Oracle® Cloud

Using Oracle Content and Experience Cloud

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Preface

This document describes how to use and manage content stored in Oracle Cloud.

Audience

This publication is intended for Oracle Cloud users who want to work with files using a web browser, via the desktop synchronization application, or a mobile device.

Documentation Accessibility

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

Access to Oracle Support

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

Related Resources

For more information, see these Oracle resources:

- Oracle Public Cloud:

  `http://cloud.oracle.com`
- Getting Started with Oracle Cloud
- Administering Oracle Content and Experience Cloud
- Developing for Oracle Content and Experience Cloud
- What's New for Oracle Content and Experience Cloud
- Creating Solutions with Oracle Content and Experience Cloud
- Known Issues with Oracle Content and Experience Cloud

Conventions

The following text conventions are used in this document:

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

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Getting Started with Oracle Content and Experience Cloud

Oracle Content and Experience Cloud is a cloud-based content hub where you manage your content and digital assets quickly and easily.

What is Oracle Content and Experience Cloud?

Oracle Content and Experience Cloud is a cloud-based content hub that lets you manage your content and digital assets wherever you are, keeping all your files at your fingertips at home, in the office, at the airport, or in a hotel halfway across the world. Easy-to-use collaboration and workflow management help streamline the creation and delivery of your content to improve both customer and employee engagement.

Content is at the heart of all marketing and sales efforts, and with Oracle Content and Experience Cloud you can share, collaborate, process, and manage all your content easily and effectively.

- All you need is a computer, tablet, or smartphone and you're good to go. You can manage your content just like you'd expect, adding, deleting, and moving files as needed. If a pictures needs to be approved before use on a website, you can view it on your desktop or mobile device, approve it, and move it through the design process.
- You can share entire folders with others, or just individual files. Whatever you share, you're in control of who can get to your files and what they can do with them. You can also share websites and collections of digital assets, so others have access to all the content that's needed for a project.

- It's easy to keep your content synchronized between a local computer and the cloud. Install the desktop app on all your desktop or laptop computers and it automatically keeps your files synced across all of them. No more emailing files to yourself or tedious copying to flash drives. If the files are shared and other people use the app, their shared files are automatically updated.
- You can start conversations about files, folders, or assets used in upcoming promotions, letting people post comments about it. People can also add an annotation to a file or digital asset, highlighting a specific point and making a comment about it. Or you can start an independent conversation, letting you and your team members exchange ideas about projects and processes. If you want to add a file to the conversation, just navigate to the file in Oracle Content and Experience Cloud and add it to the conversation.
- Workflows can be set up to funnel content to the appropriate people for approval and revision, eliminating bottlenecks in your process flow. Streamlined process management and content sharing mean more efficiency and less gaps in shared knowledge.
- Websites can be created and reviewed as needed with out-of-the-box templates and themes. You can easily preview what your site looks like on devices with different screen sizes. For an optimal mobile experience, page content is automatically rearranged on smaller screens. Your sites will use the most up-to-date information and assets to produce always-current material.
- You can manage all the assets you need for a website in one place and set up policies governing the use of those assets. Leverage content and data from existing sources to use it effortlessly where it's needed, right now.
- You can easily publish and update your sites and make them available immediately. You can work on one or more updates, preview an update in the site, and then, when you're ready, publish the update with a single click.
- You can create content items, such as articles or blog posts or listings, and publish the items on a website or in a brochure or wherever it's needed. Different layouts mean that the content exists separately from the format, freeing you to update your content as needed without worrying about how it will look or whether it will fit on the page.

Oracle Content and Experience Cloud: it's there where you need it and when you need it so you're always in touch with all your enterprise content.

How do I sign up?

Your organization subscribes to Oracle Content and Experience Cloud and the service administrator in your organization adds users so they have access to it. As a user, you then receive a welcome email, which contains the information you need to get started. It contains your credentials (user name, password, and identity domain) and access rights to the service. It also contains the web address (URL) for the service. If you didn't receive the email, contact your service administrator, the person who is in charge of managing your service.

How do I sign in?

To get started, enter the account information that was sent to you in a welcome email. Your system may be set up so you sign in using your corporate credentials, or you may have a separate account for the service. All of that should be in the email you received.

If you don’t know the URL or your account information or you can't sign in, contact your service administrator for details about your account or your password. The service administrator is the person in charge of managing the service for your organization.

Are my files and sites secure in the cloud?

Oracle Content and Experience Cloud uses a multi-layered approach to protect your files in the cloud:

- **User name and password**: You need a user account to access the service. Accounts are set and managed by your service administrator, the person in charge of managing the service for your organization.
- **File encryption**: Your files are protected using Secure Sockets Layer (SSL) technology. Files are encrypted while they're uploaded (in transit) and when they’re stored (at rest) in the cloud. That prevents unauthorized use of the files.
- **Access control**: You have total control over who can access your files. You can add co-workers as members of a folder, and you set the access rights for those users when they're added. In addition to sharing folders, you can also share files using links. If you send a link to a member of a folder, that person can sign in and use the file in the service. If you send the link to a non-member, that person is restricted from seeing other files in the folder.
- **Virus scanning**: When you upload files to the cloud, they can be checked by a virus scanner if that option is set by your service administrator. Any files found to be infected are quarantined in the Trash bin and a special icon marks the file as infected.
- **Passcodes on mobile devices**: When accessing your files on a mobile device, you can set a passcode to provide additional security. The passcode is a four-digit number that is set and managed by you on your device and it's used in addition to your user name and password. Any files that you download to your device are encrypted and you can't access those files outside of the Oracle Content and Experience Cloud app unless you specifically download the file for use on the device.

When managing websites, you can apply security to control who can see the published (online) site, who can see and interact with secure content on the site, and who can see and edit the unpublished (offline) site.

- When you publish a site and make it available online, it is publicly available to anyone. However, if you are the site owner or have the manager role, you can change the security settings for the site to require users to log in.
- You can also set security so that only specified groups of users can access your online site. Roles are service-wide and assigned by the service administrator. You can also add individuals as a member of a published site.

Who can do what?

What you see and what you can do in Oracle Content and Experience Cloud are determined by how resources are shared and what role you're assigned.

Organization Roles

Your role within your organization may determine how you use features:

- **Basic user**: Within your organization, you might be part of a team that shares and discusses documents such as marketing plans. Maybe you create and maintain websites and their content. You don't need to worry about managing users or modifying templates, themes, or custom components. Everything you need is ready to use. Upload documents and start conversations about them. Use the site editor to easily assemble content, collaborate with other contributors, and publish your site. Keep files and folders on your computer desktop synchronized with your files and folders in the cloud with the desktop app.

  You need the *service user* or *standard user* role. This document, *Using Oracle Content and Experience Cloud*, describes the tasks you perform.

- **Content contributor**: A content contributor handles digital assets and structured content. Digital assets are images, documents, and videos that you manage independently from your other files and folders. With structured content, the content is managed independently of the content appearance. The elements of the content—the paragraph text, the headline text, the image file—can all be used wherever they're needed, either as one cohesive group or separately in different layouts and formats.

  To work with collections, digital assets, and content items, you need the *enterprise user* role. Again, your tasks are described in this document, *Using Oracle Content and Experience Cloud*.

- **Content administrator**: As a content administrator, you define the content model by creating content types and defining relations between the content types and content layouts. A content type defines the fields content contributors will fill out when they create content items. A content layout defines what content should be displayed and how it is displayed, so you'll generally have more than one content layout associated with each content type.

  You need the *enterprise user* role as well as the *content administrator* user role. See How do I create and share content types? in this document, *Using Oracle Content and Experience Cloud*.

- **Developer**: As a developer, you create and maintain templates, themes, style sheets, custom components and other code-level resources. You can download files and work with them using your preferred tools, and even export an entire template package for a site. When you export a template, all elements of the site, including a copy of the theme and any components, are collected in a template package that you can download, work with offline, and import as a new template.

  In order to use the service, you need the *service user*, *standard user*, or *enterprise user* role. See *Developing for Oracle Content and Experience Cloud*.

- **Administrator**: Administrators have additional privileges that let them manage user accounts and settings that apply to the entire service.

You need the *service instance administrator* user role. You also need the *service user*, *standard user*, or *enterprise user* role so you can sign in to Oracle Content and Experience Cloud. See *Administering Oracle Content and Experience Cloud*.

User Roles

Your service administrator assigns you one or more user roles. The following user roles affect what you can do and see in Oracle Content and Experience Cloud.

> **Note:**
>
> To sign in, you must be assigned the service user, standard user, or enterprise user role *in addition* to any other roles you need.

- **Service user** or **standard user**: Service users and standard users can sign in to Oracle Content and Experience Cloud and see and use most of the features.
- **Enterprise user**: Enterprise users are similar to standard users, but they can also work with digital assets, content items, and collections. See Standard vs. Enterprise Users in *Administering Oracle Content and Experience Cloud*.
- **Service instance administrator**: Service instance administrators (also referred to as service administrators) have access to the Administration user interface, where they can manage user accounts and settings that apply to the entire service. You also need the *service user*, *standard user*, or *enterprise user* role so you can sign in to Oracle Content and Experience Cloud. See *Administering Oracle Content and Experience Cloud*.
- **Content administrator**: Content administrators are able to create content types. You also need the *enterprise user* role so you can sign in to Oracle Content and Experience Cloud. See How do I create and share content types?
- **Site administrator**: This role applies if your service instance administrator configured Oracle Content and Experience Cloud to allow only site administrators to create sites, templates, or components. If those restrictions are enabled, users with this role can create sites, templates, or components. You also need the *service user*, *standard user*, or *enterprise user* role so you can sign in to Oracle Content and Experience Cloud. See Configuring Sites Settings in *Administering Oracle Content and Experience Cloud*.
- **Site visitor**: This role applies if a site is set to be accessed only by site visitors. If that restriction is enabled, only users with this role will be able to access the site. See How do I change site security?

Resource Roles

What you can see and do with a resource, such as a document, content item, site, or template, depends on the role you're assigned when the resource is shared with you. For example, you might be the manager of one site, a contributor for another site, and a viewer for other sites.

When you create a resource, you're automatically assigned the Manager role. As the manager, you can share the resource with other users, assigning them roles to determine what they're able to do with that resource.

The roles below are cumulative. That is, the Downloader role has all the privileges of the Viewer role with added privileges. The Contributor role has all the privileges of both the Viewer and Downloader roles, and so on.

- **Viewer**: Viewers can view the resource but can't change anything.
- **Downloader**: Downloaders can download the resource or its associated files and save them to their own computer.
- **Contributor**: Contributors can edit the resource. Depending on the type of resource, this might mean they can rename it, edit tags or properties, and other similar tasks.
- **Manager**: Managers have full control of the resource, including adding users and assigning them roles for the resource.

How do I manage my password?

Your password controls your access not only to Oracle Content and Experience Cloud, but to all other Oracle Cloud services that you're subscribed to. You can change your password in the Cloud Identity Manager.

1. In your browser, go to `http://cloud.oracle.com`.
2. Click **Sign In**.
3. In the My Services section, specify your data center and click **Sign In to My Service**. This information is in the welcome email you received when you were assigned an account. If you're not sure what your data center or identity domain is, contact your service administrator.
4. Enter your name, your password, and your identity domain.
5. Enter your current password in the **Old Password** field and enter a new one in the **New Password** field. Re-enter your password to confirm it.
6. Click **Submit**.

To change your password, click the **Forgot Password** link on the Sign In page. Follow the prompts to enter your identity domain and user name, then answer your challenge questions. Enter then confirm your new password.

How is storage space allocated?

Your service administrator is in charge of managing Oracle Content and Experience Cloud for your organization. That person sets the amount of storage you can use. To see how much storage space you have:

- In your web browser, click your user name and then click **Preferences**.
- On your mobile device, tap the **Settings** icon to open your settings information.

You can see the maximum storage space that you've been given and the space you've used so far.

Your Trash counts against your user quota. For example, if you have 1 GB of files stored and 1 GB of files in your trash and your overall quota is 5 GB, then you have 3 GB remaining.

If you share a folder and people add files to it, those files count against your quota because it is your folder. If someone shares a folder with you, the content of that folder does not count against your quota.

If you need more storage space than you currently have, contact your service administrator.

Where do I find the downloads for the apps?

To get the desktop app to use to synchronize your files, click your user name when accessing Oracle Content and Experience Cloud in a browser. Click **Download Apps**. You can download the Windows version or the Mac version.

The mobile apps are available in the appropriate app store (Google Play or Apple iTunes). You can download the apps from the store, or you can access Oracle Content and Experience Cloud through a browser on your mobile device. When you do, you'll be prompted to download the app.

How do I get support if I have questions?

Visit our community forum to browse topics and post questions or ideas. Click the **Share Your Feedback** link in the user menu.

If you still need assistance, ask your service administrator (the person in charge of managing Oracle Content and Experience Cloud for your organization) to file a support request at `https://support.oracle.com`.

What keyboard shortcuts can I use?

The desktop app, Android mobile app, and web browser interface support the standard accessibility features and assistive technologies of the operating system that they run on, such as keyboard shortcuts, voice assistance, and so on. Consult your operating system help for details.

When using a Safari browser, you might need to configure tabbing behavior which might not be set by default. Access your Safari preferences and select **Press Tab to highlight each item on web page**.

When using Firefox with the macOS/OS X operating system, you might need to set tabbing behavior as well. Open your operating system preferences and choose **Keyboard Preferences**. Select the **Shortcuts** tab. In the **Full Keyboard Access** section, set the option to **All Controls**.

Note:

- To see all keyboard shortcuts in the web client, press the question mark (?) when viewing the People or Conversation pages. A list of available shortcuts is shown.
- When you play audio or video in accessibility mode, you can't navigate to the action bar to perform actions such as viewing file properties. You can only access the controls to play or pause the audio or video. To perform other actions on the file, go back to the file listing (using Backspace or Esc), where you can use the keyboard to access file actions.

Global Keyboard Shortcuts

Task	Keyboard Shortcut
Search for content.	/
Go to first item in list.	Home
Go to last loaded item in list.	End
Load more items in list.	.
Close active menu or dialog.	Esc
Expand/collapse navigation panel.	gn
Go to Flags page.	gf
Go to Conversations page.	gc
Go to People page.	gp
Go to Documents page.	gd
Go to Sites page.	gs
Go to Themes page.	gt
Go to Components page.	ga
Go back one page.	Backspace

Calendar Keyboard Shortcuts

Task	Keyboard Shortcut
Move to previous/next month.	Page Up/Page Down
Move to the current month.	Ctrl+Command +Home
Close the calendar, and erase selections.	Ctrl+Command +End

Content Type Editor Keyboard Shortcuts

Task	Keyboard Shortcut
Move focus to previous/next data field.	Up Arrow/Down Arrow
Select a data field to add to content type definition.	Enter
When data field is selected, place it as first item/last item in content type definition.	Alt+Up Arrow/ Down Arrow
When focus is on item in content type definition, move data field up/down in definition list.	Alt+Up Arrow/ Down Arrow

Conversation List Keyboard Shortcuts

Task	Keyboard Shortcut
Open selected conversation.	Enter
Move focus into conversation entry.	Shift+Enter
Create a new conversation.	n
Mark all messages in selected conversation as read.	m
Mark or clear selected conversation as favorite.	v

Message List Keyboard Shortcuts

Task	Keyboard Shortcut
Post a message.	t
Reply to selected message.	r
Edit selected message.	e
Like selected message.	l
Clear flag for you on selected message.	c
Manage flags for selected message.	f
Mark selected message as read.	m
Next message.	j
Find next item (based on selected find criteria).	x
Find previous item (based on selected find criteria).	p

Posting or Replying Keyboard Shortcuts

Task	Keyboard Shortcut
Applies bold style.	Ctrl+b
Applies italic style.	Ctrl+i
Applies underline style.	Ctrl+u
Remove formatting from selected text.	Ctrl+f
Upload document.	Ctrl+d
Send post or reply.	Ctrl+Enter

Task	Keyboard Shortcut
Clear your message text.	Esc

What languages, devices and software are supported?

By default, the web interface language type matches the web browser locale, but you can override that in your user preferences. Click the menu next to your user name and select **Preferences** then choose your language option. If you change your language setting, that won’t take effect until the next time you sign in.

The user interface language for the desktop and mobile apps is set automatically based on the user locale set for the operating system. You can’t override this language setting in the apps.

See Supported Software, Devices, Languages, and File Formats in *Administering Content and Experience Cloud* for a complete list.

Is Oracle Content and Experience Cloud Service accessible?

The desktop app, Android mobile app, and web browser interface support the standard accessibility features and assistive technologies of the operating system that they run on, such as keyboard shortcuts, voice assistance, and so on. Consult your operating system help for details.

Keyboard shortcuts are described in detail in What keyboard shortcuts can I use?

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.

What do the icons mean?

Several different icons are used in the web browser and in the desktop app.

Here’s a quick look at the icons you might see on your home page in your web browser, in the desktop app, or on a mobile device:

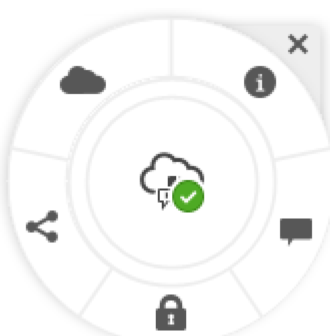
Icon	Meaning
	Click this to minimize or maximize the left navigation panel.
	A folder that hasn’t been shared with anyone.
	A folder that was shared with you or that you shared with others.
	Click or tap to download the item and store it for use on your local computer.
	Click or tap to open the sharing dialog, where you can create a link for a file or folder, or you can add members to a folder.

Icon	Meaning
	Click or tap to mark something as a favorite.
	Shows that a conversation has been started about a file or folder. A conversation is a place where you can share comments with people about a particular item. Click or tap the icon to open the conversation.
	Shows that an item has been reserved by someone and can’t be used.
	Click this to see menu options that might not fit on the menu bar.
	Click this to start a conversation or view a conversation that’s already started.
	Click this to change how you view the items on the page, either in a list, a detailed view, or a grid.

Here’s a look at additional icons you might see when using the desktop app:

Icon	Meaning
	The desktop app icon, which appears in your system tray (Windows) or menu bar extras area (Mac).
	The icon that is superimposed on your files and folders, showing that they’ve been synchronized successfully.
	The icon superimposed on files and folders, showing that synchronization is in progress.
	Indicates there may be a synchronization problem with a file.
	Indicates that additional information is available for a file.

When using Microsoft Office 2010 or later versions, a quick-access radial menu is installed automatically when you install the desktop app. This menu appears whenever you have the app active and you work with a Microsoft Office file that’s being synced. Click on any location on the menu to quickly access Oracle Content features directly from the file. You can view the properties of a file, work with reservations or share the file, view conversations associated with the file, or open the file in Oracle Content in your web browser.



2 Managing Your Files and Folders

What's New in This Release

The Basics

- Quick overview of your browser home page
- What kind of content can I manage?
- What can I do with my files and folders?
- How do I use digital assets, content items, and collections?
- How do I customize my profile and settings?

Files and Folders

- How do I upload files?
- How do I download files?
- How do I view a file or media?
- How do I view details about a file or folder?
- How do I search files, people, and conversations?
- How do I reserve a file?
- How do I edit files in my browser?
- How do I recover an older file version?
- How do I change the ownership of my folders?
- How do I use custom properties?

