed: "http://my.oracle.com/site/japan/index.htm".

r

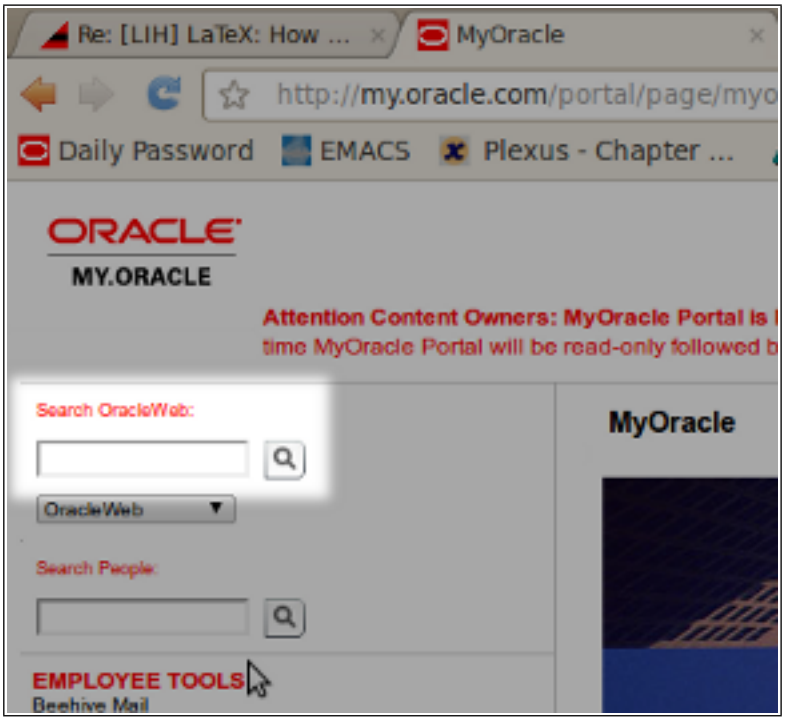

Figure 1: my.oracle.com Search box.

So that is how content you update directly on your departmental web site becomes globally accessible.

Now we will take a moment to discuss some general Content Management principles.

Figure 2: Search results.

Figure 3: Oracle Search (SES)

1.4 Content Management Overview

1.4.1 Introduction

When people hear the word 'Content Management' a common reaction is: "Oh no not another buzz word!" Then they mentally switch off, freak out or have some other reaction that doesn't end in understanding. The purpose of this document is to change that. Understanding what content management is, is very easy. It is the combination of two concepts you probably already know about. Content Management at it's essence is the combination of a file system with a database table. A file system is just the place where you have been saving your documents for years, all those files and folders on your C: drive!

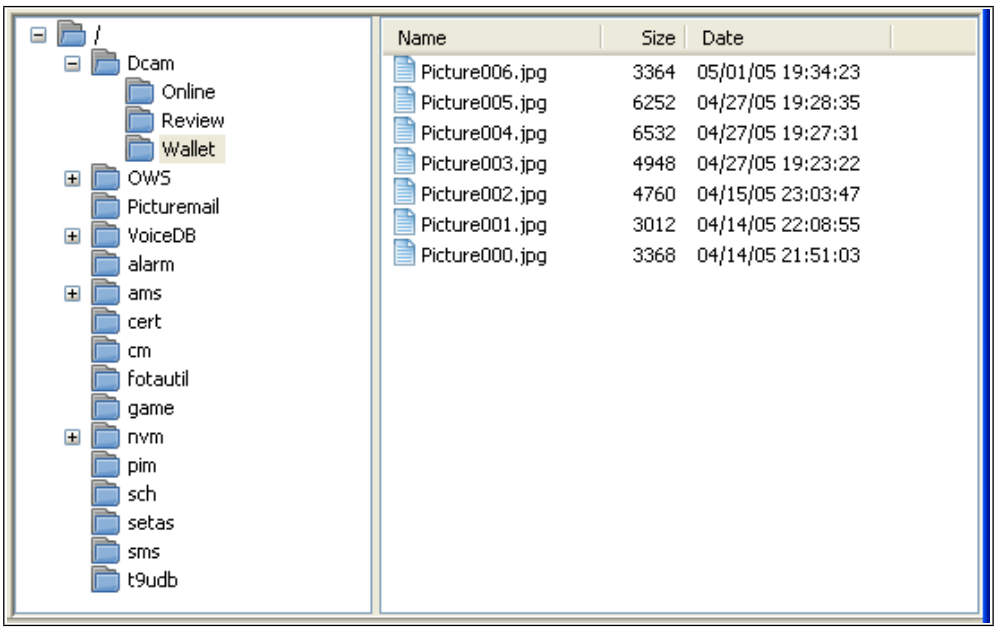

Figure 4: The concept of a file system: files and folders

The concept of a database table is really just like a spreadsheet, with rows and columns.