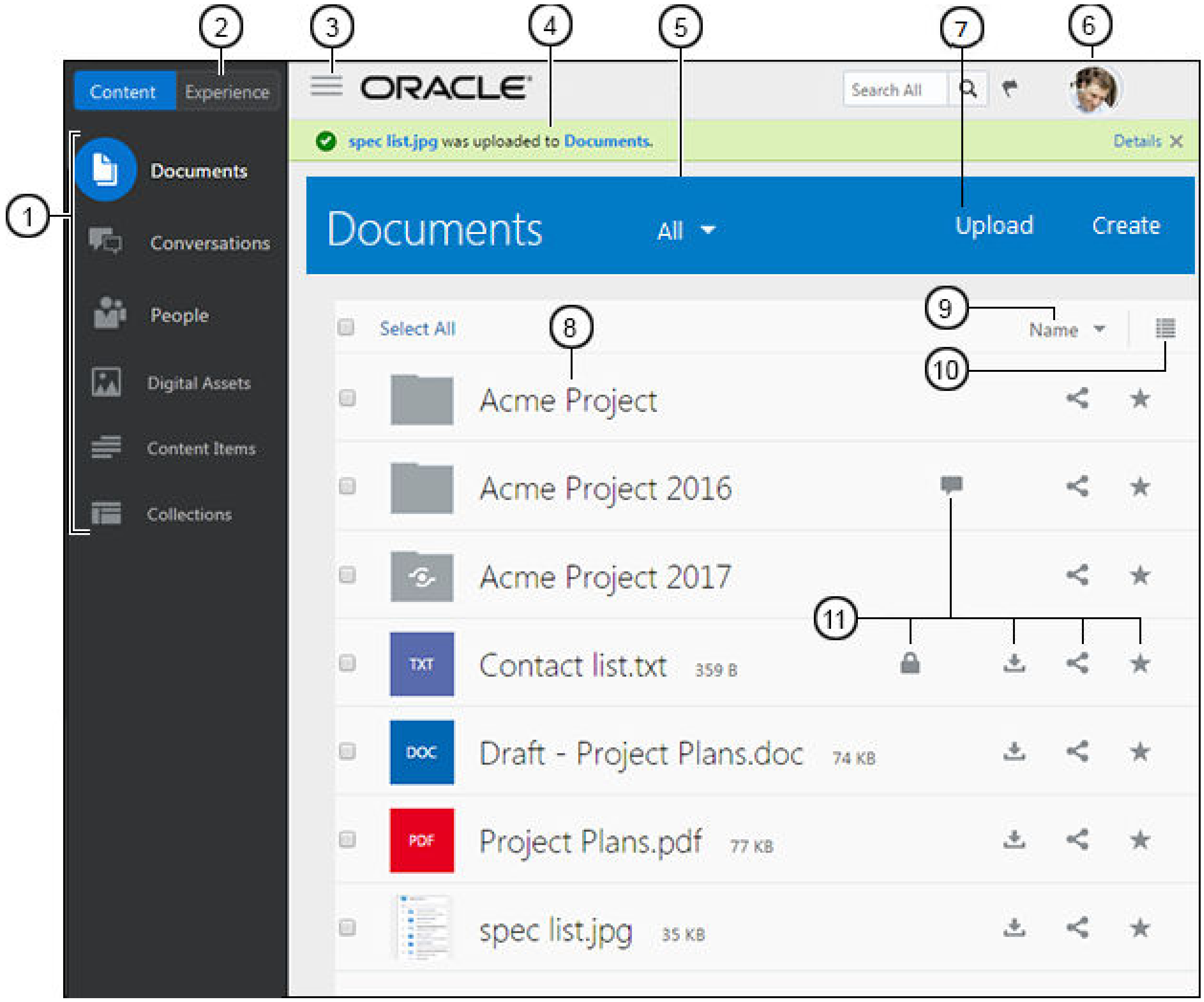
Collaborating with Others

- How do I share files and folders?
- How can I use conversations to collaborate with others?
- How do I use workflows?

Quick overview of your browser home page

Oracle Content and Experience Cloud gives you collaboration and content sharing with just a few clicks of your mouse. Take a minute to learn how and where to find what you need.

Here’s what you see on your home page when you get started:



Item	Description
1	The **navigation panel** is where you can switch between your conversations, your documents, and your people list and access other choices, such as digital asset management. The options you see on this panel depend on the user role you've been given. For example, only enterprise users will see options for Content Items and Digital Assets.
2	Click the **Experience** and **Content** tabs to switch between the various content and experience management features.
3	Click the **Show/Hide** icon to open or close the navigation panel
4	Messages are shown in the **message bar** at the top of your content listing.
5	**Filter** what you see to view only your favorites, just your content, items that are shared with you, or to view what's in your trash folder.
6	The **user area** is where you can change your preferences or find the desktop and mobile apps. Click your user picture to change your defaults. If you have notifications from conversations, the flag will show the number of notifications.
7	**Upload new files** or **create new folders** by clicking the appropriate option.

Item	Description
8	Your **content list** shows the types of files as well as if folders are shared or are your own unshared folders .
9	**Sort** your content list by name or by date.
10	Click the **view icon** to display items in a list view, a compact view, or a grid view.
11	Click an **icon** to download it ( ), share it ( ), or mark something as a favorite ( ). The conversation icon ( ) shows that there's a conversation started for that item, and the reserved icon ( ) shows that a file is reserved and locked.

Folders

When you open a folder, you'll see slightly different actions you can perform.

- Click **Share Link** to create a link for the folder.
- Click **Members** to add members to the folder. Note that you can't share your Digital Assets folder.
- Click **Upload** to add new content to the folder.
- Click **Create** to create a subfolder.
- Click to see additional options for the file or folder.
- Click to start a conversation about the folder or item you're viewing. You can also view any conversation that's already in progress.

Conversations

The Conversation page uses most of the same action options you know from your home page. Only the menu choices are different.

- Click the filter button next to the heading to view all conversations, ones you've marked as favorites, closed conversations only, or those that are muted.
- Click **Create** to start a new conversation.

You can sort the conversations by name, or last updated or you can view only those conversations with unread messages. You can also use an expanded or compact view, just like when viewing your documents.

The conversation icons tell you what kind of conversation it is. A conversation about a folder or a file shows a folder or file icon near the conversation. If the conversation was created independently of a file or folder, there is no icon.

What kind of content can I manage?

You can organize and work with any kind of file that's allowed by your service administrator (the person in charge of managing Oracle Content and Experience Cloud). You can upload and download documents, video files, pictures and graphics—all the files you might need for your projects.

You can also upload templates and other files needed for your websites. This includes the digital assets, such as pictures or videos, that you might need on your website. Those are managed using the digital asset manager. You can also create content items, which are blocks of content based on a content type created by your administrator. For details about managing those kinds of files, see Working with Digital Assets and Working with Content Items and Collections.

No matter what kind of content you need for your work, it's right where you need it, whether you're sitting at your computer or on the go, using a mobile device.

What can I do with my files and folders?

You can organize and work with your files in the cloud from a web browser in much the same way as the files on your local computer. All you have to do is sign in to Oracle Content and Experience Cloud and you're ready to go.

If your assigned user role doesn't let you do a particular task, or if you can't perform a task for some other reason, the menu option won't be available.

The folder icons on your home page show what kinds of folders they are. A folder with a shared icon ( ) indicates that you shared the folder or someone else has shared a folder with you. A plain folder ( ) indicates one of your personal folders. File icons show the type of file, for example, a .jpg file or a .doc file.

To filter what you see, click the menu next to the heading on the home page. You can view all items, shared items, favorites, or items in your Trash folder.

To sort your file list, click the sort option at the top right corner of the file list. You can sort by name or by when the items were last updated. Click to select a list view, a compact view, or a grid view of your files and folders.

The following table lists common actions you can do in the service. Depending on how wide your browser window is, you may not see all menu options. If you don't see an option when you select an item, click **More** in the menu bar to see the hidden options.

Task	Description
Create new folders	Browse to where you want to create a new folder or subfolder and click **Create**.
Copy or move files or folders	Select one or more files or folders and choose **Copy** or **Move** on the menu bar or right-click menu. If you copy a file or folder to the same location, the copy is renamed with a number added to the name. For example, *Sales Report(2).doc*.

Task	Description
Rename files or folders	Select the file or folder to rename and choose **Rename** on the menu bar or right-click menu. You can’t change a file extension.
Delete files or folders	Select one or more files or folders and choose **Delete** on the menu bar or right-click menu. If you delete a file or folder, it's moved to your cloud Trash folder, just like on your local computer. If you change your mind, go to the Trash folder and restore the deleted item. To check your Trash, click the **Trash** link on the pulldown menu on your home page. Deleted items stay in the Trash until one of the following events happens: • You permanently delete them. • Your Trash quota is reached. • The Trash is automatically cleared out according to the schedule set by your service administrator, the person in charge of managing the service for your organization.

How do I use digital assets, content items, and collections?

Digital assets are images, documents, and videos that you manage with a special interface. Digital asset management is only available to enterprise users.

“Digital asset management” is a way to group and manage all the assets that are used for one purpose, like in a website or for a particular project. You can add the files (“assets”) to the Digital Assets folder on your home page, or upload files directly to the asset view, shown when you click **Digital Assets** in the navigation panel. You can tag assets, too, by adding a keyword when you add the asset. This makes it easy to find and sort them later.

Content items are created using a content type as a structure to dictate what fields are included in the content item. For example, a content type for an employee entry on a website may have fields for Name, Job Title, Contact Information, a photograph, and a brief biography. The content item would include the employee’s name, their job title, and so on. Like digital assets, a content item is managed in a collection and used in websites or for other uses.

A *collection* is a way to manage all the items needed for one project in one manner. Policies can be defined for a collection which dictate how the items in the collection can be used. For example, a collection may have a policy that content can only be used if it is approved by a manager. That policy applies to everything in the collection —digital assets or content items.

See Working with Digital Assets for details about digital assets. See Working with Content Items and Collections for details about using content types and items.

How do I customize my profile and settings?

To change how defaults are set for your account, click your user picture and then click **Settings**. Select your preferences from the list.

- **General**: You can change your date format and language.

- **Notifications**: You can change how you'll be notified if you're flagged in a conversation. You can also receive a daily digest of activities.
- **Conversations**: You can change the way messages are managed and change your membership options in conversations.
- **Documents**: You can view your space quota and the notifications you'd like to set when document-specific behavior occurs. You can also specify if you'll allow public links to your files and folders, and what the default role for new public links should be. You can also set the maximum role you'll allow for any public links that are created. Overall sharing rules are set for the entire system by your service administrator, so some of these options may not be available.
- **Linked devices**: This shows any mobile devices or desktop apps that are linked to your account. If you change devices or lose one, you can click **Revoke** and your sign-in session is ended. All local content stored on the device for that account is deleted.

  Revoking access for the device affects only one account, so if you're using multiple accounts, you need to revoke access separately for each account to block all access to Oracle Content and Experience Cloud and delete all local content stored on the device.
- **Applications**: If custom applications were added to your service, information about those applications appears here.

To change your profile information, click your user avatar and then click **View Profile** and then **Edit Profile**. You can alter your contact information, enter a description, or define your areas of expertise. Click **Update** to save your changes. The profile information appears on your user "wall". When someone follows you, they can view this profile information.

How do I upload files?

There are several ways to copy your files from your computer to the cloud. File uploading continues in the background, so you can continue to work while files are being added.

- Drag and drop the files from your local computer to your web browser.
- Click **Upload** to add files to the current location.
- Select an unopened folder and choose **Upload to this Folder** from the right-click menu or the menu bar.
- You can also select a file and choose **Upload New Version** from the right-click menu, the menu bar, or the version history dialog.

Keep these things in mind when you're uploading files:

- You can tag files as you upload them by giving them identifying keywords. If you decide later that you want to use that item as a digital asset, you can easily search for the tag and add it to your digital assets collection or folder.
- Try to keep file uploads smaller than 5 GB. Some web browsers can't process files bigger than that.
- To add the contents of an entire folder, you can set up the desktop app. Just add the folder into the sync folder and the content is added to Oracle Content and Experience Cloud for you.

- If someone shared a folder with you, you may not be able to upload a file into that folder or download a file. It depends on the role you were given when the folder was shared. For example, if you have a Viewer role, you can't upload files and the option to upload a file is unavailable.
- Your service administrator may limit the kinds of files you can upload. To see what file types aren't allowed, open your user menu and then click **Settings**. The Documents section lists any limitations on file types and file sizes (if there are any). Files types are listed according to the file extensions, such as `.mp3` or `.exe`.
- To cancel an upload, click the **Details** link on the information bar at the top of the screen while the file uploads. Click the **X** for the file you want to cancel.

How do I download files?

You can download files from the cloud to your local computer in a couple of ways:

- When viewing a file, click **Download** in the file viewer.
- When viewing files in a list, select a file and choose **Download** from the right-click menu or the menu bar. You can also click on the right side of the row.

How do I view a file or media?

To view a file, like a document or an image, click the file name or thumbnail and the viewer opens.

- Click the plus (+) or minus (-) icons or move the slider bar to make the view bigger or smaller.
- Click the right and left arrows at the top of the preview window to view other files in the folder.
- If the file isn't viewable (for example, if it's a .zip file or a video file), you're prompted to download the file for use. You'll need to have a Downloader role to do that.
- Click **Download** to get a copy of the file. If the file is in a shared folder, you may not be able to upload a new version or download the file, depending on your role. If you can't do it, the option doesn't appear.
- You can use the full screen to view a file. Click **Full Screen** (click if you don’t see that option). Use the arrows in the full screen view to move to other files in the folder. Use the controls at the top of the screen to zoom in or out of the view.

How do I view details about a file or folder?

Select the item and choose **Properties** from the right-click menu or menu bar to see details. If the item is a file, you’ll see information about the access history and version history for the file. If the item is a folder, you’ll see details about who created the folder, as well as sharing information.

How do I search files, people, and conversations?

Enter a search term, such as a file name, conversation name, digital asset tag, or hashtag, at the top of the screen and press **Enter** or click the Search icon. If you want to search only in a specific folder, open the folder and enter your search term. You can enter just a few characters of your search term and a list of possible matches is shown, separated by type (documents, conversations, and so on). This lets you quickly find what you need even if you don't know the entire search term.

If you don't have permission to view an item, you won't see it in your search results even if it met your search criteria. After your search results are listed, you can use the results like you would normally. You can add files to folders, add posts to conversations, upload files, or share folders with others.

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- You can search for multiple terms by separating the terms with a comma or a space.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.
- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
  - `not` or the dash (-). For example, `Report2013,Report2014 -sales` returns `Report2013` or `Report2014`, but not items with the keyword `sales` in them.
  - `or` or a comma. For example, `Report2013 or Report2014` returns the same results as `Report2013,Report2014`.
  - `and` or a space. For example, `Report2013 and Report2014` returns the same results as `Report2013 Report2014`.

  The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2013 and Report2014 not Report2014` returns nothing because `not` is evaluated first.
- To look for a phrase, use double quotes around the phrase. For example, `"United States"` returns files with the exact phrase `United States` in the file.
- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.

- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.
- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

How do I reserve a file?

Reserving a file shows other people that you are working with the file. Select the file you want to reserve and choose **Reserve** from the menu bar or right-click menu.

When viewing a file, you can click and select **Reserve**. The reserved icon ( ) is added to the file's information line.

Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.

If someone tries to upload a new version of a file you reserved, they'll be informed you reserved it. They can clear the reservation and upload the new version if necessary. If you set your preferences to be notified, you'll get an email when that happens.

How do I edit files in my browser?

You can edit files stored in Oracle Content and Experience Cloud and if you have the desktop app installed, any changes you make to the file will then be synced to any device synced with your account.

To edit a file, select the file from your file list and click **Edit** on the menu bar. You can also view the file then click the **Edit** button. You're prompted to open the file using the desktop app. The file opens with the software installed on your computer to make your edits (for example, Microsoft Word when editing a .doc file).

When you finish editing, save the file as you would do normally. If you're already syncing the file, the latest version is shown in your folder and on your other devices as well. If you didn't sync the file beforehand, the newly synced file is stored in your .download folder in your Oracle Content folder on your desktop.

How do I recover an older file version?

There may be times when you want to work with an older copy of a file, or revert back to a previous version. Select the item in your file list, right-click, and click **Version History** in the menu bar or the right-click menu. When viewing a file, you can click the version number next to the file name to see the version history.

To make a previous version the current version, click the **Make Current** link for the version you want to use as the current version.

You can also delete previous versions or download older versions by clicking the **Delete** or **Download** links.

How do I change the ownership of my folders?

You can transfer ownership of a folder to another person. When you do, the folder and its content will be added to the quota of the person assuming new ownership.

To change owners, select the folder and choose **Properties** from the menu bar or the right-click menu. Click **Change Owner** and select the name of the new owner from the list. Add an optional message to be sent to the new owner or use the default message as given. Click **Done** when finished.

How do I use custom properties?

Custom properties are used to quickly categorize your files and folders with additional descriptions, known as *metadata*.

Your service administrator may have created custom properties that are specific to your organization. For example, perhaps you need to track when an item is approved by other people and who approved it. A custom property called “Document Approval” could be created which lists fields such as file type, the originator of the file, who approved it and when it was approved.

You could then move all files that have been approved into one folder and apply the custom property to the folder. All the files in the folder will be identified as approved. You can edit the custom properties for the different files to show their approval date, who approved it and any other pertinent details.

People with the Owner, Manager, or Contributor role can apply custom properties to files and folders. People with the Viewer or Downloader role can view any properties that are set.

Custom properties are automatically created for items that are stored as digital assets. Only service administrators can create other custom properties. Work with your administrator to develop the properties you need.

To start using custom properties:

1. Open the file or folder you want to use and click .
2. Click again and then click **Custom Properties**.
3. Click **Manage**.
4. Select the name of the custom property you want to use.
5. The fields that were created for the custom property are displayed in the side panel. Enter the information as needed. Remember, if this is a custom property for a folder, any information entered will be used for all the files in the folder.
6. Click **Save** when done.

To view a digital asset’s custom properties:

1. Find and view the digital asset, either in your Digital Assets folder or in the asset view (click **Digital Assets** or).

2. Click again and then click **Custom Properties**. The Custom Properties pane opens, showing the tags associated with the item and the collections where the item is managed.

How do I share files and folders?

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Sharing Your Content and Sites with Others for more details.

How can I use conversations to collaborate with others?

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Using Conversations to Collaborate.

How do I use workflows?

If Oracle Process Cloud Service is integrated with your service, you can use it to initiate and track workflows and tasks.

To use the folders in Oracle Content and Experience Cloud with a process, you must designate the folder as one that’s used with Oracle Process Cloud Service. You must also share the folder with the person who initiated the process.

1. Select the folder.
2. Click **Properties** from the menu bar or the right-click menu.
3. Set **Initiate process on document arrival** to **Yes**.
4. Choose the process name from the list. If the list is empty, see your service administrator, who is in charge of setting up the process workflows.
5. Click **Save**.

The folder and its subfolders are now available for use within the Oracle Process Cloud Service interface. Any files that are changed in the folder or new files uploaded in the folder trigger the process associated with the folder. You can override the inherited process for a subfolder but you can’t disable the association with a process.

To learn more, see Getting Started with Oracle Process Cloud Service.

3 Working with Structured Content

Structured content, available to enterprise users, is content that is managed separately from its layout or format. It's only available to enterprise users.

Topics

What is structured content?

"Structured content" is a term used to describe content that exists separately from any file or layout. When you create a Word document, for example, it's stored as a file and it has certain aspects stored with it: the text in the file, the font used for headlines and paragraphs, the margins for the file layout, and perhaps a page border or a picture used in the file.