Don't look at these images too closely, just keep the concepts in mind. So how do these two concepts form the basis of the Content Management concept? Basically when you are talking about content management there two parts. The first part is the actual file, or piece of content. The second part is

	A	B	C	D	E	F
1						
2						
3	**Date**	**Start time**	**End time**	**Pause**	**Sum**	**Comment**
4	2007-05-07	9,25	10,25	0	1	Task 1
5	2007-05-07	10,75	12,50	0	1,75	Task 1
6	2007-05-07	18,00	19,00	0	1	Task 2
7	2007-05-08	9,25	10,25	0	1	Task 2
8	2007-05-08	14,50	15,50	0	1	Task 3
9	2007-05-08	8,75	9,25	0	0,5	Task 3
10	2007-05-14	21,75	22,25	0	0,5	Task 3
11	2007-05-14	22,50	23,00	0	0,5	Task 3
12	2007-05-15	11,75	12,75	0	1	Task 3
13						
14						
15						
16						
17						
18						

Figure 5: Information stored in rows and columns is a natural to keep information sorted.

the information about that piece of content. So what is common information people keep about a piece of content. Well some obvious information to store about a document might be:

- The author of the document
- The size of the document
- The type of document: word, pdf, spreadsheet, power-point

However, we might want to store even more information about a piece of content. We might want to say WHO can access the document. This is often a very important piece of information about the document. Think about your employement contract... you wouldn't want all your colleagues to know how much you make would you?

So up to now we are really talking about two kinds of information. The information inside the document and the information *ABOUT* the document. People often use the word *Content* to refer to the information that is *inside*

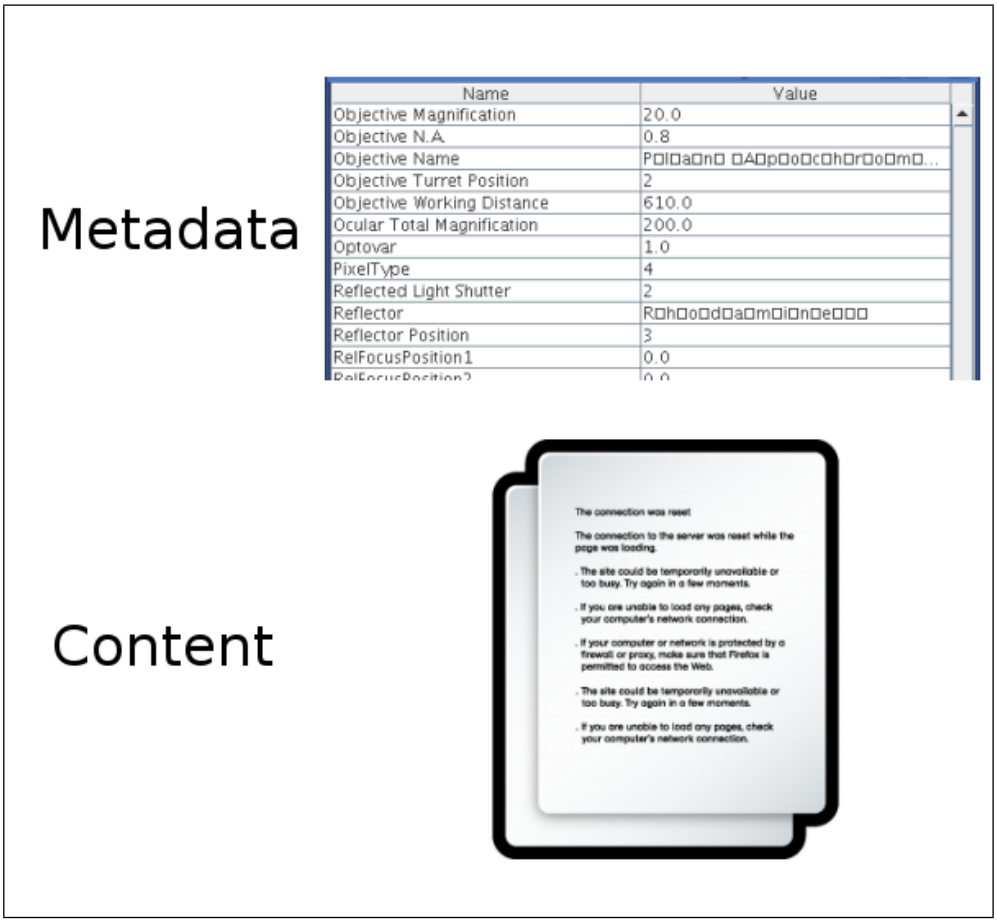

Figure 6: The concept of a file system: files and folders

the document and *Metadata* to refer to the information *about* the document. Lets look at an picture to help us conceptualize this.

So that is the essence of Content Management. You have content, a document, file, etc... and you have information about that document, metadata.

1.5 Web Content Management

1.5.1 Overview

What is Web Content Management (WCM)? The essence of WCM is that it allows non-technical people to rapidly edit content on a web site. Traditionally, a web site needs highly skilled HTML web *masters* to update the web site. However, these web master, after they have built the web site, tend to move on to building other web sites. Without these people available to keep the web site relevant, the web site information tends to become stale and out dated.

WCM seeks to address this problem. It allows web masters to build a WCM site that can be *maintained* by non-technical users on an ongoing basis. This is achieved by providing the non-technical users familiar WYSIWIG (What You See Is What You Get) editors that look much like familiar word-processing tools.