When you use structured content, however, the *content* is managed independently of the content appearance. The elements of the content—the paragraph text, the headline text, the image file—can all be used wherever they're needed, either as one cohesive group or separately in different layouts and formats.

For example, let's say your company wants to create a website and one of the pages on the website will have contact information for employees. In addition, you want to have another page that has detailed information about the employees, such as a picture and a brief biography.

You could copy and paste the pertinent information into the appropriate spot, but what if the information changes? Then you would need to change the data in several places. A better solution is to use structured content.

How do I create structured content?

Structured content is composed of content types, content items, and optional digital assets, all working together.

A *content type* is a framework for content. It's like a "container" that specifies certain fields where you'll enter information. For example, you may have a content type called *Employee* and in it are fields for employee name, job title, phone number, location, profile picture, and biography. Different layouts can be associated with the content type, so the information that's entered using the content type can be formatted in different ways. For this example, there are two layouts. One has just basic contact information and one is more complete, with the employee name, picture, and biography. See How do I create and share content types? for the details.

A *content item* is the information that you enter using the content type. A content item always belongs to a collection, which is a way to manage all the content for a particular purpose. To continue the example, Deepa Patik, one of your employees, creates a content item using the Employee content type and she enters her name, and other information (job title, phone number, location, and brief biography). She can preview how her content item appears with the different layouts associated with the Employee content type. See How do I create content items?

A *digital asset* is a picture, a document, or a video managed separately but available for use in your website or in content items. In our example, Deepa adds her profile picture to her Digital Assets folder and then selects it to use with her content item. See What is digital asset management?

The content item and the digital assets can be grouped together in a *collection* to make it easier to find what you need for your website or project. Collections have policies associated with them so all the assets managed by a collection will follow those set policies. Collections can be shared with other people, so large chunks of content can be all used by other people at once. See How do I create a collection?

Different people in your organization may manage creating content types, creating websites, or creating content items. See Who can do what? for details about job roles. Keep in mind that your organization may have assigned roles and permissions to different people, so it's important to understand how it all works together.

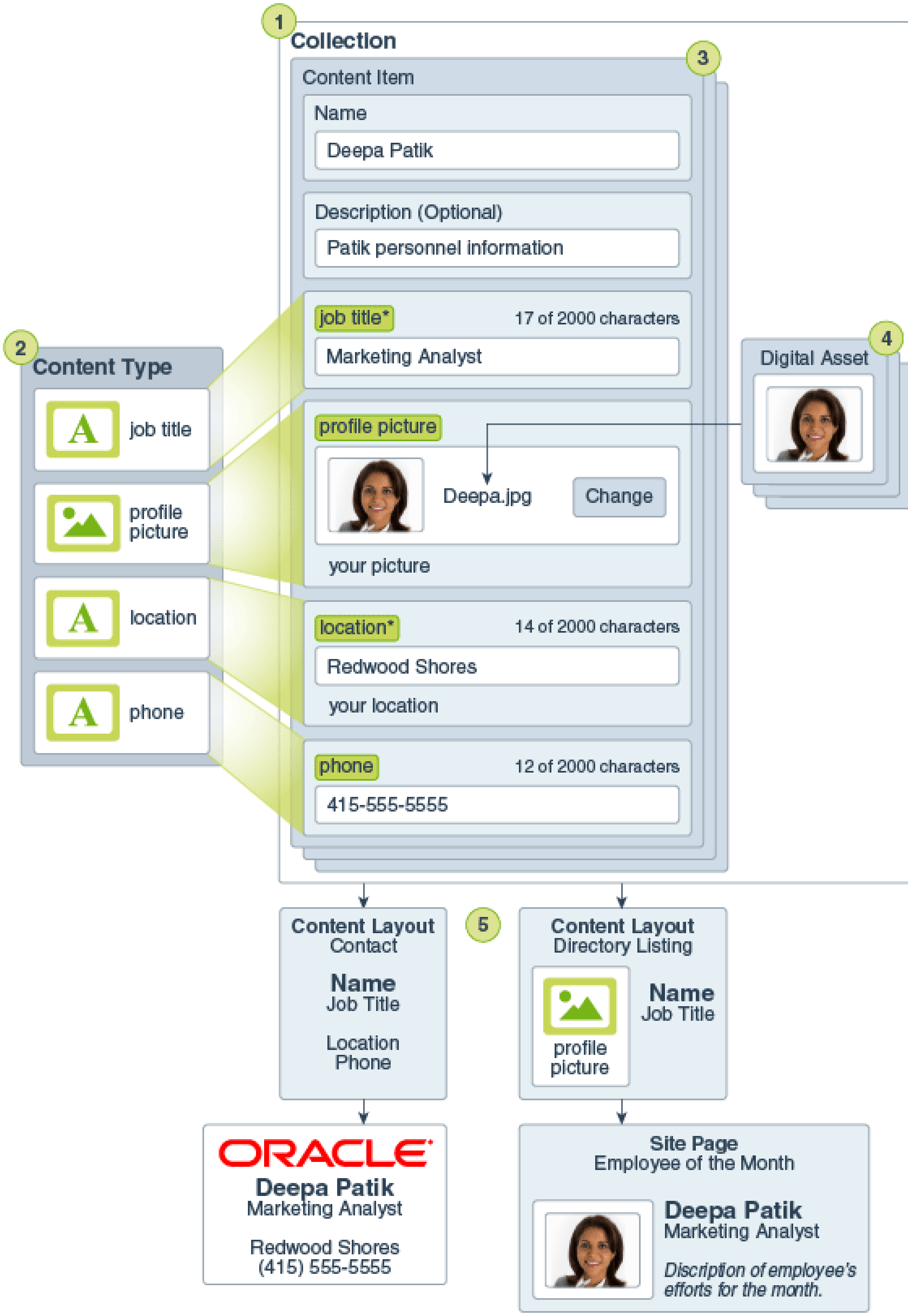
How and where do I use structured content?

Content items and digital assets can be used on websites or for other corporate communications.

Depending on your role in the organization, you may not actually put structured content to use. You may just create content items or add digital assets that are needed. See Who can do what? for information about roles and permissions.

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

- Templates and layouts for a website and content types are designed and deployed. This is usually handled by an IT designer with content administrator or site administrator privileges. Often those roles are given to one person, but some organizations may have different people in those roles.
- **Collections (1)** are created to manage the website elements. When a website is created a collection is automatically created, making it easy to manage all the content for the site. Or users can create independent collections to manage their digital assets.
- A person with a content administrator role designs the **content types (2)**.
- The content administrator must share the collection and the content types with users, then users can upload assets and create **content items (3)**.
- Contributors add the content items and upload the **digital assets (4)** for the website or project. When a content item is created, it's assigned to a collection so it can be managed with the collection's policies.
- A content type can have different **content layouts (5)** associated with it, letting you display the content in different ways.
- The IT designer or site administrator adds the digital assets and content items to the website or the project. On a website, the items appear as part of the content available to use on the site.


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

4 Working with Digital Assets

You can easily group digital content for a project into one manageable location so you have everything you need at your fingertips. Digital assets are only available to enterprise users.

A next-generation asset repository is being developed for an upcoming release. The new asset model will require migration of your content from the current model to the new one. This may be a detailed, manual process depending on the size of your asset repository and how assets are used. If possible, you may want to delay adding new asset projects until after the new asset model is released.

- What is digital asset management?
- How do I get started managing digital assets?
- What’s the difference between my Digital Assets folder and asset view?
- How do I add and remove assets?
- How do I tag content?
- How do I sort or filter assets?
- How do I change the status of a digital asset?

What is digital asset management?

“Digital asset management” is a way to group and manage all the assets that are used for one purpose, like in a website or for a particular project. You can add the files (“assets”) to the Digital Assets folder on your home page, or upload files directly to the asset view, shown when you click **Digital Assets** in the navigation panel. You can tag assets, too, by adding a keyword when you add the asset. This makes it easy to find and sort them later.

Assets can then be managed in collections, which groups all the items for one project or website in one place. When they’re in a collection, they’re managed using the policies for the collection. A policy is a rule that dictates how items in a collection will be handled. For example, one collection may have a rule that all assets in it be approved by a manager before they can be used. Or a collection may have a policy that all the items in it are to be available to use on the corporate website. By managing assets in collections, you can make sure that the assets are those that adhere to the policies you want to have enforced.

Digital assets also work with content items. If you associate digital assets with a collection, then those assets are available for use in a content item that’s also associated with that collection. For example, perhaps you’re creating a content item that has a field for an image. When you’re creating the item, you can choose an image from the collection for use in the content item. See What is structured content? and Working with Content Items and Collections.

How do I get started managing digital assets?

Digital asset management consists of two main steps: add your content and optionally tag it so you can find it easily later. Then manage those assets in a collection so everything you need is in one place.

Note: Digital asset management is only available to enterprise users. If you have a standard user role, you won't see the Digital Assets navigation option.

When you sign in to your account, you'll see an option in the left navigation panel called **Digital Assets**. When you select that option, a new folder is created for you called Digital Assets. And that's it. You're ready to start managing your digital content.

The Digital Assets folder has a special icon that's different than the others in your document listing.

Add your assets

- You can add assets to your Digital Assets folder or directly to the asset view. Just click or tap **Digital Assets** or in the navigation panel to open the asset view. See What's the difference between my Digital Assets folder and asset view?
- Upload items into your Digital Assets folder or into the asset view. See How do I add and remove assets?
- Tag your assets with keywords so you can sort and filter them later. See How do I tag content?

Discuss or annotate your assets

You can create conversations about assets in a collection just as you would any file. You can also add annotations to items, letting you discuss assets before they're published or made public. See Using Conversations to Collaborate for details.

Create a collection

You create and manage collections using your web browser. Collections are automatically created when a website is created, or you can manually create a collection.

When you start a collection, you're creating a way to manage all the assets in that collection in the same way. Assets aren't actually moved into a collection. They're just grouped together so you can manage them easily.

For example, you may have a collection that contains images that must be reviewed and approved before they can be published for use. Or you may want to have a collection that contains content which can be published only for internal or "secure" use. When you create the collection, you set the *policies* or rules for how the items in that collection can be used. See How do I create a collection?

What’s the difference between my Digital Assets folder and asset view?

The Digital Assets folder and the asset view on the navigation menu are different ways to look at the same thing.

Here’s what you need to know about your **Digital Assets folder**:

- It’s a system folder and it can’t be deleted, shared, or moved.
- Items added into the Digital Assets folder can be organized like in any folder. You can create subfolders, you can share subfolders, and you can upload and delete items.
- When you add or remove items from the Digital Assets folder, they’re added or removed from the asset view.
- You can rearrange items in the Digital Assets folder and it doesn’t affect what you see in the asset view. For example, you can create a subfolder and move files into that subfolder, but it won’t affect anything you see in the asset view. The folder structure in your Digital Assets folder is not reflected in the asset view.
- You can tag individual items in your Digital Assets folder. Select the item and click **Edit Tags**. You can also tag all items in a subfolder. For example, perhaps you have a subfolder that contains only images of animals. You can select the subfolder and click **Edit Tags**. Add “animal” as the tag and every file in the subfolder will be tagged as “animal.”

Here’s what you need to know about the **asset view**:

- Click or tap **Digital Assets** or  in the navigation panel to open the asset view.
- When you add items to the asset view in your browser, you can tag them with keywords to make it easier to find and group them later. For example, you could group all items tagged “trees” into a collection called “Horticulture.” That collection might contain items tagged “trees,” as well as items tagged “flowers” and “gardens.”
- When using your browser, you can manage other folders that have digital content. For example, maybe you have a folder called *Landscape* containing photos you want to include in a brochure. You can manage those photos from the asset view without moving the photos to the Digital Assets folder.
- You can’t delete items from the asset view. If an item was uploaded directly into the asset view, you can delete it by going to your Digital Assets folder. If an item is in another folder managed by the asset view, you can delete that item from that folder.

How do I add and remove assets?

Adding and deleting items for asset management are done in much the same way you do for files.

Adding items

You can upload items in a few ways, on a mobile device or in a browser:

- **In your Digital Assets folder**

  Open your Digital Assets folder and click **Upload** in your browser or tap on your mobile device. Add a file just like you'd add any other file to any other folder.
- **In the asset view**

  Click or tap **Digital Assets** or in the navigation panel to open the asset view.

  Click **Upload** in your browser or tap on your mobile device. Select your items and add them the same way you'd add them to any other folder. You can add tags to the files while uploading them and choose the collection where they'll be managed. Files are added by default to your Digital Assets folder. When using your browser, you can put them in a different folder if needed. Just select the link and select the folder where you want to add them.
- **In a collection**

  In your browser, click **Collections** or and select the collection to use. On a mobile device, tap the Collections menu at the top of your digital asset view screen and choose a collection from the list.

  Click **Upload** in your browser or tap on your mobile device. Upload a file the same way you do when adding files to folders.
- Drag and drop items from your computer desktop to the Digital Assets folder or the asset view. You can tag items while you upload them.

Items added into the Digital Assets folder, the asset view, or a collection are visible in the file listing in the Digital Assets folder.

"Adding" items from other folders

When using your browser, you can also manage items that aren't stored in your Digital Assets folder. The items remain where they're stored, but you can use them from the asset view.

Open the asset view and click **Manage Folders**. Your folder listing is shown, letting you select folders you can access that contain assets. Click the checkbox for the folder you want to use then click **Done**. Everything from that folder is added to the asset view. It doesn't matter if the folder contains items that you might not need (like .zip files). The files will show up in your listing along with the assets you want (such as image or video files).

Removing items

If you added items in your Digital Assets folder or directly to the asset view, go to your Digital Assets folder, select the item, and click **Delete**. If an item is published, you can't delete it (because it's in use).

If you added items by using the Manage Folders option in your browser, open the asset view and click **Manage Folders**. De-select the folder containing the items you want removed and click **Done**.

There is no way to remove *individual* items that you see with the Manage Folders option. When this option is used, you can only add all the contents of a folder, not selected items. One way to not use some items is to delete all tags for the items you don't want. They no longer appear in a search and thus won't be inadvertently used.

How do I tag content?

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

You can add tags to files when you upload them in the asset view or tag them after they're added, either in the asset view, in your Digital Assets folder, or in a collection. You can tag content items after they're created.

You can also tag any item you upload to your account. It may be useful to tag items, for example, in case you want to use them as a digital asset later. You can also search for items using a tag, so it can be a useful tool to help you find what you need quickly.

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

- Add as many tags you think you'll need. Tags can describe the item, the place, the year, the subject matter or whatever you need to identify the object. You decide what tags you need.
- When adding tags, press **Enter** after each tag. Click **Done** when you're finished adding all your tags.
- Tags aren't case-sensitive. "Lake" is the same as "lake" when you're tagging.
- You can use special characters, such as asterisk (*) and parentheses (), but avoid doing so. It can make searching for the tagged object difficult.
- You can tag all the digital assets in one folder. For example, in your Digital Assets folder, perhaps you have a subfolder with only images of people using mobile phones. You can select the subfolder and tag it "mobile". Every item in the folder will then be tagged with "mobile." If you change or delete the tags later for the folder, the tags for all the items are changed. If you add files later into the subfolder, they will have the tag you designated.

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

Add tags or edit tags when you upload to your asset view

1. Click or tap **Digital Assets** or in the navigation panel to open the asset view.
2. Click **Upload** or tap on your mobile device. Select the objects to add. Assets are added by default to your Digital Assets folder, but when using your browser, you can put them in a different folder that's used for digital assets if needed. Just click the link and select the folder where you want to add them. Only folders that hold digital assets are shown for selection.
3. Add the tags for the items or edit the existing tags. Press **Enter** after each tag. When adding tags in your browser, you can also separate tags with a comma, a hashtag (#), or a semi-colon (;) after each tag.

4. Click or tap **Done** when you're finished adding tags.

Add tags or edit tags in your Digital Assets folder or in a collection

1. Open the collection or your Digital Assets folder. To open the collection on your mobile device, tap the Collections menu at the top of the digital asset view.
2. Select the items. On your mobile device, tap ⋮ or ••• . Click or tap **Edit Tags**.
3. Edit the current tag or add additional tags.
4. Click or tap **Done** when you're finished.

Add tags or edit tags when viewing assets

1. View the asset either in the asset view or the collection.
2. When viewing from a collection in your browser, click ☰ and then click **Custom Properties**. When viewing it on your mobile device, tap **View Properties**.
3. Add or edit the tags.
4. Click **Done** when you're finished.

Add tags from your mobile device gallery

You can add photos from your photo gallery to Oracle Content. Open your gallery and select the photos you want to add. Tap and choose Oracle Content as your location. Find the account and folder you want to use and tap **Select** and then tap **Upload**. You can also add tags to the items as you upload them, helping you use them as digital assets later.

How do I sort or filter assets?

You can search for any assets the same way you search for other files or folders.

You can search for assets in the search box in your home page. Enter the asset name if you know it. Or you can enter a tag associated with the asset. All assets with that tag are returned.

You can also search from within a collection or within the asset view. Open a collection or your asset view and enter a tag in the search bar to find all assets with that tag.

To filter what you see, click or tap **Digital Assets** or to open the asset view. Click or tap to open the filter menu.

You can filter items by type or by status. When you filter by type, you can choose to view only images, documents, video, or HTML files. If you uncheck all boxes, you can view everything.

When you filter items by status, you can limit your view to items that have properties determined by the collection where they're managed. Each collection can have rules associated with it. For example, a collection may have policies that say the assets in that collection can only be published if they've been approved, or that only managers can approve assets. After those policies have been applied to the assets in the collection, you can then filter to see the following traits:

- Published: see assets that are marked as published and available for use.
- Approved: see assets that are approved according to the policies in the collection.
- Rejected: see assets that weren’t approved according to the policies.
- Draft: see assets that were published and now have a new version.
- In Review: see assets that are awaiting review for approval or rejection.

How do I change the status of a digital asset?

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

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

- The status of a digital asset can only be changed when you view the asset from within a collection. If you view the item in the asset view or your Digital Assets folder, you can’t change the status.
- Keep in mind that only managers or owners of a collection can change the status of an item. If a collection was shared with you and you don’t have a Manager role, you won’t be able to change the status. Also, you can’t unpublish or delete objects that are being used. It must be removed from the website where it’s used before its status can be changed.
- Note that if you upload a new version of a digital asset, it’s automatically labeled as Draft.

To alter the status of an asset **in your browser**:

1. Click **Collections** or .
2. Open the collection where the asset is managed.
3. Choose the new status from the menu bar or the right-click menu.

To change the status **using your mobile device**:

1. Tap **Digital Assets** or .
2. Tap the collection menu at the top of the screen and choose the collection.
3. If needed, tap to toggle between viewing the status and hiding the status.
4. For the asset you want to change, tap (iOS) or (Android).
5. Choose the new status for the item.

5

Working with Content Items and Collections

You can manage your digital assets with collections and manage content with content types.

- What are content types, content items, and collections?
- How do I create and share content types?
- How do I create content items?
- How do I use content items?
- How do I create a collection?
- How do I share a collection?
- How do I add and remove content and assets in collections?
- What does it mean to publish items in a collection?

What are content types, content items, and collections?

A content item is a block of information that you create using a content type. Content items and types can be created using your browser. You can’t create them or edit them on a mobile device.

A *content type* is a framework for information that can be used in a website or for other projects. A content type can have different layouts associated with it so that the information entered using that content type can be formatted in a variety of ways. You can think of a content type like a form, where information is entered and saved. Then that information can be used later with different layouts or formats. You can only create a content type if you have content administrator privileges.

A content type has to be shared with someone in order to use it. If someone created content types but you don’t see them in the listing when you try to create a content item, check to make sure the content types were shared.

A content type might require text, a date, an image, or a variety of numerical fields. It all depends on what’s needed. There may be several different layouts associated with a content type, so depending on where your item is needed, it might appear with a large picture and small typeface, or a small picture with wraparound text. The location and contact information may be omitted in one place or included in another. The content itself won’t change, but the layout can change without affecting the actual content that you entered.

For example, perhaps there’s a content type called Employee Information. It might have fields for a job title, geographical location, a brief biography, and a picture. When you use that content type to create a *content item*, you choose a collection where the content item will be managed. Then you enter specific information: your job title, location, some information about yourself, and you’ll choose a picture from your digital asset collection to use with the content item.

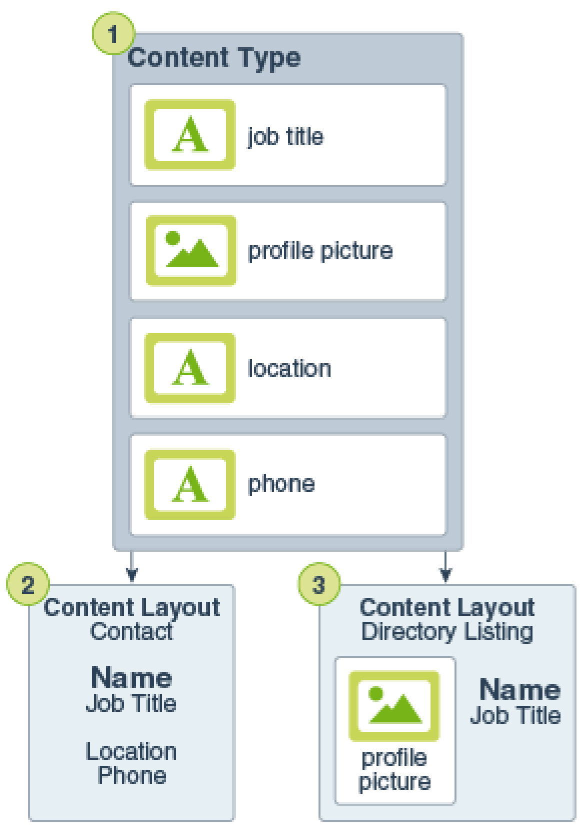
The content item becomes a part of the *collection*. There might be photos, videos, or documents in the collection, all of which can be used on a website, or in a brochure, or wherever it might be needed. A collection is a way to manage all the things you need for one project in one place.

Content types, content items, and collections are all used in conjunction with digital assets when managing structured content. For more details, see Working with Structured Content.

How do I create and share content types?

A *content type* is a framework used to specify what information is included in a content item.

Content types (1) can have **layouts (2)** associated with them, which will determine how they appear and what information will be used in that particular layout. For example, you may only want a subset of information to appear on an employee contact list, but you might want an employee picture, location, and job title appear in another location on your website. When you create a content item using a content type, you can preview how it will look with different layouts.



In order to create a content type, you must have content administrator privileges. After it's created, you need to share the content type with others so they can use it to create content items. Those content items can then be used on a website, or in a brochure, or wherever they might be needed.

1. Log in as a content administrator in your browser and click **Content Items**.
2. Click **Manage Types**.

   If you don't see **Manage Types**, you probably don't have the content administrator role. Contact your service administrator for help.
3. To create a new content type, click **Create**.
4. Enter a name and description for your content type.
5. Select an image to represent your content type, and click **OK**.
6. Drag as many data fields as you need into the content type definition.
7. On the settings page for each data field:
   - Enter a name and description for your data field.
   - Optionally, edit the unique ID for the field.
   - If you selected text, media, or reference, select whether the field allows only a single value or multiple values and the number of values allowed.
   - Select if the field is required when users submit the content.

   Click **Next** after adding each data field to define the appearance for the field.
8. On the appearance page for each data field, set what your data field will look like and if you want to apply any kind of validation. Each data field has different appearance values, such as validation, minimum or maximum length, the type of text editor to use, or if the data needs to follow a particular pattern, such as a valid email address or zip code.
9. On the **Content Layout** page for the content type, select the layouts that are associated with this content type. If the content item created using this type will be used on a website, the content layouts should be created and uploaded prior to creating a content type. You can associate additional layouts by clicking **Add Layout Style** then entering a name and choosing a layout. See Managing Custom Components and Layouts for details about creating content components.

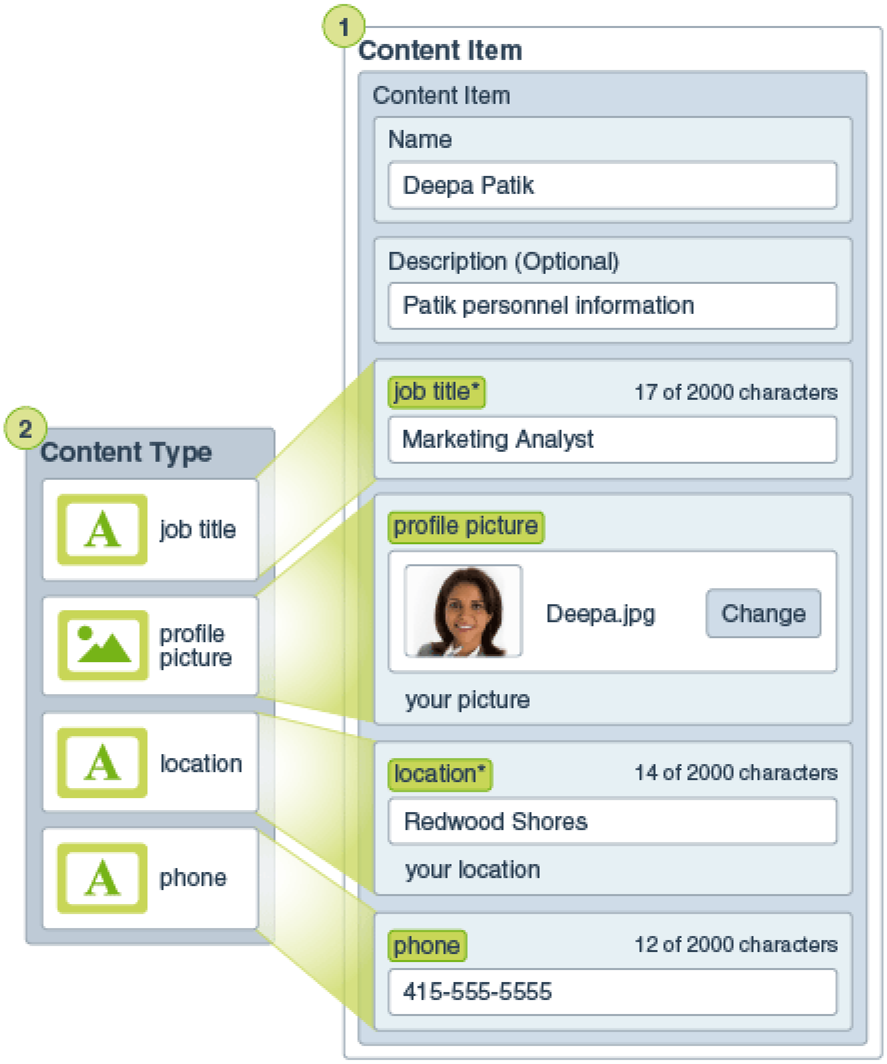
   When a content item is created using this content type, the person creating the item can preview how the content item will appear using any of these layouts.

> **Note:**
>
> You must share a content type with others in order for them to use it. Sharing a content type is like sharing any file or folder. Just select the type, click **Members**, and choose members to add to the type and choose the role they can have when using the type. You can share with individuals or with groups.

How do I create content items?

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

You create a **content item (1)** using a **content type (2)** , which defines what fields are used in the content item. Content types are created by people with content administrator permissions. Any enterprise user can create a content item if content types are defined and shared with them. See Who can do what? for details about roles and responsibilities.



To create a content item:

1. Click **Content Items** or in the navigation panel in your browser.
2. Click **Create Item**. If you've created content items before, the last 5 types you used are shown. Otherwise, select the content type you want to use from those shown.

> **Note:**
>
> Content types must be shared with you before you can use them. If you don't see a content type you expect to see, contact the person managing content types to see if it was shared.

3. Enter a name and an optional description for the content item.
4. Choose a collection where the item will be managed. A content item can only be associated with one collection and that collection can't be changed once the content item is saved. Select the collection and click **OK**.

5. The Create Content Item screen is shown with the fields that are needed for that content type. You can edit the name and the description you just used if needed.
6. Enter information into the necessary fields. If media is required, click the **Select** button. All digital assets are shown. Choose one for use with the content item and click **OK**. If the asset was not already in the collection, it will be added to the collection after you save the content item.

You can add tags to the content item once it's managed in the collection. Go to the collection where the content item is managed, select the content item, and click **Edit Tags**. See How do I tag content?

You can also create a content item from within a collection. Click **Collections** or . Open the collection and click **Create Item**, then follow the steps outlined here to add a content item.

You can preview how the content will look with the different layouts associated with the content type. Slide the toggle switch to **Preview** to use the layout options to see how the item will look on different devices and with different sizes. Several sizes are given and you can create your own device size. Click to see markings. Click an interval on the ruler to quickly see how the site appears at different sizes. You can also select to see how a site will appear on a mobile device depending on orientation.

When you're satisfied with the content you created, click **Save** then **Close** to exit the Create Content Item screen.

To edit a content item, click **Content Items** or in the navigation panel. Select the content item and click **Edit**. To delete a content item, select the item and click **Delete**.

To duplicate a content item, go to the collection where the item is managed and select the content item. Click **Duplicate** from the menu bar. A new version of the content item is created with "Copy" appended to the name. You can edit the item as needed without affecting the original version.

You can also add tags to the content item. This can help you find the item quickly later. Just open the collection and select the content item. Click **Edit Tags**. Add your tags and click **OK**. See How do I tag content? for more details about tagging.

How do I use content items?

Content items can be used on a website or in another communication output.

Remember that a content item is created using a content type as a guide. Most content types are tailored to fit a particular need in a website or other type of output. Therefore, content items are always associated with only one collection, whether that collection is one used with a website or one that was created manually. If you want to use a content item on a different website or have it available in a different collection, you'll need to create it again and choose the other collection when you create it.

After content items are created, they're available for use on the website associated with the collection. Anyone with a contributor role for the website can add it to the site by selecting it and dragging it and dropping it to the website in any slot that accepts content.

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

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

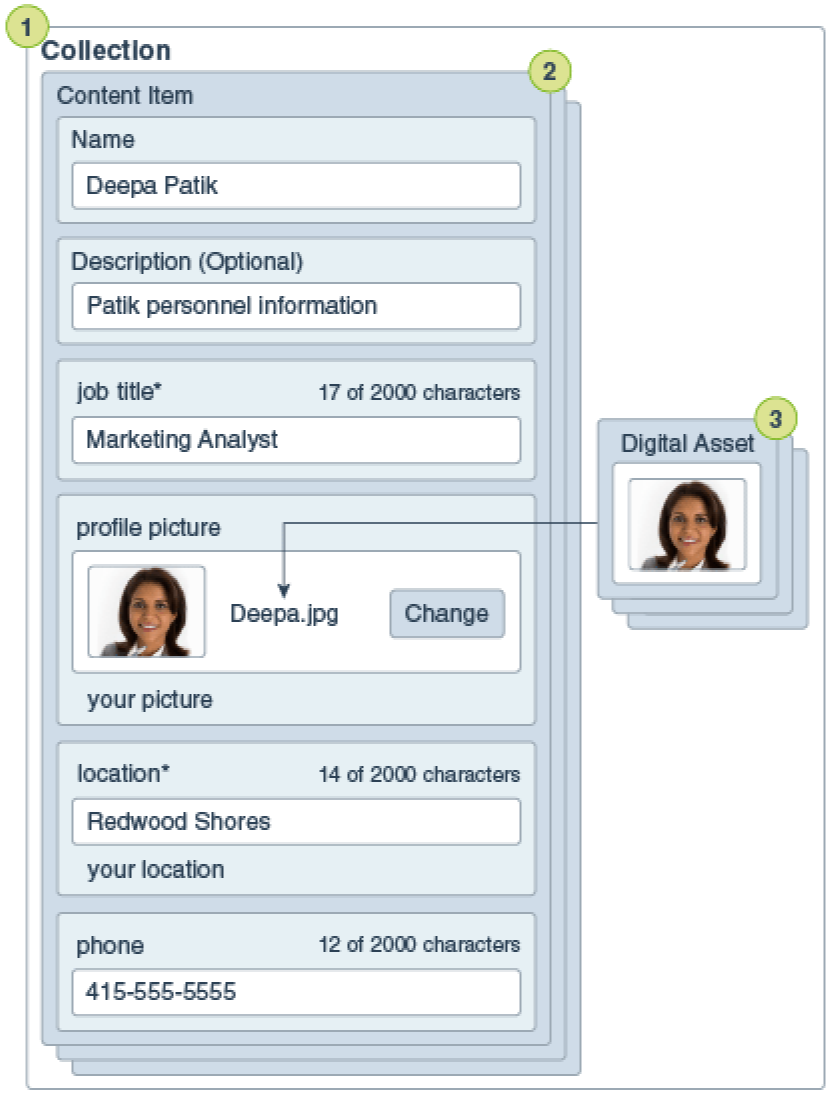
Then you can edit *News Today* every day and change the text included in the item and publish it. That changed text will be reflected on the website without any need for someone to update the website daily. The content changes independently of the website.

How do I create a collection?

Collections are a way to group content items, digital assets, and documents for use on a website, external application or for marketing campaigns.

When you create a **content item (2)**, you choose a **collection (1)** where it will be managed. You can also designate **digital assets (3)** to be managed in a collection. That way you can use digital assets in a collection with the content items in a collection, letting you keep all the objects you need in one place.

Collections have policies associated with them that dictate how the content in the collection is used. For example, a collection might have a policy that all content in it be approved by a manager before it can be used. The policy applies to everything managed in the collection—content items and digital assets.



A collection is automatically created when you create a website, or you can create one manually. You can set rules for that collection that affect all the items associated with the collection, allowing you to manage when assets are published, for example, or where assets can be used.

1. To create a new collection, click **Collection** or  in the navigation panel in your web browser.
2. To alter the rules for a collection (either one you created or one created when a website was created), select the collection and click **Properties**. Set the following properties for the collection:
   - Click **Logo** to upload an image to use as the avatar for the collection. For example, if you're working on a tourism guide for a lake, perhaps upload a picture from the lake to readily identify that collection with that campaign.
   - Click **Policies** to set the following rules to be applied to **all items** in the collection:

  - **Publish Target**: Choose where a published item in the collection will be available, either Public or Secure. A publishing target is a logical destination such as a site, or an external application. If the collection is associated with a website, you can't change this value.
    - A *Public Target* requires no authentication. The object can be used on a website or other location that will not require authentication to be seen.
    - A *Secure Target* requires authentication. The object can only be used where authentication, such as a sign-in prompt, will be enforced.
  - **Publish Policy**: Choose what rules must be enforced in order to publish an asset. You can choose to allow anything to be published, or restrict publishing to those items that were approved by the managers of the collection.
  - **Approval Policy**: Choose if managers must approve assets or if no approvals are needed.
- Click **Collection** to modify the name or description for the collection.

3. Click **Done** when finished.

Viewing collections

To see a list of collections, including those shared with you:

- Web browser: Click **Collection** or  in the navigation panel.
- Mobile devices: Tap **Digital Assets** or  in the navigation panel to open the Asset View. Tap the dropdown menu next to the heading to see a list of collections.

How do I share a collection?

When you share a collection, you share all the assets in the collection, including content items.

Collections can be shared with other people so they can use your assets, even though they don't have a copy of the assets. Sharing is done the same way you share folders: select the collection, click **Members**, and add members to the collection.

This means that even if you have no digital assets in your asset view, if someone shared a collection with you, you'll see the assets from that collection.

It's important to understand how sharing works:

- You must have a Manager or Owner role for an asset to add it to a collection.
- If you share a website collection with someone, that person is automatically added to the website with a Downloader role. You can change their role later if needed. And if someone shares a website with you, then you'll see the site's collection.
- Anyone with a Manager role can share a collection with someone else. The new person is given the maximum security that's a combination of the role they have on the collection and the role they have in the folder where the content resides.
- Any person given a Manager role on a collection can add those assets to other collections, including collections that the original owner doesn't know about.

- All the assets you can access are shown when using the All filter. But only the assets where you have the Manager role can be added to collections.
- You can share a collection with someone but you can't share with a group.

How do I add and remove content and assets in collections?

You can use collections to manage everything you need for a website or a project, making sure everything adheres to the rules you set.

When you create a content item, you specify the collection where it will be managed. Content items can only belong to one collection. If you need to move an item to a different collection, you need to recreate the item with that collection specified. To remove a content item from a collection, open the collection, select the item, and click **Remove from Collection**. To duplicate a content item, go to the collection where the item is managed and select the content item. Click **Duplicate** from the menu bar. A new version of the content item is created with "Copy" appended to the name. You can edit the item as needed without affecting the original version.

There are a few ways to associate a digital asset with a collection **in your browser**:

- Click **Digital Assets** or in the navigation panel to open the asset view. You can filter the assets by searching for a tag (for example, only pictures that were tagged "lakeside"). You can also use the Filter options to show only certain types of items (for example, just images) or items of a certain status (published, unpublished, and so on). Select the item and click **Add to Collection** or **Remove from Collection**. Choose the collection from the list and click **OK**.
- When creating a content item, you can select any item in your asset folder. When you select the collection to use with the content item, the asset will be automatically added to the collection after you save the content item.
- Click **Collection** or in the navigation panel. Open the collection where you want to add the asset. Click **Upload** and find the item you want to add. You can add tags when it's uploaded. If you change your mind and decide not to add it to the collection, uncheck the collection checkbox. The asset will be added to your Digital Assets folder, but it won't be associated with a collection. To remove an item, select it and choose **Remove from Collection**.
- If you want to associate an asset with multiple collections, you can select the asset again in the asset view and select another collection. Or you can find the asset in the collection by clicking **Collection** or in the navigation panel. Select the collection and then select the item. Choose **Add to Collection** to associate the item with another collection.

To associate a digital asset with a collection **on your mobile device**, tap **Digital Assets** or in the navigation panel to open the asset view. You can filter ( ) to show only certain types of items (for example, just images) or items of a certain status (published, unpublished, and so on).

- On your iPhone or iPad, long-press the item and tap **Add to Collection** or **Remove from Collection** from the bottom menu. Choose the collection from the list. On your Android device, select the item and choose **Add to Collection** or **Remove from Collection** from the menu. You can select multiple items to add to a collection.

- Tap then tap or . Tap **Add to Collection** or **Remove from Collection**.
- Tap the Collections menu at the top of the screen. Open the collection where you want to add the asset. Tap and find the item you want to add. You can add tags when it's uploaded. Tap **Add** when you're ready to upload the asset. To remove an item, long-press on the item on your mobile device and tap Remove from Collection from the bottom menu.

You can add an asset to more than one collection, but you must add it to each collection individually (you can't select multiple collections at one time).

What does it mean to publish items in a collection?