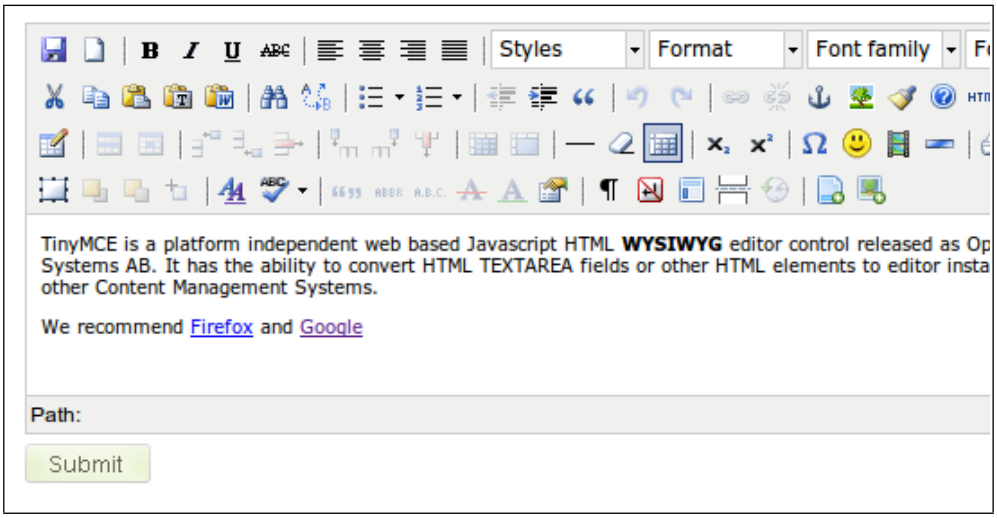

Figure 7: WYSIWYG Editor

1.5.2 How does this work in practice?

In a day to day usage scenario, a business user would decide he wanted to change some content on a web page. They would navigate to that page and press a special set of keys and the web page then displays little pencil icons

everywhere the user is allowed to modify content. They simply click the pencil icon and then they are presented with the *WYSIWIG* like the one shown above, and then they can edit the content. Once they save the section of the web page they edited, the content is either automatically updated on the production site, or alternatively it may be subjected to a workflow approval process.

1.5.3 The changed role of the Web Master

Obviously for all this 'magic' to occur, there needs to be something in-place other than plain old static HTML content. The basic architecture is that 90% of the system is contained within the Oracle Universal Content Management (UCM) system. Additionally you place a Web Server in front of UCM to send the HTML the UCM system generates to the client browser. The following diagram lays out the basic architecture of an Oracle WCM site.

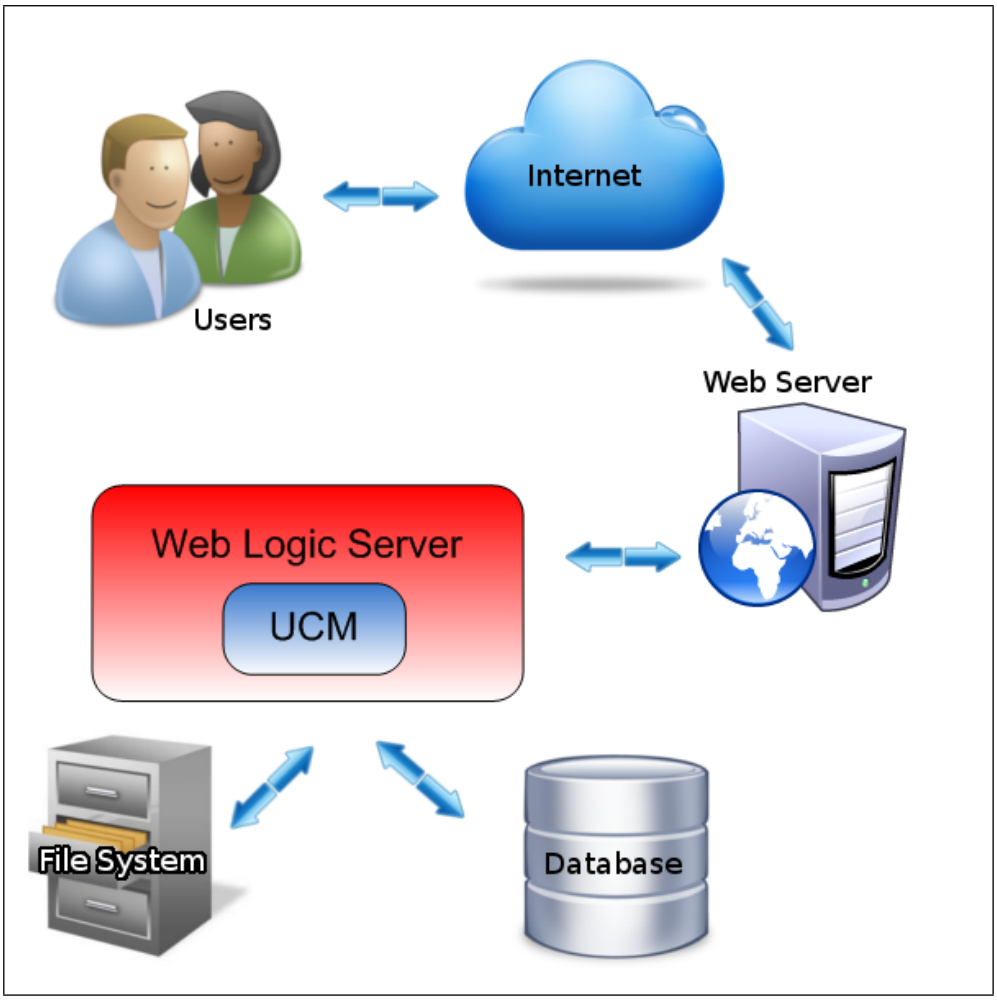

Figure 8: UCM Basic Architecture

Now the web master creates special 'Site Studio' web sites, using the tools provided by Oracle WCM, and finally we have a WebContent Management website, versus some other type of web site.