When you publish the items in a collection, those items are available for use via the Content Delivery API. You can only publish assets from your browser. You can't publish them from your mobile device.

Publishing policies and targets are set up when you create a collection or are added when a collection is created for a website. A target is a logical destination, such as a website or a mobile application. A publishing target can be public, such as a website that's external-facing, or it can be secure, for internal use only. Once a target is assigned, you can select all the items in the collection or individual items to be published to that target. When it's published, then it's available to be used in the target.

Using the published version of an asset lets you publish your website immediately, without waiting for a content item or asset to be approved. If a website is built with assets in a draft or pending state, then the approval and publishing policies that are assigned to the collection control when the site can be published.

Digital assets can be included in several collections which have different publishing targets. For example, an image might be published in one collection but not published in another. If an asset is published, a "Publish" notation appears on the image, letting you know which are published.

6 Keeping Everything Synchronized

The desktop app lets you keep your cloud files and your local files all in sync.

- What can I do with the desktop app?
- How do I sync files in multiple accounts?
- How do I set my notifications and preferences?
- How do I start syncing my content?
- How do I manage my synced files?
- How do I pause or stop syncing?
- Where are my synced files stored?
- How do I share files and folders?
- How can I use conversations to collaborate with others?

What can I do with the desktop app?

The desktop app keeps files and folders on your computer desktop synchronized with your files and folders in the cloud.

It's easy to do. Just install the client software. You set up an account and the software will set up a folder for you on your desktop, with the name you give the folder. You can choose the folders in the cloud that you want to sync, and they're put into that desktop folder to be synced whenever the app starts. This includes your content folders as well as your Digital Assets.

You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all your folders, it may take some time for the sync process to finish depending on how many folders you have.

You can also directly add files and folders into your desktop folder and they'll be added to your cloud account. The files are available to use in your browser or a mobile device. All your information stays up-to-date while the sync client is running.

If your company has several Oracle Content and Experience Cloud accounts, you may be a member of more than one service. If you are, then you can add up to five accounts to your desktop app.

You can also set notifications, letting you know when the conversations you're active in are changed. You can customize what notifications you'll receive so you can follow only those conversations that are important to you. You can also share your files and folders, just like you do when you use a web browser.

How do I sync files in multiple accounts?

You can set up a maximum of 5 separate accounts for each Oracle Content and Experience Cloud account you have.

Select **Preferences** from one of the menus:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).
- Click and then click .

On the Preferences menu:

1. Click **Add**.
2. Enter the server URL for the account you want to use.
3. Enter the user name and password for the new account.
4. Add an account name. The account name is used for the folder created on your computer that holds the synced files.

After setting up your account, click again. Select **Choose Folders to Sync**. You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all folders, it may take some time for the sync process to finish depending on how many folders you have.

How do I set my notifications and preferences?

You have two ways to access menu options to update your preferences or notifications:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).
- Click and then click .

Setting preferences

To check and change your preferences, choose **Preferences** from one of the menus. You can adjust the following settings using the Preference screen:

- add a new account
- choose whether to start the app automatically when you sign in on your computer
- show or hide the radial menu that appears when you use Microsoft Office programs such as Word or Excel (Windows only)

Setting notifications

You can set what kinds of notifications you'll receive about your conversations. For example, you can be notified by a popup message if someone assigns a Please Reply flag to you in a conversation, or if someone adds you to a new conversation.

To manage notifications about synced content, open the Preferences menu. Select **Receive Activity Notifications**. Click **Choose Notifications** to select the type of notifications you'd like to receive and how you're notified.

You can disable all notifications if needed (for example, during a conference call or a webinar). Select **Disable notifications** from the menu. To start them again, select **Enable notifications**.

How do I start syncing my content?

After installing the desktop app, connect to Oracle Content and Experience Cloud with your user name, password, and the URL for your service. If you're not sure about any of your sign-in information, talk to your service administrator (the person in charge of running your service).

When you first install the app, you're prompted to choose what folders you want to sync. If you install it and don't go through that process, you can always click in the notification area (Windows) or in the menu bar extras area (Mac). Select **Choose Folders to Sync**.

You can automatically sync all the folders you own (the default selection when you first install the app) or you can choose folders to sync, including those shared with you. If you choose to sync all folders, it may take some time for the sync process to finish depending on how many folders you have. You don't have to do anything more. The desktop app is "set and forget" software. It runs until you tell it to stop.

You must have at least a Downloader role in a folder for it to appear in your list of folders for syncing. If you're building websites, you can also sync themes, templates, and other assets associated with your sites. You must have a manager role for those items in order to see them in the list of items available for syncing.

When you initially signed in, a desktop folder was created for you named Oracle Content by default. This is where you can add files and folders you want synced to the cloud. To view the contents in Windows, double-click the folder icon on your desktop or click the icon in the notification area and then click **Go to Oracle Content Folder**. On a Mac, open the context menu for the icon in the menu bar extras area then click **Go to Oracle Content Folder**.

How do I manage my synced files?

You manage many sync tasks using the context menu for the app in the notification area (Windows) or menu bar extras area (Mac). Just right-click to see the options.

Many of these options are also found when you click to open a dialog that shows sync status and other information. Click to access additional menu options. You can also choose **Disable Animations** to stop the automatic updating of information in the dialog.

Task	Description
Sync folders from the cloud	Select **Choose Folders to Sync** and click the checkbox for items to sync. To stop syncing, de-select the item.
Pause sync of all folders	Select **Pause All Sync**.
Investigate sync problems	Choose **Sync Problems**. To view sync problems for a specific folder, right-click the folder in the desktop folder and select **Sync Problems** from the right-click menu.
Go to Oracle Content folder	Select **Go to Oracle Content Folder** and choose the account you want to use.
Open the cloud version of a folder	Select **Open in Oracle Content in a Web Browser**.
Stop all notifications	Select **Disable notifications** to prevent all your notifications from appearing (for example, during a conference call or a webinar). To re-enable them, select **Enable Notifications**.
Change the location or name of an account folder.	Select **Preferences**. Select the account folder you want to use then click **Edit**. Click **Change Location**. It may be useful to put your content on a drive with additional storage space. If you move an account folder to a different drive, you must re-sync all the folders.
Save a log file showing the sync transactions on your desktop	Choose **Troubleshoot** from the Help menu then choose **Save Logs**.

The following options can be accessed by finding the item you want to use in the Oracle Content folder on your desktop, and right-clicking on the file or folder. Select **Oracle Content**, then select the appropriate option.

Task	Description
Open the cloud version of a folder	Select **Open in Oracle Content in the Web** .
Reserve a file	Select **Reserve**. You can also reserve a synced file by opening the file and clicking  on the radial menu when editing a Microsoft Office file.
Investigate sync problems	Select **Sync Problems**.
Share a synced file or folder	You can add members to a folder or send a link to a file or folder the same way you do when using a web browser or mobile device. Right-click on the item name in the desktop folder and choose **Members** or **Share Link** in the Oracle Content context area.
See the properties of a folder	Select the file in your Oracle Content folder, then choose **Oracle Content** and then **Properties**.
Rebuild a synced folder	Select **Rebuild Folder**. You may need to do this if the folder has sync problems and no other actions fix them.
Delete the local and cloud copies of a folder	From a top level folder, select **Delete from Cloud** to send the folder to your Trash folder in the cloud.

How do I pause or stop syncing?

Most of the time you can let the desktop app do its job and always sync your files. But sometimes you may want to temporarily pause sync or maybe stop it completely.

You have two ways to access menu options to change syncing behavior:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).
- Click and then click .

Pausing

You can pause sync if you have a slow connection and need to improve the performance of other online tasks. For example, you may want to pause sync if your connection is slow and the online training video you are viewing is stuttering, or if a download keeps failing.

Access the sync menu using one of the above methods and choose **Pause All Sync**. To resume sync, choose **Resume All Sync**.

When you resume sync, changes you made during the pause are applied, and any conflicting changes in the files need to be fixed.

Stopping

You can also stop syncing a folder completely. Click or right-click and select **Choose Folders to Sync**. De-select the folder or folders that you want to quit syncing.

If you stop syncing a folder on a computer, the folder and its files are removed from the Oracle Content account folder on that computer. Nothing is lost because the folder and its files remain in the cloud and on any other computer you have synced. You can restart sync of the folder later.

Where are my synced files stored?

If you have only one account, your synced files are stored in folders in the Oracle Content folder on your computer. If you are a member of multiple services and sync more than one account, then your synced files are stored in a folder that you name when you add each account.

In Windows, the default location for the Oracle Content folder is:

- C:\Users*USER_NAME*\Oracle Content-Accounts

On a Mac, the default location for the Oracle Content folder is:

- /Users/*USER_NAME*/Oracle Content-Accounts

You can change the location of the Oracle Content folder. Select **Preferences** through one of these methods:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).

- Click and then click .

Select the account folder you want to use. Click **Edit** and then **Change Location**. You can’t move the location to an external drive.

How can I use conversations to collaborate with others?

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Using Conversations to Collaborate.

How do I share files and folders?

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Sharing Your Content and Sites with Others for more details.

7

Working with Microsoft Office

There are a couple of ways to make working with Microsoft Office software easier.

- What can I do with the Microsoft Office add-on?
- How do I add Oracle Content as a storage option?
- How do I use the radial menu that's installed?
- How do I add links to items in Microsoft Outlook?
- How do I edit files?

What can I do with the Microsoft Office add-on?

When you install the desktop app, an add-on for Microsoft Office 2010 or later versions is automatically installed for you. The add-on gives you a radial menu that's available whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access features directly from the Microsoft Office application.

You can easily embed links to your synchronized documents, folders, or most recently used conversations into Outlook email messages. Click the **Insert Link** option and choose what kind of link you'd like to add.

If you install Microsoft Office after you install the desktop app, you'll need to reinstall the desktop app to get this functionality. It's only installed if Microsoft Office is present on your computer.

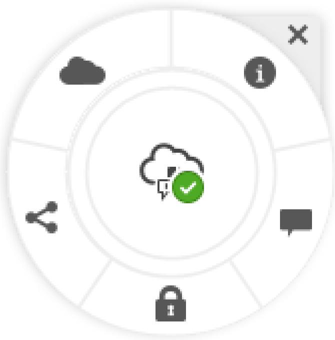
How do I add Oracle Content as a storage option?

If you are using Microsoft Office 2010 or later versions, you can add Oracle Content to the storage location in your backstage area. Open a Microsoft Office program such as Word. Select **Save As** and click **Account**, then click **Add a service**. Select Oracle Content. From that point on, your Oracle Content account appears as a place in the **Open** and **Save As** panels when you use an Office product such as Word or Excel.

Oracle Content also appears as an option under the File tab in Microsoft Office. You can use options such as saving files, collaborate, and more from within Microsoft Office.

How do I use the radial menu that's installed?

When using Microsoft Office 2010 or later versions on a PC, a quick-access radial menu is installed automatically when you install the desktop app. This menu appears whenever you have the app active and you work with a Microsoft Office file that's being synced. Click on any location on the menu to quickly access Oracle Content features directly from the file. You can view the properties of a file, work with reservations or share the file, view conversations associated with the file, or open the file in Oracle Content in your web browser.



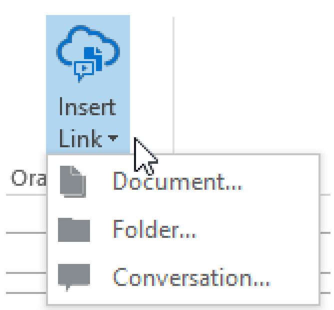
To hide the menu, click on the menu to minimize it and then click the X. To reinstate the menu, open a Microsoft Office file and click **File**, then click **Oracle Content** and then **Preferences**.

You can also show or hide the menu by right-clicking on the desktop app icon in your notification area on your computer. Choose **Preferences** and then **Hide Radial Menu** or **Show Radial Menu**.

How do I add links to items in Microsoft Outlook?

When you install the desktop app, an add-in is installed for Microsoft Outlook, letting you easily embed links to your synchronized documents, folders, or conversations into email messages.

1. Make sure your app is running. To verify, check for  in the system tray.
2. Open Microsoft Outlook and compose a message.
3. Click **Insert Link** in the Outlook ribbon.
4. Choose **Document**, **Folder** or **Conversation**, depending on the kind of link you want to insert.
   - If you're adding a link to a document or folder, navigate to the item in your sync folder for the link you want to insert. Select **Member Link** or **Public Link** from the bottom of the screen. If you're adding a public link, you can click the **Link Options** button to change the permissions for the link, the link name, expiration date, or access code.
   - If you're adding a conversation link, choose from the list of your most recently used conversations.
5. Click **Insert**. The name of the conversation, document, or folder is added to your email message as a link.



How do I edit files?

You can edit files stored in Oracle Content and Experience Cloud and if you have the desktop app installed, any changes you make to the file will then be synced to any device synced with your account. See How do I edit files on my iPhone or iPad?, How do I edit files in my browser?, or How do I edit Android files? for details.

8
Using the Android Mobile App

You can access your cloud files from anywhere while you're on the go. Just use the mobile app on your Android device to stay in touch wherever you are.

The Basics

- How do I sign in or sign out?
- How do I access multiple Oracle Content accounts?
- How do I set a passcode?
- How do I manage notifications?

Managing Content

- How do I manage files and folders?
- How do I manage digital assets?
- How do I view files?
- How do I view details about files and folders?
- How do I upload files and media?
- How do I edit Android files?
- How do I search?
- How do I sync my Android files with the cloud?

Collaborating with Others

- How do I send a direct message?
- How do I share files and folders?
- How can I use conversations to collaborate with others?

How do I sign in or sign out?

1. Tap the app icon on your device to open it.
2. Enter the URL of the host server.
3. Enter your account information at the prompts.
4. Tap **Sign in**.

If you don't have an account or can't remember your user name, password, or the server URL, talk to the service administrator in charge of managing your cloud accounts.

You're kept signed in on your device until you sign out. If you don't use the app for a week, you'll need to sign in again.

How do I set a passcode?

Passcodes are four-digit numbers you set to lock the app when you're not using it.

If you leave your device unattended and don't return within a specified time, you must enter the passcode. This helps to prevent access to the app if your device is left active where others could use it.

1. Tap to access your settings.
2. In the **Security** section, tap **Enable Passcode**.
3. Enter the four digits to use as a passcode, then re-enter the digits to confirm. Tap **OK**.
4. Tap **Prompt for Passcode** and choose the amount of time that has to pass before you need to enter the passcode.

   For example, if you choose `After 1 minute`, then you leave the app and return after more than one minute, you have to enter the passcode to use the app again.

To disable the passcode, follow the same steps but tap **Enable Passcode** to switch the passcode off.

To change a passcode, follow the same steps, but choose **Change Passcode**.

> **Note:**
>
> When you set a passcode to take effect immediately, you aren't prompted for the passcode if you minimize the app and it's restored within 5 seconds. This is expected behavior for an Android device and not an indication that the passcode hasn't been set correctly.

How do I access multiple Oracle Content accounts?

You can use files from multiple accounts and you can easily switch between accounts while using your app. To add an account:

1. Tap .
2. Tap **Add Account**.
3. Enter a name for the account, your user name, password, and the server information.
4. Tap **Add** when done.

You can add a maximum of 5 different accounts. To switch between accounts, tap the account name at the bottom of the navigation pane.

How do I manage files and folders?

To create a new folder, go to the location where you want the folder and tap +. Tap the folder icon and then enter a folder name and optional description. You can't use symbols such as / \ ? or * in the name. Tap **OK** when done.

Many of the other actions you might want to perform, like copying or moving files and folders, can be done by tapping ⋮ or by going to the Properties page. Actions you can perform include the following:

- **View Properties**: tap to view the properties for the item and access other actions you can perform, such a reserving or deleting an item.
- **Open With** (files): lets you choose an app on your device to use for opening a file.
- **Open Folder**: opens the folder so you can see a list of contents.
- **Favorite**: used to mark an item as a favorite. To see a list of your favorites, open the dropdown menu next to the header on the home page. Select **Favorites**.
- **Preview** (files): lets you view a file.
- **Members**: used to share an item with others by adding them as members to the folder.
- **Share Link**: used to create a link to a file or folder that you can share with others.
- **Send** (files): lets you send a copy of a file using an app on your device.
- **Sync** (files): used to keep your file copy synchronized with the copy in the cloud.
- **Reserve/Clear Reservation** (files): used to manage file reservations.
- **Delete**: lets you delete a file or folder.
- **Copy**: used to copy a file or folder to a new location.
- **Move**: used to move a file or folder to a new location.
- **Rename**: used to rename a file or folder.

If you're a member of a shared folder, you may not be able to create a subfolder in the shared folder. You also may not be able to delete or rename a file or folder. It depends on the role you were assigned when you were added to the folder. If you can't perform an action, the action isn't shown.

Tips

Deleting items

- If you want to delete a shared folder or a file in a shared folder, you may not be able to do it if your role doesn't allow it. For example, if you have a Downloader role in a folder, you can't delete files.
- Deleted items are moved to the Trash folder. You can permanently delete or restore the item from there. Items stay in the Trash until one of these events happen:
  - You permanently delete them.
  - Your Trash quota is reached.

   – The Trash is automatically cleared out, according to the interval set by your service administrator, the person in charge of managing the service for your organization.
   – You restore the item from the Trash.

  You can see your Trash folder by going to the home page and tapping the menu under the heading. Tap **Trash** to see what's in the folder.

Copying items

If you copy a file to the original location, it's saved with a number after the file name indicating it's a copy. For example, if you already had a file named *Status Report.doc*, a new copy of it is named *Status Report(2).doc).*

Reserving files

- When you reserve a file, other people will know the file is in use. You can check the properties for the file to see who reserved it and when.
- Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.
- If someone tries to upload a new version of a file you reserved, they can clear the reservation and upload the new version. You'll be notified by email if that happens.

How do I manage digital assets?

Digital assets are those items you want to group together for use on a website or for other projects.

Digital asset management is a way for you to upload and process the items you may need for a project, whether it's a new website, a microsite, or some other campaign. You can use your mobile device to upload, review, and approve or reject digital assets, including ones that are shared with you. You can also tag assets when they're uploaded, which helps you sort and filter items later.

Your assets—files, videos, or content items—can be uploaded to your Digital Assets folder or directly into the asset view.

- Open your Digital Assets folder from your home page and tap +. Add a file just like you'd add any other file to any other folder.
- Tap **Assets** in the navigation panel to open the asset view. Tap +, select your items and add them the same way you'd add them to any other folder.

Digital assets can be managed in collections, which are created and customized in a web browser. Collections have policies that dictate when the assets in the collection can be used. You can add assets to collections by opening the asset view. Tap and then tap ⋮ for the asset. Tap **Add To Collection** . Select a collection from the collection menu.

A collection may have rules that restrict assets from use unless they've been approved by management. These collection policies apply to every asset in that collection. If someone shares a collection with you, you'll see the digital assets from that collection in your asset view when you tap **Assets**.

Assets can be routed for approval if a collection has approval policies in place. To see the approval status for an item, tap **Assets**. Tap the collection menu at the top of the screen and choose any collection listed there. Tap to show or hide the status. You can tap to see the options available to change the asset's status.

See Working with Digital Assets to find out more about managing digital assets.

How do I upload files and media?

1. Go to the location where you want to add the file.
2. Tap .
3. Tap .
4. Choose a file to upload from your device. You can edit the file name and add an optional description. You can also add a tag if you plan to use the item as a digital asset. Tap **Upload** when done.

You can also **take a photo and upload it**. Just tap . You can choose any photos you currently have, or take your photo and then upload it.

You can upload files from one Oracle Content account to another. For example, perhaps you have two accounts, User A and User B. If you sign in as User A, select the **Upload File** option. Select Oracle Content as the location you want to choose from and select your User B account. Find the file you want to upload and select a location in your User A account to store it.

Some apps may let you upload a file directly through the app. For example, some apps have a **Send** menu option that lets you select a file on your device and open it. You can then choose a location for the file and send it to Oracle Content so it's stored in the cloud.

How do I view files?

1. Tap the file name.
2. When viewing a multi-page file, tap anywhere on the screen to see thumbnails of the pages in the file. Tap any thumbnail to view that page. The current page number and the total number of pages is displayed at the top of the screen (for example, 1/33). Tap that designation to jump to a specific page.
3. Press the side arrows to view the previous or next file in the folder.

If you want to use another app to view a file, tap and then tap **Open With**. Select the app to use. The listed apps are those installed on your device that can be used to open the file.

How do I view details about files and folders?

You may need to find out when a file was created or who created it. Or maybe you want to see when a folder was last updated and who updated it. Use the Properties page to see information about an item. Tap ⋮ and then tap **View Properties** in your list of files. You can also tap ⓘ when viewing a file.

To see details for a folder, tap ⋮ and then tap **View Properties** for the folder.

Seeing version history

To see the version history of a file while viewing the file, tap ⓘ and then tap **Version History**. You can delete versions or email versions of the file, or make an older file the current version. Tap ⋮ on the version you want to use to select those options.

How do I manage notifications?

You can customize what kinds of notifications you'll receive when using the app on your device.

1. Tap ⚙ to access your settings.
2. Tap the account name that you want to customize.
3. Tap **Push Notifications** and choose the option you need.

You can customize how your notifications appear on your device by going to the settings for your device and selecting Oracle Content from the list of apps. Then you can choose notification types for the app such as showing messages on the lock screen, in the notification area, and so on.

How do I edit Android files?

If you know you'll be offline soon (for example, if you're boarding a plane and using Airplane Mode), sync the file you want to use. Then you can work with it even if you're not connected to the Internet. See How do I sync my Android files with the cloud? It's also a good idea to reserve the file before you edit it. That way other people know the file is in use.

If you have the Microsoft Word app installed and you have a Microsoft Office 365 subscription, you can open a document directly from Oracle Content and edit that document in Word.

1. In Word, tap **Open**.
2. Tap **Browse**. A list of places is shown.
3. Choose the Oracle Content account you want to use from the list.
4. Find the file you want to edit.
5. After editing the file, tap **Save** to save the file back to its original location or tap **Save As** to save it to a new location, either in the same Oracle Content account or a different account or location.

You can also edit files using other apps on your device.

1. Find the file you want to edit. If you're online, you can find files through Browse, Favorites, or Search. When offline, you can choose files you've synced.

2. Tap ⋮ and then tap **Open With**.
3. Select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.
4. Edit the file as needed then tap **Save As** to save the file locally on your device.
5. When you're online, you can upload the local copy of the file back to Oracle Content from within the editing app if it has a **Send** option. Just tap **Send** and select Oracle Content as a location.

How do I search?

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Any results, if found, appear as you type your search terms.

For example, if you search for the word `report`, you'll find `Status Report 2013.xls` and `Report Logo.jpg`, as well as `Writing Instructions.doc` if the word `report` is in that document or conversation. You can filter your results by type (for example, by conversations or by files).

After your search results are listed, you can use the results like you would normally. You can add files to folders, add posts to conversations, upload files, or share folders with others.

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- You can search for multiple terms by separating the terms with a comma or a space.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.
- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
  - `not` or the dash (-). For example, `Report2013,Report2014 -sales` returns `Report2013` or `Report2014`, but not items with the keyword `sales` in them.
  - `or` or a comma. For example, `Report2013 or Report2014` returns the same results as `Report2013,Report2014`.

  - `and` or a space. For example, `Report2013 and Report2014` returns the same results as `Report2013 Report2014`.

  The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2013 and Report2014 not Report2014` returns nothing because `not` is evaluated first.

- To look for a phrase, use double quotes around the phrase. For example, `"United States"` returns files with the exact phrase `United States` in the file.
- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.
- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.
- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

How do I sync my Android files with the cloud?

Files that you synchronize with Oracle Content are available even if you aren't connected to the Internet.

For example, maybe you're going on a business trip and you want to view or edit the file while offline. By synchronizing the file, you're assured that you can access the file regardless of your connectivity. You control how and when the local copy is kept up to date to ensure you have the latest version.

If you are using an Android version older than 4.3, you first must set a passcode for your device. This protects your downloaded files.

1. Find the file you want to synchronize.
2. Tap and then **View Properties**.
3. Tap **Sync**.

To see a list of all synced files, tap the menu under the home page header and tap **Offline**.

To immediately synchronize your selected files:

1. Tap **Offline** in the filter menu under the header.
2. Tap .

The files in the Offline area are updated to match the latest versions in the cloud. You can also tap on the Offline screen then choose to unsync all files listed. Or you can tap for an individual file and choose **Unsync** from the menu.

You can have your files synchronized automatically:

1. Tap .

2. Tap the account name with the files you want to keep synchronized, then tap **Synchronization Settings**.
3. Choose how to auto-synchronize and how often.

How do I send a direct message?

To send a message to someone, just tap the avatar of any person wherever it appears. Add a post and a private conversation is started with that person.

To add content to a conversation, tap + to add a post, upload a file from your device, add a photo, or add a file that's already in Oracle Content.

How do I share files and folders?

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Sharing Your Content and Sites with Others for more details.

How can I use conversations to collaborate with others?

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Using Conversations to Collaborate.

9 Using the iPhone/iPad Mobile App

You can access your cloud files from anywhere while you’re on the go. Just use the mobile app on your iPad or iPhone to stay in touch wherever you are.

The Basics

- How do I sign in and out?
- How do I use multiple accounts?
- How do I set a passcode?
- How do I manage my notifications?

Managing Content

- How do I manage files and folders?
- How do I manage digital assets?
- How do I upload or download a file?
- How do I view files or media or see file and folder details?
- How do I edit files on my iPhone or iPad?
- How do I search?

Collaborating with Others

- How do I send a direct message?
- How do I share files and folders?
- How can I use conversations to collaborate with others?

How do I sign in and out?

1. Tap the app icon on your device to open it.
2. Enter the URL of the host server.
3. Enter your account information at the prompts.
4. Tap **Sign in**.

If you don't have an account or can't remember your user name, password, or the server URL, talk to the service administrator in charge of managing your cloud accounts.

You're kept signed in on your device until you sign out. If you don’t use the app for a week, you’ll need to sign in again.

To sign out, tap then tap **Sign Out**.

How do I set a passcode?

Passcodes are four-digit numbers you set to lock the app when you're not using it.

If you leave your device unattended and don't return within a specified time, you must enter the passcode. This helps to prevent access to the app if your device is left active where others could use it.

1. Tap to access your settings.
2. In the Security section, tap **Passcode Lock** and then **Turn Passcode On**.
3. Enter the four digits to use as a passcode, then re-enter the digits to confirm.
4. Tap **Require Passcode** and choose the amount of time that has to pass before you need to enter the passcode.

   For example, if you choose `After 1 minute`, then you leave the app and return after more than one minute, you have to enter the passcode to use the app again.

If you have Touch ID or Face ID enabled on your device, you can use it to unlock access to the app. Enable the appropriate options in the Passcode Lock screen after setting the passcode.

To disable the passcode, follow the same steps but tap **Turn Passcode Off** to switch the passcode off.

To change a passcode, follow the same steps, but choose **Change Passcode**.

How do I use multiple accounts?

You can use files from multiple Oracle Content accounts and you can easily switch between accounts while using your app. To add an account:

1. Tap to access your settings.
2. Tap **Add New Account**.
3. Enter a name for the account. Tap **Next**.
4. Enter your user name and password and then tap **Next**.
5. Tap **Connect**. You’re now connected to the new account.

You can add a maximum of 5 accounts. To switch between accounts, tap the account names at the bottom of the navigation panel. Tap on an account name from the ones that are shown to switch accounts.

How do I manage files and folders?

Many of the actions you need to perform, like copying or moving files and folders, can be done when viewing your file listing or when viewing the properties of a file or a folder. Tap and you’ll see the actions you can perform.

When looking at your file listing:

- **Go to Conversation**: used to start a conversation about a file or folder.

- **View Properties**: used to open the folder or file property page.
- **Share Link**: used to create a link to the file or folder.
- **Members**: used to add members to the folder.
- **Edit Tags**: used to add a keyword or tag for an item, making it easy to find when you search.
- **Open In**: used to open a file using an app on your device.
- **Send**: lets you send a copy of a file using an app on your device.

When looking at file or folder properties, you can also do the following actions:

- **Rename**: used to rename a file or folder.
- **Reserve/Clear Reservation**: used to manage file reservations.
- **Delete**: lets you delete a file or folder.
- **Copy**: used to copy a file or folder to a new location.
- **Move**: used to move a file or folder to a new location.
- **Go to Conversation**: used to start a conversation about a file or folder.

To manage multiple files, long-press on a file name and select the files you want to manage. Use the options at the bottom of the screen to move, copy, delete or mark as favorites.

To mark an item as a favorite, tap ☆. To see a list of your favorites, tap the dropdown menu next to the header on the home page and select **Favorites**.

To create a folder:

1. Go to the location where you want the folder.
2. Tap +.
3. Tap **Create Folder**.
4. Enter a folder name and optional description. You can't use symbols such as / \ ? or * in the name. Tap **OK** when done.

If you're a member of a shared folder, you may not be able to create a subfolder in the shared folder. You also may not be able to delete or rename a file or folder. It depends on the role you were assigned when you were added to the folder. If you can't perform an action, the action isn't available.

Tips

Deleting items

- If you want to delete a shared folder or a file in a shared folder, you may not be able to do it if your role doesn't allow it. For example, if you have a Downloader role in a folder, you can't delete files.
- Deleted items are moved to the Trash folder. You can permanently delete or restore the item from there. Items stay in the Trash until one of these events happen:
  - You permanently delete them.
  - Your Trash quota is reached.

  – The Trash is automatically cleared out, according to the interval set by your service administrator, the person in charge of managing the service for your organization.
  – You restore the item from the Trash.

Copying items

If you copy a file to the original location, it's saved with a number after the file name indicating it's a copy. For example, if you already had a file named *Status Report.doc*, a new copy of it is named *Status Report(2).doc.*

Reserving files

- To reserve a file, long press on the file name then select the file. Tap the reserved icon at the bottom of the screen.
- Other people can clear your reservation if they need to use the file. If they do, you get an email telling you who cleared it and when.
- If someone tries to upload a new version of a file you reserved, they can clear the reservation and upload the new version. You'll be notified by email if that happens.

How do I manage digital assets?

Digital assets are those items you want to group together for use on a website or for other projects.

Digital asset management is a way for you to upload and process the items you may need for a project, whether it's a new website, a microsite, or some other campaign. You can use your mobile device to upload, review, and approve or reject digital assets, including ones that are shared with you.

Your assets—files, videos, or content items—can be uploaded to your Assets folder or directly into the asset view.

- Open your Digital Assets folder on your home page and tap +. Add a file just like you'd add any other file to any other folder.
- Tap **Assets** in the navigation panel to open the asset view. Tap +, select your items and add them the same way you'd add them to any other folder.

Digital assets can be managed in collections, which are created and customized in a web browser. Collections have policies that dictate when the assets in the collection can be used. You can add assets to collections by opening the asset view. Select the assets for one collection, then tap **Add To** at the bottom of the screen. Select a collection from the collection menu at the top of the screen.

For example, a collection may have rules that restrict assets from use unless they've been approved by management. These collection policies apply to every asset in that collection. If someone shares a collection with you, you'll see the digital assets from that collection in your asset view when you tap **Assets**.

Assets can be routed for approval if a collection has approval policies in place. To see the approval status for an item, tap **Assets**. Tap the collection menu at the top of the screen and choose any collection listed there. Tap to show or hide the status. You can tap to see the options available to change the asset's status.

See Working with Digital Assets to find out more about managing digital assets.

How do I upload or download a file?

Uploading files

1. Go to the location, either a folder or a conversation, where you want the file or photo.
2. Tap .
3. Tap **Upload Media or Files**.
4. Choose what you want to upload:
   - Tap to upload a photo or take a new photo and upload it.
   - Tap to record a voice message and upload it.
   - Tap to select a file from another location, such as Google Drive or from another Oracle Content account.
5. Select the item you want to upload. You can upload a maximum of 25 items at one time.
6. Edit the name of the item if needed, and enter an optional description.
7. Enter optional tags for the item. A tag is like a keyword, which helps you categorize files. See How do I tag content? for more details about tagging. If you upload multiple items, the same tags will be applied to all the files.
8. Tap **Add** or **Post** when done.

You can add photos from your photo gallery to Oracle Content. Open your gallery and select the photos you want to add. Tap and choose Oracle Content as your location. Find the account and folder you want to use and tap **Select** and then tap **Upload**. You can also add tags to the items if you plan to use it as a digital asset.

If you're a member of a shared folder, you may not be able to add files to the shared folder. It depends on the role you were assigned when you were added to the folder. If you can't perform an action, the action isn't available.

You can upload files from one account to another. For example, perhaps you have two Oracle Content accounts, User A and User B. If you sign in as User A, select the **Upload File** option. Select Oracle Content as the location you want to choose from and select your User B account. Find the file you want to upload and select a location in your User A account to store it.

Downloading files

1. Find the file and open it to view it.

2. Tap . Choose **Save for Offline**.
3. When prompted, choose to download the file.

Downloaded files are encrypted and stored in the Offline area on your device. To see a list of downloaded files, open the dropdown menu next to the header on the home page. Tap **Offline**.

After a file is in your Offline area, you'll be able to use it even if you're not connected to the cloud. If you're traveling, for example, and have to set your device to Airplane Mode, you can still view or edit a file that's stored in the Offline area.

How do I search?

You can search through your conversations and files by tapping **Search** in the navigation panel. You can search for a word in a file or folder name or a word included in a file or conversation. You can also search for any hashtags used in conversations, or for conversation names or tags used in digital assets. Any results, if found, appear as you type your search terms.

For example, if you search for the word `report`, you'll find `Status Report 2013.xls` and `Report Logo.jpg`, as well as `Writing Instructions.doc` if the word `report` is in that document or conversation. You can filter your results by type (for example, by conversations or by files).

After your search results are listed, you can use the results like you would normally. You can add files to folders, add posts to conversations, upload files, or share folders with others.

Search tips

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- You can search for multiple terms by separating the terms with a comma or a space.
- You can filter your search results by clicking or tapping the Results menu. For example, you can view only conversations that match the search criteria, or only the people who match it.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.
- Searching is case-insensitive. This means that `report` will find the same results as `Report`.
- You can use the following search operators. The operators are case-insensitive, so `NOT` is the same as `not`:
  - `not` or the dash (-). For example, `Report2013,Report2014 -sales` returns `Report2013` or `Report2014`, but not items with the keyword `sales` in them.

  - `or` or a comma. For example, `Report2013 or Report2014` returns the same results as `Report2013,Report2014`.
  - `and` or a space. For example, `Report2013 and Report2014` returns the same results as `Report2013 Report2014`.

  The `not` operator has higher precedence than the others, with `and` having lowest precedence. For example, a search of `Report2013 and Report2014 not Report2014` returns nothing because `not` is evaluated first.

- To look for a phrase, use double quotes around the phrase. For example, `"United States"` returns files with the exact phrase `United States` in the file.
- Use parentheses to group complex queries. For example, you can search for `States and (not "United States")`.
- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.
- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

How do I manage my notifications?

You can customize what kinds of notifications you'll receive when using the app on your device.

1. Tap to access your settings.
2. Tap the account name that you want to customize.
3. Tap **Push Notifications**. You can elect to turn off all notification or choose specific ones you'd like to receive. For example, you may want to only be notified when someone assigns a Please Reply flag to you or when someone adds you to a conversation.

You can customize how your notifications appear on your device by going to the settings for your device and selecting Content from the list of apps. Then you can choose notification types for the app such as showing messages on the lock screen, in the notification area, and so on.

How do I edit files on my iPhone or iPad?

If you know you'll be offline soon (for example, if you're boarding a plane and using Airplane Mode), download the file to edit. Then you can work with it even if you're not connected to the Internet. It's also a good idea to reserve the file before you edit it. That way other people know the file is in use.

If you have the Microsoft Word app installed and you have a Microsoft Office 365 subscription, you can open a document directly from Oracle Content and edit that document in Word.

You must enable Oracle Content as a valid location in iCloud before editing a file.

1. In Word, tap **Open** and then tap **More**.

2. Tap **Browse**.
3. In the Locations dialog, turn on Oracle Content.

To edit a file using Microsoft Word:

1. In Word, tap **Open**.
2. Tap **More**, then **Locations**.
3. Choose the Oracle Content account you want to use from the list.
4. Find the file you want to edit.
5. After editing the file, tap **Save** to save it back to its original location or **Save As** to choose another location in Oracle Content.

You can also edit files using other apps on your device.

1. View the file you want to edit or tap ••• for the file and then **View Properties**.
2. In the toolbar at the bottom, tap .
3. Tap **Open In...** and select the app on your device that you'll use to edit the file. The apps that are shown are those that can be used to edit a file of that type.
4. Edit the file as needed.
5. Depending on the app you chose for editing the file, you may need to use a menu choice in the app such as **Open In...**, **Send a Copy**, or another file sharing option such as an iCloud Location to send the file to Oracle Content. If you're offline, you can use one of those options after you're reconnected.
6. Navigate to the folder where you want to store the file. You can save it in its old location (and create a new version) or you can save it as a new file in a different location.
7. Tap **Upload** to copy the file to Oracle Content.

How do I view files or media or see file and folder details?

Tap a file or photo name to view the item. To view a video or listen to audio, tap the item name then use the controls to start, stop, or skip through the video. You can view video formats such as mp4, .m4v, .mov. The .mp3, .aac, .wav (for iPhone voice memos), and .mov audio formats are supported. Some .mov formats may not be viewable.

When viewing a multi-page file, thumbnails of the pages in the file are shown at the bottom of the screen. The current page number and the total number of pages is displayed (for example, 1 of 33). Tap that designation to jump to a specific page.

Viewing details

You may need to find out when a file was created or who created it. Or maybe you want to see when a folder was last updated and who updated it.

1. Find the file or folder.
2. Tap •••, then **View Properties**.

Tap the dropdown menu next to the Properties header to see the revision history for a file and the links created for the file. When viewing folder properties, tap the dropdown menu to access the Members screen and the Links screen.

When viewing an item's properties, you can perform many common tasks, such as reserving a file, copying, moving, or renaming it, or viewing members who share the item. Tap ••• at the bottom of the Properties page to see the actions you can perform.

How do I send a direct message?

To send a message to someone, just tap the avatar of any person wherever it appears. Add a post and a private conversation is started with that person.

To add content to a conversation, tap + to add a post, upload a file from your device, add a photo, or add a file that's already in Oracle Content.

How can I use conversations to collaborate with others?

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time. You can start a conversation about a specific document or folder, or create an independent conversation. You can also create annotations, which are comments about specific sections of a file. For more details, see Using Conversations to Collaborate.

How do I share files and folders?

You can share individual files, or you can share an entire folder.

Files can only be shared by using a link to the file. You can email the link, or get a link to a file or folder and use it however you want to, like in an instant message or a document. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link.