1.5.4 A new business administrator role introduced

Along with the core web master who develops the basic framework for your site, there is another sudo-administrator role introduced with web content management. This user requires technical skills somewhere between the Web Master and the end Business user. This user is given the following additional privileges:

- Create new sections for the website
- Rearrange the navigation for a website

So in summary there are three distinct roles when working with WCM sites. The number of users in that role and the technical level of difficulty are depicted in the following image:

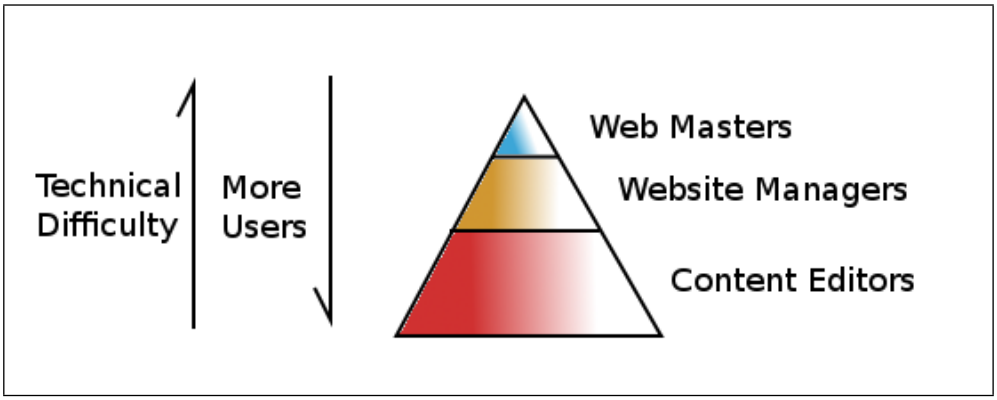

Figure 9: WCM Roles

2 Hands On

2.1 WCM Contribution

The first and most basic task will be the simple editing of a web page. Lets go to the Japan Home page and go into contribution mode.

`http://my.oracle.com/site/japan/index.htm`

`Ctrl-Shift-F5`

This puts you in 'contribution' mode. You then have different types of elements you can edit. Typically these will be broken down into your traditional WYSIWYG editor as can be seen in the figure: *WYSIWYG Editor* , or a dynamic list.

2.2 Contribution

2.2.1 Dynamic Lists

Please see the definitions sections for an explanation of Dynamic Lists.

2.2.2 Linking to Documents in WYSIWYG

When you want to link to another page/document in content server always use the 'Link To' icon in contribution mode. Do not hardcode the link by hand. The reason for this is that codes get inserted into the document that handle resolving to the correct host name, when the document gets published from contribution to consumption.

2.3 Desktop Integration

Desktop integration is an excellent tool to assist people who would like to contribute documents to the website. It modifies the behavior of Windows Explorer to allow a 'shared' drive for the Oracle Content Server. Users then use the famliar concept of a folder hierarchy to sort their content and they can update the metadata from within Windows Explorer as well.

When you have several documents/files to contribute, then you can simply drag and drop the files from your desktop into the Content Server folder, avoiding the need to check in files one-by-one.

You can get Desktop Integration by going to MyDesktop and installing the 'Oracle Desktop Integration' software application.

2.4 Site Manager

Site manager allows assigned users to *add/edit/rearrange/delete* nodes from the site hierarchy. They can specify which templates will be used for a given section. This is a higher level of privilege than your normal contributors themselves.

2.5 WCM Definitions

2.5.1 Dynamic Lists

You will hear the term 'dynamic list' quite frequently when working with a site studio site. A dynamic list is the listing generated by doing a query against the content server. For example I might do a query for all the latest report documents, like so:

```
dDocType <matches> 'report'
```

2.5.2 Page Templates

Fully-formed HTML files that define the layout and high-level look-and-feel of web pages, including the placement of contribution regions (that is, editable areas on the page), navigation aids (in the form of fragments) and site-wide images (banners and the like). Page templates are the highest-level site design object.

Page Templates are at the top of the hierarchy. They provide the framework for the pages in a Web site within which the site content is displayed. In addition to standard HTML layout and formatting code, they contain site-wide images and other assets, and tags for fragments and/or placeholders. Page templates are stored and managed on the content server.

2.5.3 Subtemplates

Subtemplates are the same as page templates, but with one important difference: subtemplates do not have ¡HTML¿, ¡HEAD¿, and ¡BODY¿ tags. As

such, they are essentially chunks of HTML code that can be inserted in page templates.

Partial HTML files (that is, without head and body sections) that can be inserted into placeholders on page templates to divide them into further smaller, reusable areas with their own placeholders and contribution regions.

A subtemplate is a partial HTML file (that is, without a head and body section) that provides a mechanism to divide a placeholder on a page template into further smaller, reusable areas with their own placeholder(s). There is a circular relationship between placeholders and subtemplate; that is, a placeholder may contain a subtemplate, which, in turn, may include one or more placeholders. Subtemplates are stored and managed on the content server.

2.5.4 Element Definitions

Files that define the editing experience for element types. Specifically, they specify what a contributor can do when editing an element.

Elements are the smallest chunks of reusable information in a Site Studio Web site. They are referenced in region templates, which causes their data to be pulled into the region template using the layout and presentation defined in the template. A region template may contain multiple element references. There are no files associated with elements as such; that is, there are no "element files" on the content server. Groups of elements are arranged in region definitions, which specify site content types. Elements are controlled by element definitions, which specify the editing experience available to contributors for an element type. Specifically, they set the available editing features in the Contributor editor when a contributor is editing elements in a contributor data file.

2.5.5 Region Definitions

Think of it as a Type of Content for example a Press Release. A press release may consist of a title, an image, and a body. So a region definition will specify three elements that are of types: text-only = title, image, and wysiwig=body.

Files that define the type of content that elements of a particular type consists of. They also specify the content creation and switching options

available to contributors for contribution regions, and set default metadata for content files associated with these regions.

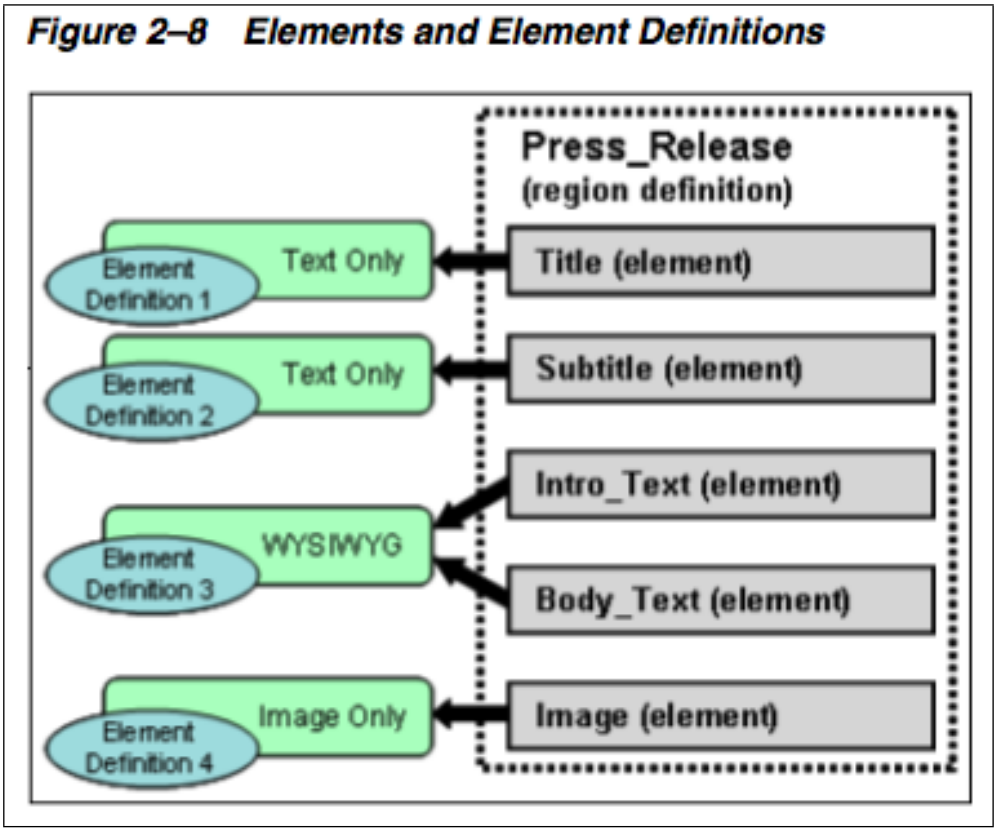

Figure 10: Elements and Element Definitions

2.5.6 Region templates

Region Templates are associated with Region Definitions. They dont need to use all the elements specified in a Region Definition. For example you could have a teaser page and then a link to the full page. 2 Region Templates, 1 Region Definition and 1Data File.

Partial HTML files (that is, without head and body sections) that define the layout and look-and-feel of the data in contribution regions within web pages.

A region template is a partial HTML file (that is, without a head and body section) that defines the layout and look-and-feel of the data in a contribution region (marked on a page template using a placeholder tag). Region templates are controlled by region definitions, which define what kind of content can go in the region template. They also specify the content creation and switching options available to contributors for the contribution region, and set default metadata for content files associated with the region. Both region templates and region definitions are stored and managed as separate assets on the content server. A region template may have one or more references to elements.

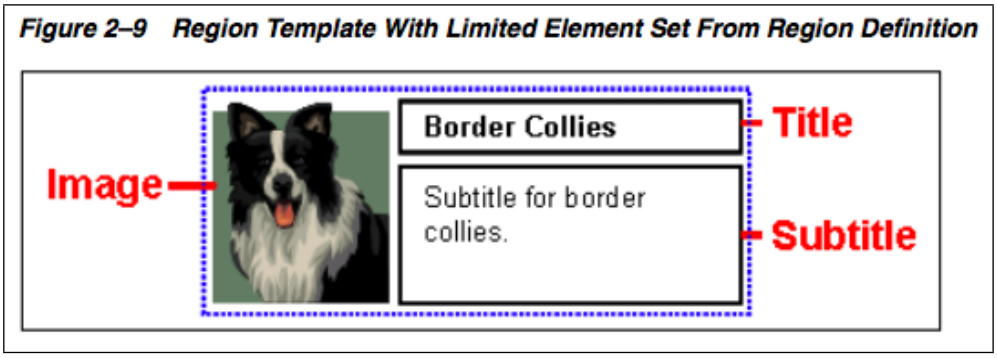

Figure 11: Region Template with limited element set from region definition

2.5.7 Contributor data files

Content files in XML format that are generated by Site Studio. Contributor data files are edited using the Site Studio Contributor application.

2.5.8 Native documents

Content files created using familiar third-party applications such as Microsoft Word. Native documents are converted to HTML format using Dynamic Converter, and they are edited using their associated application.