You can also add members to a folder, giving those people access to all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

See Sharing Your Content and Sites with Others for more details.

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Sharing Your Content and Sites with Others

You can easily share your files and folders with others, and control who has access and what they can do with the content.

How do I get started with sharing?

You may need to collaborate with other people and share information, but you want to make sure only the right people have access to that information. The type of sharing you use depends on what you need to share:

- Files: You can create a link and email the link to someone or use it in an instant message or a document or another app. Sending a link is useful if you need to give access to people on an as-needed basis to specific files. The only way the recipient can access the file is by using the link.
- Folders: you can send a link to a folder or you can add people or groups as members to the folder. When you add members to a folder, those people and groups can access all the content in the folder. This is useful when you're working on a large project, for example, and people may need to continually access information.

You decide what people can do with your shared content. When adding members to folders, you determine their role in that folder. You may allow documents to only be viewed or you may decide people should be able to edit them and upload new versions. The following roles can be used:

- **Viewer**: Viewers can look at files and folders, but can't change things.

- **Downloader**: Downloaders can also download files and save them to their own computer.
- **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.
- **Manager**: Managers have all the privileges of the other roles and can add or remove other people as members.

There's also an Owner role with all the permissions to manage a folder, including deleting the folder.

Contributors and Managers can delete content and delete subfolders. If a shared item is deleted, it appears in the Trash folder of the person who owns the item and the person who deleted it.

When collaborating with partners and outside vendors, you can provide secure public links to files so everyone has the right level of access. You can also set access codes and expiration dates on links to add more security. You can also maintain oversight by monitoring who accessed which shared files and when.

Take a quick tour of sharing (English only).

What kind of links can I use for sharing?

When you share a file or folder with a link, you limit what other content the recipient will see when they use that link. You can email a link to a file or folder, or use a link in an instant message or a document or in another app. Sending a link is useful if you need to give access to people on an as-needed basis. The only way the recipient can access the file or folder is by using the link. You can't share a link with a group but you can share links with individuals.

You can use two kinds of links: public links or member links.

Public Links

This kind of link lets a person use the files in a folder but limits access to any other folders. If you send a public link to a file, the person can access only that one file. Your service administrator can allow or prevent the use of public links for your service and set who can receive those links (anyone or only registered users).

When you create a public link, you add a name to the link so you can track if it was used. You can also add a message with the link and choose permissions for the link. This determines what the recipient can do with the ink. You can adjust the maximum role used for public links in your preferences, accessed through your web browser. Your service administrator may also limit the roles allowed for public links.

- **Viewer**: Viewers can look at files and folders, but can't change things.
- **Downloader**: Downloaders can also download files and save them to their own computer.
- **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

When creating a public link, you can choose whether to send the link to **Anyone**, which means you can send it to people who don't have an Oracle Content and Experience Cloud account. Or you can limit the recipients to **All Registered Users**, those people who have an account.

You also can set an optional expiration date when the public link will stop working and an access code. Access codes are like passwords for a public link. You can set an access code and the person who gets the link will need to enter the code before the link can be used. This helps you add an additional measure of security on any public link you send. You'll need to send the access code to the person receiving the link so they can use the link. Otherwise, they will be unable to access the content associated with the link.

Member Links

This kind of link requires a person to be a member of the folder and requires the person to sign in to an Oracle Content and Experience Cloud account in order to use the link. When you use a member link, you can choose **Online Access**, which lets the recipient view the file or folder. You can also use a **Direct Download** link when sharing a file. This lets the recipient download a file without viewing it.

How do I share files?

You can share a link to a file, which lets people access only that file and not other files in a folder. And depending on the app you use, you may be able to send a file directly to someone else. For example, when using a mobile device, there's an option to send a file to someone.

Creating links

- Browser: select the file and click or **Share Link** on the menu bar. Choose the type of link (member or public). When creating a public link, you can use the defaults or select **Edit Link Options** to set an access code, expiration date, and so on. You can copy the link and use it elsewhere or enter an email address to send the link directly to someone with an optional note about the link.
- Desktop app: select the file in your Oracle Content folder and right-click. You can use the **Copy Link** option in the Oracle Content context section to quickly create a default public link and have it copied to your clipboard for use where you need it. Or you can choose **Share Link** . A dialog opens where you can elect to create a Member link or a Public link or open your email program to send the link in an email message. When creating a public link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy the link you create and use it elsewhere.
- Mobile device: Tap (Android) or (iOS). Tap **Share Link**. Tap **Pick Existing Link** to see available links and Member links. When using a member link, you can choose an app to use to download the file or copy the link for use in another app. To create a new public link, enter the necessary details. When done, click **Create** and select the app to use to share the link.

See What kind of links can I use for sharing? for details about Member and Public links.

How do I share folders?

You can share a folder by sending a link to the folder or by adding members to the folder. Links work the same way for folders as they do for files. When you add a group or a person as a member, they have access to all the content in a folder.

Creating folder links

You cannot share a link to a folder with a group. You can only share folder links with individuals.

- Browser: select the folder and click or **Share Link** on the menu bar. Choose the type of link (member or public). When creating a public link, new options appear for you to set an access code, expiration date, and so on. When creating a member link, you can copy the link and use it elsewhere or enter an email address to send the link directly to someone.
- Desktop app: select the folder in your Oracle Content folder and right-click. You can use the **Copy Link** option from the Oracle Content context section to quickly create a default public link and have it copied to your clipboard for use where you need it. Or you can choose **Share Link**. A dialog opens where you can elect to create a Member link or a Public link or open your email program to send the link in an email message. When creating a public link, you can use the defaults or click **Edit Link Options** to set an access code, expiration date, and so on. You can also copy any link you create and use it elsewhere.
- Mobile device: Tap (Android) or (iOS). Tap **Share Link**. Tap **Pick Existing Link** to see available links and Member links. To create a new link, enter the necessary details. When done, click **Create** and select the app to use to share the link.

Choose the kind of link you want to use.

Adding folder members

- Browser: select the folder and click **Members** on the menu bar. Click **Add Members**.
- Desktop app: select the folder in your Oracle Content folder, right-click, and choose **Members** from the Oracle Content context section.
- Mobile device: tap (Android) or (iOS). Tap **Members**. Tap .

Enter the people or groups you want to add and an optional message. Then select the role the members will have in the folder. If you add a group, all group members will have the same role.

How do I share collections, content items, or digital assets?

You can add other people as members to a collection or a subfolder in your Digital Assets folder.

Digital assets, content items, and collections are all part of structured content management, which is available to enterprise users. You can share all of these types of content by adding people as members to the collection or to a folder containing the assets.

If items are shared with you, they'll appear in your digital asset view or your collections. They will not show in your Digital Assets folder. Only those assets that you added directly to your Digital Assets folder or your asset view appear in that folder.

For example, if a collection was shared with you, those assets appear in your asset view. If someone shared a subfolder in their Digital Assets folder, that subfolder appears as a shared folder on your home page, not in your Digital Assets folder and the assets in that folder appear in your asset view.

You can only share collections and content items in your browser. You can't share them on a mobile device.

See How do I get started with sharing? for details about sharing roles and How do I share folders?.

How do I share a website or components?

You can share websites and the components that make up a website.

Site Sharing

With *site sharing*, you specify individual users who can access your unpublished (offline) site and allow them to view, modify, or manage the site based on the permission you give them. You can share a site if you're the site owner or if the site was shared with you and you were given the Manager role.

> **Note:**
>
> Any sharing role you assign to a user augments their security role. For example, if a user has the **Oracle Content and Experience Cloud Visitors** role, but you share the site and give them a contributor role, they can modify the offline site while others with the **Oracle Content and Experience Cloud Visitors** role can only view the online site.

- **Viewer**: Viewers can view the site in the editor, but can't change anything.
- **Downloader**: For a site, this has the same privileges as the viewer role.
- **Contributor**: Same as viewer, and can also edit the site, delete site pages, and delete the site if it's offline.
- **Manager**: Same as contributor, and can also add users and assign their roles, publish changes to an online site, and switch the site online and offline. The creator of a site (the owner) is automatically assigned the manager role.

Component Sharing

Some components provide access to shared resources such as folders, files, or conversations. *Component sharing* considers both site security (who can view the published site) and resource sharing (who can view and work with folders, files, and conversations).

For example, when you add a document manager component to your site, all visitors to the site can see the content of the folder, and based on their role and any other permissions, they may be able to add, modify, or delete what's in the folder.

General considerations:

- A site author can’t grant access to a folder that’s greater than the access they themselves have. For example, if the author has downloader access to a folder, they can’t give contributor rights to site visitors.
- The privileges set in the component can augment the visitor’s privileges. For example, if the visitor has viewer privileges (or no privileges) for a folder, the documents manager component can grant greater privileges based on the role selected in the component. These enhanced privileges are valid only in the component itself.
- If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.
- Privileges granted on a folder apply to the folders and files nested in that folder.

For public sites:

- Conversation components are supported on secure sites only.
- Documents manager components give all visitors downloader privileges for the associated folder by default. You can change the role within the guidelines listed above, and you can restrict the options presented to the user with settings on the component itself.
- Folder list and file list components grant all users downloader access. Users can view and download files regardless of their role.

How do I stop sharing or leave a shared folder?

To remove yourself or one person from a folder, go to the Members menu for the folder.

- In your browser, select the folder and click **Members** on the menu bar.
- When using the desktop app, go to your Oracle Content folder. Right click on the folder you want to use and choose **Members** .
- On your iPad or iPhone, tap . Tap **Members**.
- On your Android device, tap . Tap **Members**

Select a name and select **Remove** from the list next to your name or the person's name. If you remove yourself and want to access the folder again, you’ll need to ask the folder owner to add you to the folder again.

To stop sharing an entire folder:

- Remove all individuals from the folder or
- Move the *contents* of the folder to a new folder. If you move the folder to a new location, the membership information is moved with the folder.

How do I adjust link settings for one folder?

You can choose to prohibit public links for an individual folder if you need to. You can also change the role that’s automatically assigned to people when public links are created.

For example, maybe you chose the default role of Viewer for most of your folders, but for one folder, you'd like a default role of Downloader. This helps you customize link behavior for specific folders.

To set the link behavior, access the Properties for the folder in either the desktop app or your browser. Then click **Sharing** and adjust the values as needed.

How do I tell if a file was accessed using a link?

To check the access history of a file, choose **Properties** from the right-click menu or the menu bar. When viewing a file, click and then click **Properties**. Click **Access History** to see all activity for that file.

The list there shows you when the file was accessed, how the file was accessed (for example, by using a link) and by whom, and what was done, such as download or view. If a public link was used by someone who’s not a member of the folder, the link name is shown.

How do I recover a file deleted from a folder I shared?

People with the Manager or Contributor role in a folder you shared can delete files from your folder. If someone deletes a file, you'll find it in your Trash folder. You can select the file in the Trash and then click **Restore**.

Your service administrator (the person in charge of managing Oracle Content and Experience Cloud for your organization) can set how long items are retained in Trash. Your file may be permanently deleted if the Trash is automatically emptied.

Does sharing affect my quota?

If you share folders with other people and give them permission to add content to the folder, that content counts against your storage quota, too. For example, if your folder contains 500 MB of files and after sharing it, other users add another 300 MB of files, then the combined 800 MB counts towards your quota.

Your service administrator is in charge of managing Oracle Content and Experience Cloud for your organization. That person sets the amount of storage you can use. If you need more storage space than you currently have, contact your service administrator.

What are some sharing tips?

- If you share a folder, the sharing role applies to subfolders, too, unless you change those rights specifically.
- Your service administrator can allow or prevent the use of public links for your service and set who can receive those links (anyone or only registered users).
- When someone shares a folder with you, you're assigned a role. You may not be able to do some things, like uploading or deleting, because your role may not allow it. If you can't do something, then that menu option isn't available. For example, if you have a Viewer role in a folder, the **Download** option isn't available when using a web browser and the folder isn’t available for syncing when using the sync client.

To check your role, view the list of members in a folder. Your role is listed next to your name.

- You don't have to share a parent folder to share subfolders. For example, you can have a parent folder called *Current Projects*, and in that folder you can have subfolders called *Discount Program*, *Monthly Newsletter*, and so on. You can share *Discount Program* or *Monthly Newsletter* with people without sharing the *Current Projects* folder.
- The same person can have a different role for each subfolder in an unshared parent folder. For example, you can share *Discount Program* with Leo and assign him the Contributor role for that folder. You can share *Monthly Newsletter* with Leo and assign him the Viewer role for the files in that folder.
- If you share a parent folder that you own, then you can increase rights for the subfolders, but you can't decrease the rights. This means:
  - if the role assigned at the parent folder level is higher than the role assigned at the subfolder level, then the highest role is used for all subfolders.
  - if the role assigned at the parent level is lower than the one assigned at the subfolder, then the subfolder role doesn't change.

11 Using Conversations to Collaborate

You can create conversations to discuss folders and individual files, letting you quickly collaborate with others.

- Take a quick tour about conversations (English only)
- What can I do with conversations?
- How do I filter or sort my conversation list?
- How do I start a conversation?
- How do I add or remove people in a conversation?
- How do I manage my conversations?
- What can I do with flags?
- How do I add or remove files in a conversation?
- How do I add annotations?
- How do I add links to another conversation from a post?
- How do I mute, close, or discard a conversation?

What can I do with conversations?

Conversations are a way for you to collaborate with other people by posting comments and discussing topics in real time.

If you want to discuss a specific document or folder, you can start a conversation about that item. You can also start a conversation about an asset that's being managed in a collection or in your Digital Assets folder. Collections and digital assets are available for enterprise users; standard users don't see those navigation options.

When a conversation is started for a file or folder, members of the folder can post comments that are visible to all the members of the folder. This means an entire team can view and comment about a folder or files. Anyone who is a member of a folder can view a conversation or add posts to the conversation.

If the conversation relates to an asset managed in a collection, anyone who's a member of the collection can share in the conversation. It doesn't matter what role a person has as a member of the folder. If a person can view the contents, the person can view the associated conversation.

To give new access to someone to that conversation, you need to add the person as a member of the folder or collection. If you remove someone as a member, they'll also lose access to that conversation.

You can also start an independent conversation about any topic you want. When using your web browser or mobile device, you can start a conversation and add members to it. They can post comments in the conversation and reply to comments from other members. They can also add documents to share with other people in the conversation.

You can also create private conversations or “direct messages.” This type of conversation is between you and one other person and no other people can view the contents of the conversation.

You can use hashtags (#) to add keywords to your conversations. A hashtag in a message designates a meaningful term or topic so it’s easy to group all content associated with that term or topic. You can reply to, edit, delete, and restore any comments you make. You can “like” any post or mark posts as un-read or read and you can flag comments to catch someone’s attention.

When a conversation is started about a file or folder, appears with the item, showing you that a conversation is active for that file or folder.

Take a quick tour about conversations (English only).

How do I filter or sort my conversation list?

In your web browser

Click . To filter your conversations, choose what you want to see from the dropdown list at the top. For example, you may only want to see muted conversations, or those conversations that are closed.

To sort your list, choose an option from the menu in the top right corner of the screen. You can sort the list based on update time, name, or by those conversations with unread messages.

On a Mobile Device

Tap in the navigation panel. To filter your conversations, choose what you want to see from the dropdown list at the top. For example, you may only want to see muted conversations, or those that are marked as favorites.

To sort your list, tap the Sort icon in the top corner of the screen and select the sorting option you’d like to us.

How do I start a conversation?

In your web browser

You can start a conversation that’s associated with a digital asset, file, or folder, or you can start an independent conversation.

To start a conversation about an asset, a file, or a folder:

1. Open the item you want to use.
2. Click .
3. Start the conversation by posting a message in the conversation pane.

To start a private conversation with someone, click on the person’s avatar in a conversation. Click **One-on-One** to start a conversation with that person.

To add a post to a conversation, type your comment in the conversation pane and click **Post**.

You can start annotating a file immediately, without starting a conversation about it. When you add an annotation, a conversation is automatically started for that file. Just click and enter your comment to start the conversation.

To start an independent conversation to collaborate with others:

1. Click from the navigation sidebar.
2. Click **Create** and enter the conversation name.

On an Android device

To start a conversation about a file or folder:

1. Find the file or folder you want to use for a conversation.
2. Tap .
3. Tap **Go to Conversation**. A conversation is started for you.
4. To add members to the conversation, you need to add members to the folder or the folder where the file is stored. Open the conversation and tap and then tap **Members**. Tap **View Folder Members** and add people to the folder as needed.

To start a conversation that's independent of any file or folder:

1. Tap **Conversations** in the navigation panel.
2. Tap .
3. Add the conversation name.
4. Tap **OK**.
5. To add members to the conversation, open the conversation and tap and tap **Members**. Tap to select people to add to the conversation.

If the conversation was started about a folder, you'll need to add people as members to the folder. You can't add them through the conversation.

To start a private conversation, just tap the avatar of any person either in a conversation or from your People page. Add a post and a private conversation is started with that person.

To add content to a conversation, tap to add a post, upload a file from your device, add a photo, or add a file that's already in Oracle Content.

On an iPhone or iPad

To create a conversation about a specific file or folder:

1. Find the file or folder you want to use for a conversation.
2. Tap .

3. Tap **Go to Conversation**. A conversation is started for you.

To create a conversation that's independent of a file or folder:

1. Tap **Conversations** in the navigation panel.
2. Tap .
3. Add the conversation name.
4. Tap **Create**.

To add members to conversations:

1. Open the conversation and tap .
2. Tap .
3. Start typing the name of the person to add. A list of names matching the letters you entered is shown. Select the people from the list, then tap **Add**.

If the conversation was started about a folder, you'll need to add people as members to the folder. You can't add them through the conversation.

To add a post to the conversation, open the conversation and tap . Add your message then tap **Post**.

Using the desktop app

In your Oracle Content desktop folder, right-click on the file or folder you want to use for a conversation. Choose **Oracle Content** and then **Conversation**. Enter a post to get the conversation started.

You can also start a conversation by clicking on the radial menu when using an Office file.

How do I add or remove people in a conversation?

To add people to a conversation about a file or folder, add the person as a member to the folder or the folder where the file is stored. After a person is added as a member, they'll be able to access the conversation.

When working with independent conversations (not one created about a document or folder), you can add people directly to the conversation. When you add someone to a conversation, they're given management rights to that conversation. This means they can add other members, rename the conversation, or even close the conversation.

You can see a person's activity status in the conversation where the person is a member. The colored circle around a person's picture indicates the person's status:

- A full green circle around the picture shows that the person is signed in and currently using their account.
- A three-quarter yellow circle around the picture shows that the person is signed in but not currently using their account.
- A half gray circle around the person's picture shows that the person is offline and not signed in.

When viewing status in your browser, an animated pencil icon in the lower right corner of a picture shows that the person is entering content in the current conversation.

Web Browser

To add people to an independent conversation in your web browser:

1. Open the conversation.
2. Click +.
3. In the Share dialog, click **Add Members**. Begin entering the name or email address of the people to add. Select names from the list then click **Add**.

A quick way to remove a person from a conversation (including yourself) is to click the person's picture in the membership bar, then select **Remove from Conversation**. You can also click + and click **Remove** under the name of the person you want to remove.

To remove someone from a conversation created in a file or folder, you need to remove them as a member from the folder where the file is stored. That revokes their access to both the file and its conversation.

iPhone/iPad

To add someone from within a conversation, tap . Tap . Enter a name or part of a name in the search bar. Select the person from the list and tap **Done**.