2.5.9 Placeholder Definitions

Files that define what region definitions, region templates, and subtemplates are allowed for the associated placeholders. They also specify what contrib-

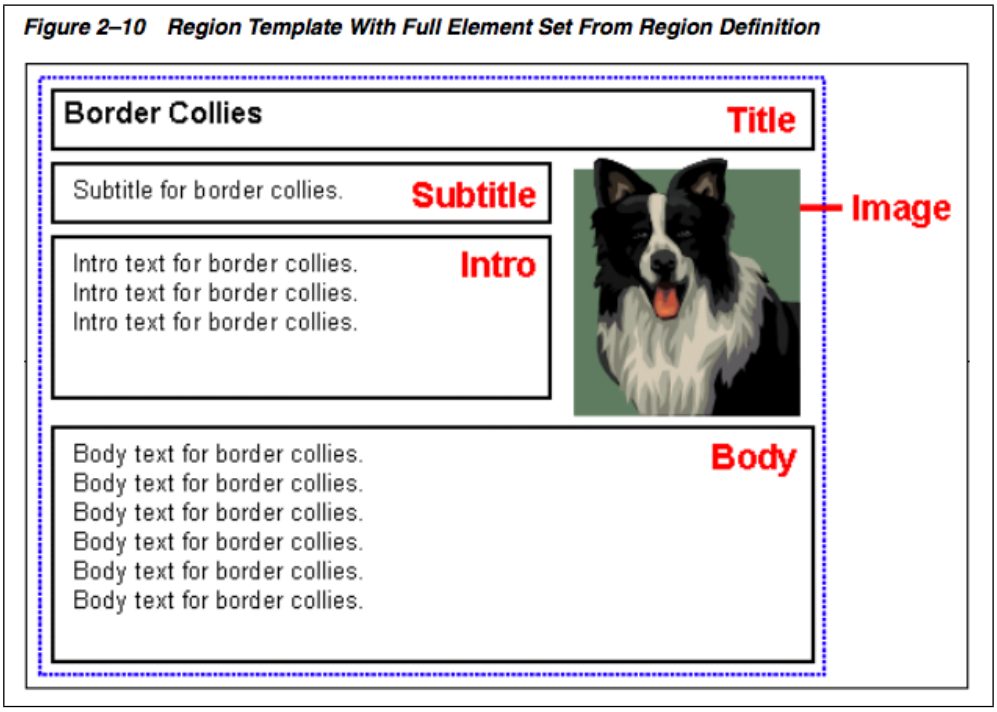

Figure 12: Region Template with limited element set from region definition

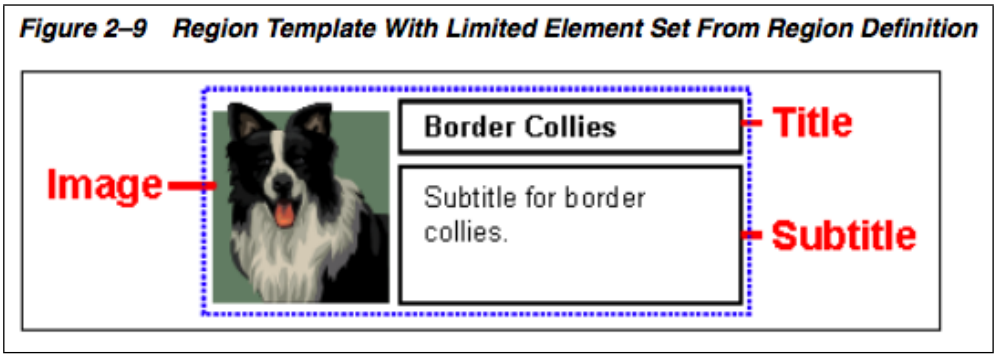

Figure 13: Region Template with limited element set from region definition

utor actions are allowed for the placeholders.

A placeholder is no more than an insertion point (a tag) on a page template to identify where there is a contribution region (that is, editable area) on the web page. What that contribution region contains and what it looks

like is defined using region templates and region definitions. A page template may contain multiple placeholders. There are no files associated with placeholders; that is, there are no "placeholder files" on the content server. Placeholders are controlled by placeholder definitions, which specify what content can go in the contribution region and how it is displayed, as well the actions available to contributors (for example, switching content or modifying metadata). A placeholder contains either one subtemplate or one region template.

2.5.10 Fragment libraries

Collections or chunks of code (fragments) that enhance the functionality of a Site Studio Web site (for example, by providing dynamic navigation aids or a standard page footer).

They are chunks of code that can be added to a page template to enhance its functionality. Site Studio comes with several predefined fragments (for example, for dynamic navigation aids), but you can also create your own fragments. A page template may contain multiple fragments. Fragments are stored in fragment libraries.

2.5.11 Manager configuration settings

Files that define the functionality that is available in Site Studio Manager. Manager is a web-based tool that allows designated users (site managers) to modify the structure of a Web site.

2.5.12 Conversion Definitions

Files that specify the conversion rules for native documents on a Web site.

2.6 Frequently asked Questions

The list below is the question and answers to date. We'll add more question and answers as they come up, and fill out the answers below as we get more information from other parties.

Q: Details on search function (on presentation pages as well as in Content server)

A: Any content you put in your website will be full text indexed and searchable globally. However, if you modify the security for any content, that

security specification will be honored in the search...that is people without permission will NOT see content they don't have security permissions to see. In addition to full-text indexing (and searching) some metadata fields will also be indexed, and some will not be. We need to get a list of which ones are indexed and which ones are not.

It seems that there was some difficulty with Japanese characters in a metadata field, and having those show up. We will raise an SR to trouble shoot this issue.

Q: How to specify a relative path in the HTML editor.

A: Although there are mechanisms to use relative paths, it is considered best practice to add links within content using Contributor's link interface (within contributor data files, use the link icon to launch) and reference links within Word using the full path but replace the server name using *httpserverrelativewebroot* token.

When you use the Contributor linking mechanism, as broken link checks can also be performed BEFORE they are deployed, using the link manager extension. For example when you link to a piece of content, then try to delete that content, you will be warned that there are links pointing to that link...so broken links are prevented before they occur.

Q: How to use style sheet.

A: Stylesheets can be used in principle, but with the site that is deployed we are currently restricted in what we can contribute to the website. We cannot include HTML or IDOC script at this point, so in some sense the discussion around stylesheets is to little avail.

Q: Any tip when using external HTML editor like Dreamweaver.

A: We recommend against using external editors like Dreamweaver. Dreamweaver creates HTML from WYSIWYG editor. This is the same functionality that Site Studio Contributor does and you cannot modify this aspect of the standard Site Studio workflow without rendering the whole system defunct. It is the assumption that you can create pretty much any layout you need with Site Studio Contributor. If there are features/techniques you cannot reproduce, the we can look at those individually.

Q: How to specify images on a navigation tab.

A: Again, this won't be possible with the level of control the site designers have delegated to the departments. If absolutely essential we can look at ways to achieve this for you, but if the requirement isn't exceptionally strong then it will be hard to justify the effort required to achieve this.

Q: How to highlight a selected tab on a navigation when the page is

selected.

A: This is controlled by the CSS using hover, active and other common link styles. However, since we are not given access to the underlying HTML/CSS we cannot make this change with the permissions to the system we have.

Q: How to specify a URL for it when we locate a HTML file in a content server, (....html? or CNT...?)

A: Use the built in link icon in Contributor. To reference links within Word use the full path but replace the server name using *httpserverrelativewebroot* token.

Q: What is the difference among Dynlistbox, Editorbox, and Editor. How to use Query Text in Editor.

A: Here is a picture of an 'EditorBox' as viewed by a visitor to the website:

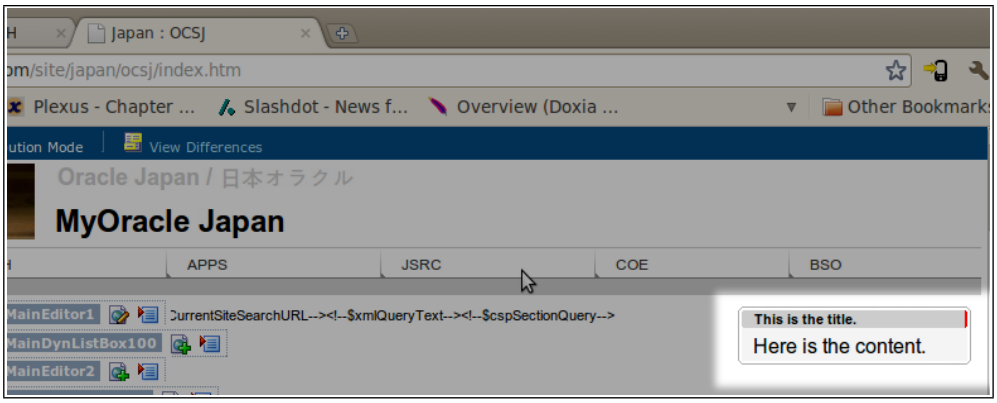

Figure 14: What an 'Editor Box' looks like.

Here is a picture of the Contributor application when editing an 'Editor' region:

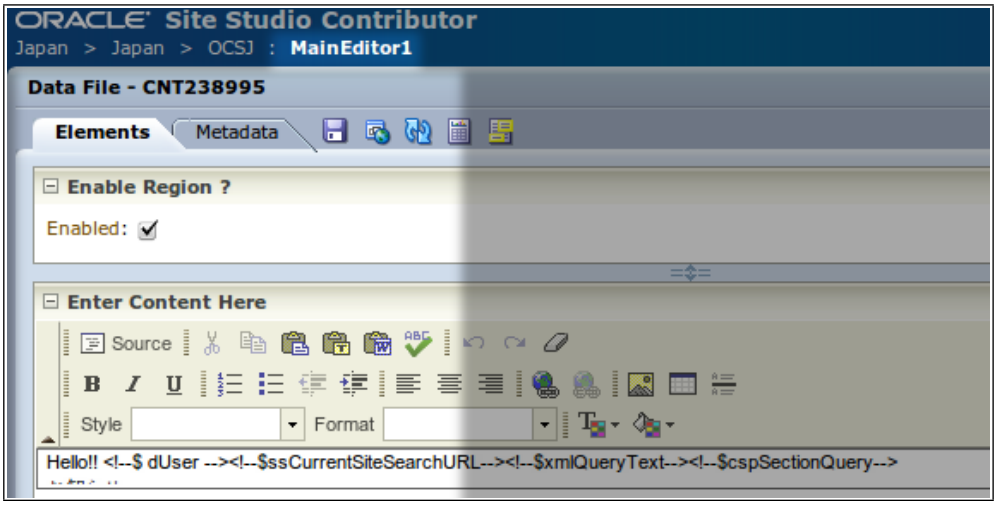

Figure 15: What an 'Editor Box' looks like.

Finally, here is an image of the Contributor application when editing an 'EditorBox' element. You'll notice an extra title field.

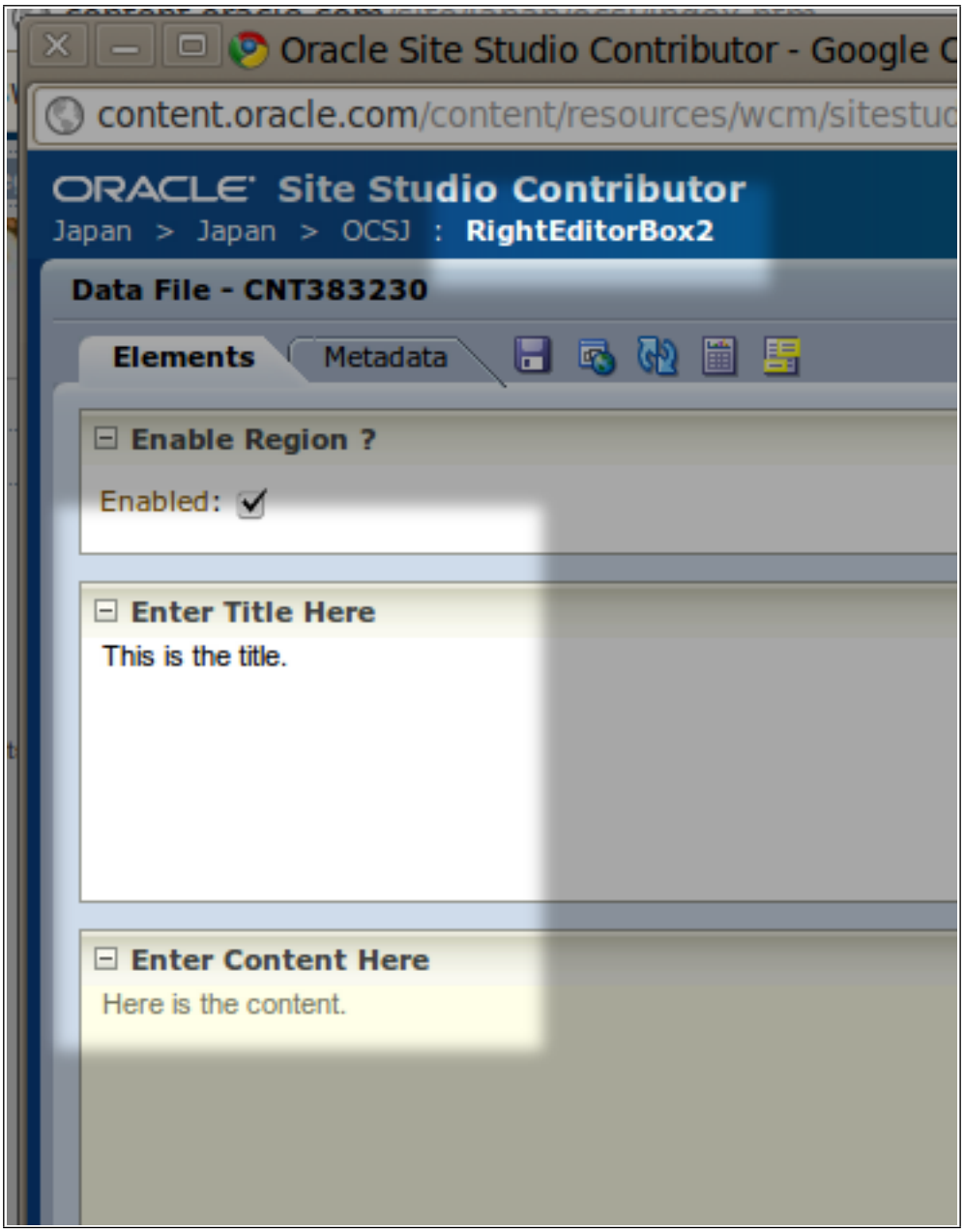

Figure 16: What an 'Editor Box' looks like.

Q: Should all the images be specified as CNTxxx files? if so, is there any effective way of editing pages because it's a little bothering to check its content ID every time when we upload an image file and change the image URL to CNTxxx on a HTML.

A: Yes all images should be checked into the content server. However, I recommend the use of Desktop Integration Suite (DIS). DIS is an extension to windows explorer that lets you drag and drop files into the content server. Then you can display the title (which comes from the filename) and the content id side by side so as to ease the migration pain...no separate upload is required then.

Q: Workflow function.

A: I will have to do a review of the workflow that has been specified for your team. That requires that I coordinate with the implementors of the site. I will CC you on all communications.

Q: How to create a private page template if possible.

A: Security is controlled by metadata. If you specify the correct metadata then the page should only be visible to those that have permission to access it. However, we need to find out what the security model of Oracle is to see if there are accounts that are put aside to allow for private data.

Q: How to use Keywords in a content.

A: You can put keywords in a metadata field that is indexed. I believe we can use the xComments metadata field for this, as that field should be indexed. Of course any word that exists in your page will become a keyword too, as the full page is full text indexed. It has been identified that there seems to be some issues with this and Japanese characters, so we'll have to deal with this by raising a Service Request.

Q: How to use the following properties on a presentation page:

- cspSectionQuery
- xmlQueryText
- ssCurrentSiteSearchURL

A: The ability to add IDOC script to contribution sections is controlled by the designers of the website. It appears that they have turned off the ability to include IDOC script on the websites they have launched to the different departments...so as a result we won't be able to specify or leverage any IDOC script.