To remove someone from the conversation, tap ••• next to the person’s name. Tap **Remove Member**.

Android devices

Open the conversation and tap ⋮ and then tap **Members**. To add new members, tap . Enter a name or part of a name in the search bar. Select the person from the list and tap **Add**. To remove someone from the conversation, tap their avatar, then tap **Remove from Conversation**.

How do I manage my conversations?

You can manage actions for your conversation from the conversation management menu. Just click or tap ☰ to access the menu where you’ll see the following options:

- **Mark All Read:** You can mark all the posts in the conversation as read. The “read” count appears in the conversation listing.
- **Favorite**: Add the conversation or remove it from your list of favorites.
- **Share**: Share the conversation by adding members to it or by sending a link to the conversation.
- **Upload Document**: Add a document to the conversation.
- **Rename**: Change the name of the conversation.

- **Mute** or **Unmute**: Muting a conversation hides it from your list of conversations and stops messages about it from appearing in your email digest if you chose to have one sent to you.
- **Close** or **Open**: Closing a conversation prevents people from adding new messages to it and removes it from people's list of conversations.
- **Show** or **Hide** membership messages: These types of messages show when a person was added to a conversation and who added them.
- **Change language**: You can adjust the language setting for individual conversations by choosing a language from the list.
- **Discard**: You can discard a conversation that was created independently of a file or folder. When you discard it, the conversation is removed from the listing of conversations for yourself and any members.

What can I do with flags?

Flags are a way to bring an item, like a message or a file, to someone's attention. Depending on the priority you assign, you can capture people's attention quickly.

To assign a flag, view the items in a conversation and click or tap the flag icon to the right of the item. Next, select the person to be flagged and the priority level. You can assign a different flag priority to each person.

Flag	Meaning
	For Your Information: look at this when you have time.
	Please Reply: look at this, and let me know what you think.
	Please Reply Urgent: look at this as soon as you can and let me know what you think. An email notification is always sent for Please Reply Urgent flags.

- Flags assigned to you are red. Flags assigned to others are blue.
- You can see your total flag count in the header, next to the search field. Click or tap the count icon to quickly see the flags assigned to you.
- On the Flag screen, click or tap the menus in the header bar to filter what you see.
- To clear a flag, go to the flagged message and click or tap the flag icon. Click **Clear** or tap the **X**. The person who set the flag may get an email, depending on what they've set up through their notifications.

To ensure flags **say look at this now!**, use them thoughtfully. A flood of flag notifications all at once or all the time reduces the impact.

How do I add or remove files in a conversation?

You can add files to an independent conversation as attachments to messages or as individual items without a message. There are no restrictions on the types of file you can add. File previews are limited to the first 100 pages and not all file types can show a preview.

In a web browser

1. Open the conversation where you want to add a file.
2. Click .
3. Select where the file is stored, either on your computer or already stored in Oracle Content and Experience Cloud. Navigate to the file, select it, then click **Post**.
4. You can add a message with the file, or just click **Post** to add the file by itself.

On your iPhone or iPad

1. Open the conversation on your iPhone or iPad.
2. Tap .
3. Tap **Choose from Folder** to add a file from your Oracle Content account. Tap **Upload Media or Files** to:
   - Choose a photo or video from items stored on your device.
   - Record a voice message to add to the conversation.
   - Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in Oracle Content.
4. Tap **Edit** to change the name or add an optional description.
5. Tap **Post**.

On your Android device

1. Open the conversation where you'll add the document.
2. Tap .
3. Choose what you'll add to the conversation.
   - Choose a photo or video from ones on your device.
   - Upload a file. Select the location where the file is stored (for example, Google Drive or another Oracle Content account). Choose the file then select the location where you want to store it in your account.
   - Choose a file already in Oracle Content. Navigate to the location where the file is stored and select the file.
4. Choose the location in Oracle Content where you want to store the item.
5. Tap and then tap **Edit** to change the name or add an optional description.
6. Tap **Done**.

How do I add annotations?

You can use annotations to add comments about a specific part of a file or asset when you view it in your web browser. For example, if a colleague uploads a presentation, you can scroll through the presentation and add a comment on page 2, page 7, and page 10, discussing aspects of the presentation. Or if someone adds a photo to a collection that's being used for one of your projects, you can create a conversation and add annotations about that photo before it's used. Collections and digital assets are available to enterprise users. Standard users won't see those options in their navigation panel.

Your annotation appears in the conversation pane as a post. If you add an annotation to the file named Upcoming Project Details.pptx, for example, your annotation appears in the conversation pane as a post with *via Upcoming Project Details.pptx* underneath the date and time of the annotation.

Anyone who is a member of the folder where the file is stored or a member of the collection where it's used can view the annotations on files. It doesn't matter what role a person has as a member of the folder. In order to add an annotation, a person must have a Downloader, Contributor, or Manager role.

When you add an annotation to an asset in a collection, that annotation only appears in the context of the collection. For example, suppose you have a photo of a bicycle in the *Cyclist* collection. The photo is actually stored in your Bicycle folder, but it's being used in the collection. If you add an annotation to the photo in the *Cyclist* collection, the annotation does not appear in your Bicycle folder.

1. View the file where you want to add a comment.
2. Click .
   - To highlight text and leave a comment about the highlighted area, hold down the right-button and drag your cursor to select an area. Release the button and add your comment in the Conversation pane.
   - To insert a comment at a spot in the file, go to the area where you want to add a comment. Click at the spot then add your comment in the Conversation pane.
3. Click **Post** to save your annotation.

After you add an annotation to a file, a conversation is started for the file so others can add comments, too.

How do I add links to another conversation from a post?

While writing a post to a conversation, you may find it handy to link to another conversation.

1. Open the conversation where you'll post your message. It can be an independent conversation or one created for a document or folder.
2. Enter your text in the message box. When using a browser, formatting options are available under the text box.
3. Click or tap .
4. Search for a conversation or choose one from the Recent list. A link to that conversation is added to the body of your message.
5. Click **Post** or press Enter, depending on how you set up your preferences.

How do I mute, close, or discard a conversation?

You can manage a conversation’s life cycle using the conversation’s menu.

Open the conversation. Click or tap ☰ to access the management menu.

Select **Mute** or **Unmute** to hide or show a conversation in your list of conversations. Muting a conversation stops messages about it from appearing in your email digest if you chose to have one sent to you.

Select **Close** to prevent people from adding new messages to it. Closing a conversation also removes it from people's list of conversations.

You can only **discard** a conversation that was created independently of a file or folder. When you discard a conversation, it’s removed from the listing of conversations.

12 Using Groups and Following People

You can set up groups of people, making it easy to share with several people at one time. You can also follow individuals, checking to see if someone is online or not or you can send direct messages to people to catch their attention.

Using Groups

- Take a quick tour about groups (English only)
- How do I use groups?
- How do I create or delete a group?
- How do I add people to a group?
- How do I join or leave a group?

Following People

- How do I start or stop following someone?
- How do I see who is online?
- How do I send a direct message to someone?
- How do I view a person's profile?

How do I use groups?

Groups can help you communicate and coordinate with several people at one time.

A group can be added to a conversation, so you can quickly start a collaboration with several people. Or you can add a group as a member to a folder, letting you quickly share the contents of that folder with others. Content types can also be shared with groups, the same way they're shared with individuals.

> **Note:**
>
> You can't share a public or member link with a group and you can't share a collection with a group.

You can create your own groups, or groups may have already been created for your organization by your service administrator.

Here are some tips to keep in mind when creating and using groups:

- **Don't duplicate groups**. Use the **Find Public Groups** option on the Group menu to see if a group already exists that might be useful for your purpose.
- **Use a meaningful name**. Don't use acronyms or abbreviations for your group name. Make it meaningful so people will understand its purpose.

- **Choose the right privacy control for your group**. You can control who can see or use the group, and you can control if someone can add themselves to a group. There are three kinds of groups:
  - **Public group**. A public group is visible to anyone and anyone can add themselves to the group. You should use this kind of group sparingly. For example, you may have a rollout of a project and you'd like to gather feedback from anyone who used the project. You can open up a group to everyone and let people add themselves so they can add feedback about that specific project.
  - **Private group**. A private group is one that can be seen by everyone but people can't add themselves to the group. This can be useful when you want to limit a group to a subset of people. People could discover the group exists and use the group to share information with those people. For example, you can create a group for the Engineering department. Anyone who needs to collaborate or share with that department can add that group as a member to a conversation or folder.
  - **Closed group**. This type of group gives you the tightest control on membership. No one will be able to see the group unless they're already a member and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming acquisition or project. No one else in the organization needs to know about this, so by creating a group for restricted members, you control who can see the information.
- You can add a group as a member to a conversation, content type, or folder. If you add someone to a group or remove someone from a group, they will be added or removed from the conversation, content type, or folder. If an individual was added as an individual but not as part of a group, they remain a member unless removed as an individual.
- If a group is deleted, access to any shared folder, content type or conversation is removed from the people in that group.
- You can use groups on your mobile device and with the desktop app, but you manage groups using the web browser interface.

To use a group, select it just like you'd select a person to share with. For example, when sharing a folder or conversation, type the name of a group in the Members dialog. Choose the permissions (View, Contributor, and so on) for the individuals in the group then add the group as a member to the folder or conversation.

Take a quick tour about groups (English only).

How do I create or delete a group?

Groups let you quickly share content and collaborate with several other people at one time.

> **Note:**
>
> You can use groups on your mobile device and with the desktop app (add them as members to folder and conversations and so on) but groups are managed using your web browser interface. You can't create, delete, join, or leave groups using a mobile device.

How do I create a group?

1. Click **People and Groups** in the navigation menu. Choose **Find Public Groups** from the menu at the top of the Group page. If you don't find a group you can use, select **Create Group**.
2. Create a meaningful name for the group. Don't use abbreviations or acronyms that might be confusing. Use a name that will tell people the purpose of your group.
3. Choose the privacy settings you want to use. You can make the group visible to everyone, you can have the group be private or you can make the group visible only to members.
   - **Public group**. A public group is visible to anyone and anyone can add themselves to the group. You should use this kind of group sparingly. For example, you may have a rollout of a project and you'd like to gather feedback from anyone who used the project. You can open up a group to everyone and let people add themselves so they can add feedback about that specific project.
   - **Private group**. A private group is one that can be seen by everyone but people can't add themselves to the group. This can be useful when you want to limit a group to a subset of people. People could discover the group exists and use the group to share information with those people. For example, you can create a group for the Engineering department. Anyone who needs to collaborate or share with that department can add that group as a member to a conversation or folder.
   - **Closed group**. This type of group gives you the tightest control on membership. No one will be able to see the group unless they're already a member and no one can add themselves to the group. For example, perhaps a small set of people need to discuss an upcoming acquisition or project. No one else in the organization needs to know about this, so by creating a group for restricted members, you control who can see the information.
4. Click **Done** when finished.
5. Add members as needed. Click **Add Members** and search for people to add. Select the role you want the person to have then click **Add**.

To edit your group's settings, click next to the group name. You'll see options to edit the group, add members, or delete the group.

How do I delete a group?

To delete a group, open the group and select the menu for the group ( ). Select **Delete**.

> **Note:**
>
> If you shared a folder, a content type, or a conversation with the group, the shared object is now unavailable to the group members. If you shared something with an individual who was also in a deleted group, that individual will still have access to the object.

How do I add people to a group?

If you own a group or if you have a manager role in a group, you can add people as members to the group.

> **Note:**
>
> You can use groups on your mobile device (add them as members to folder and conversations and so on) but groups are managed using your web browser interface. You can't add people to groups using a mobile device.

To add someone to a group, click **People and Groups** in the navigation menu. Open the group or click for the group. Click **Add Members**.

You can add individuals or you can add other groups. If you add a group and a person is in that group, you won't be able to add the person as an individual.

When you add an individual as a member of a group, you assign permissions to them, either as a manager or a member of the group. If you add a group as a member, the permission you assign to the group applies to everyone in that group.

How do I join or leave a group?

You can join public groups if the membership is open or you may be added to other groups by the group manager.

> **Note:**
>
> You can use groups on your mobile device and with the desktop app (add them as members to folder and conversations and so on) but groups are managed using your web browser interface. You can't create, delete, join, or leave groups using a mobile device.

How do I join a group?

To join a group, click **People and Groups** in the navigation menu. Choose **Find Public Groups** from the menu at the top of the Group page. Choose the group you want to join and click . If the membership is open, you can select **Join Group**.

You may already be in a group without joining it. People can create groups and add you to them. The group name appears in your list of groups. If you're in a group and information was shared with the group (for example, if the group was added as a member to folder), that shared item appears in your list of conversations, folders, and content items.

How do I leave a group?

To leave a group, open the group and select the menu next to your name ( ). Select **Leave Group**. If a conversation, folder, or content item was shared with that group, you'll lose access to those things immediately.

How do I start or stop following someone?

When you follow someone, they're added to your People list, making it easy for you to see if they're online or active.

In your web browser or iPhone or iPad

To follow someone who's a member of a conversation, select the person's picture from the membership bar and then select **Follow**. You can also follow people by clicking on their picture anywhere else you see it, and go to the person's profile page. Select **Follow**.

To stop following people, choose **Unfollow** from the menu.

On an Android device

To follow someone in a conversation, open the conversation and then tap the Members/Messages menu at the top of the screen. Tap **Members**. Find the person to follow and tap . Tap **Follow**. You can also follow people by tapping on their picture anywhere else you see it, and go to the person's profile page. Select **Follow**.

To stop following people, choose **Unfollow** from the menu.

How do I see who is online?

You can see a person's activity status in the conversation where the person is a member. The colored circle around a person's picture indicates the person's status:

- A full green circle around the picture shows that the person is signed in and currently using their account.
- A three-quarter yellow circle around the picture shows that the person is signed in but not currently using their account.
- A half gray circle around the person's picture shows that the person is offline and not signed in.

When viewing status in your browser, an animated pencil icon in the lower right corner of a picture shows that the person is entering content in the current conversation.

If you chose to follow some people, the person's status is also shown under the user name on the People page, accessed by clicking or tapping in the navigation panel.

How do I send a direct message to someone?

You can send a message to someone by clicking that person's avatar in a conversation or on your People page. The profile page for the person is displayed.

Click **one-on-one** to send a message and start a private conversation with that person. On a mobile device, just tap the avatar of any person either in a conversation or from your People page. A private conversation is started with that person.

How do I view a person’s profile?

When you’re using conversations, you’ll see people’s pictures and/or names. To view a person’s profile, click or tap the person’s picture then select the person’s name, either in the membership bar of a conversation in your browser or from the People page.

You can follow a person, which lets you easily keep track of a person’s activity status (online or offline, for example). People you follow are listed on your People page. And when you view a person’s profile, you can start or resume a one-on-one conversation with them.

13
Working with Sites

With Oracle Content and Experience Cloud, you can easily create websites to share with customers, prospects, and your product team.

You can also share your sites so others can easily collaborate with you on the design and the content. There's no need to learn coding languages or commands. To change site content, just create and open an update in the editor. To create and manage the site itself, use the options in the site manager.

The Basics

- Quick tour of the Experience home page
- How do I get started with sites?
- What is the process—in a nutshell?

Managing Sites

- How do I manage sites?
- How do I create a site?
- How do I edit a site?
- How do I make a site online or offline?
- How do I change the site description, logo, or embed properties?
- Is my site secure?
- How do I change site security?

Using Templates

- What is a template?
- What kinds of templates are there?
- How do I create a template from a site?
- How do I change template details?
- How do I manage templates?
- How do I export a template?
- How do I import a template?

Working with Themes

- What is a theme?
- How do I manage themes?
- How do I publish a theme?

Managing Custom Components and Layouts

- What is a component?
- What is a custom component?
- What is a layout?
- What can I do with custom components and layouts?
- How do I register a remote component?
- How do I create a local component or layout?
- How do I export a component or layout?
- How do I import a component or layout?

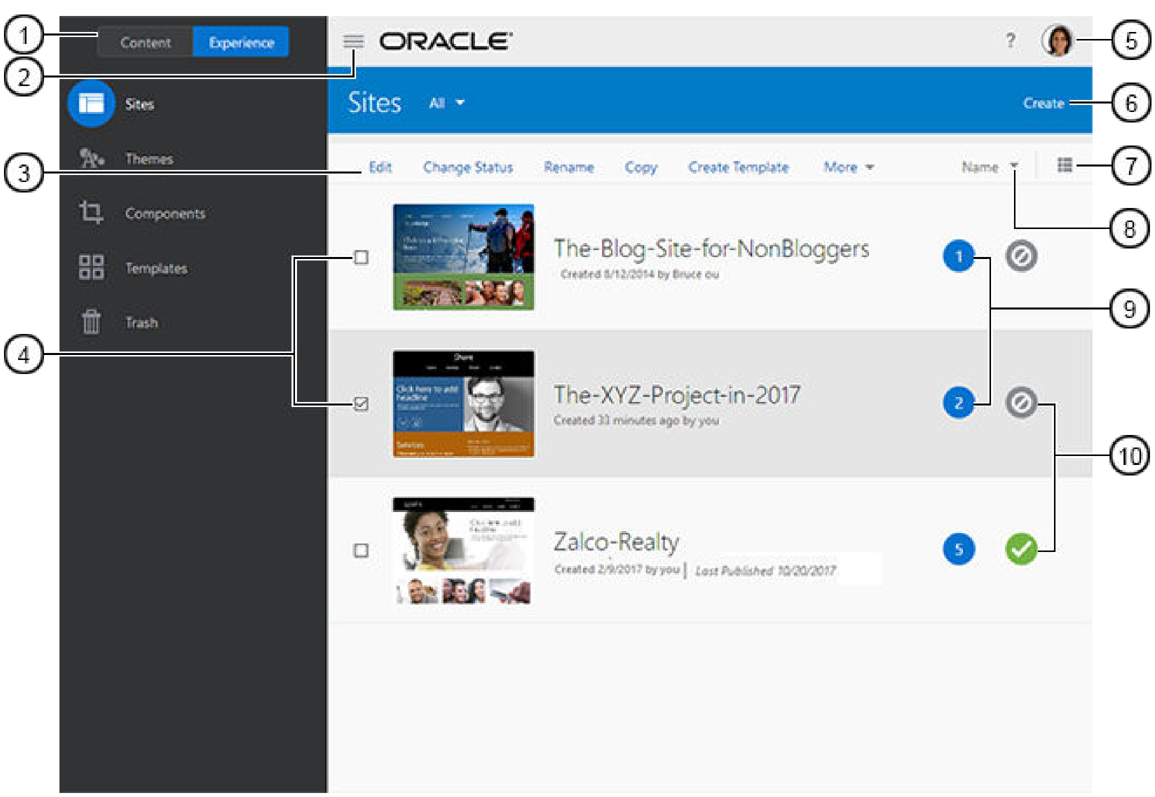
The Basics

Let's show you around and answer some of your questions about working with sites.

- Quick tour of the Experience home page
- How do I get started with sites?
- What is the process—in a nutshell?

Quick tour of the Experience home page

The Experience home page is your gateway to working with web sites.



- The **menu (1)** has options for managing sites, themes, components, and templates, for cleaning up your trash folder, and for accessing switching to content options.
- The **panel toggle (2)** switches the panel view between options for managing content and those for managing sites and other experiences.
- After you select a site in the list, the **menu bar (3)** is available. Use the options on the menu bar to edit your sites, rename sites, and perform other tasks.

  The options that are shown depend on your role for the selected site. For example, if you created the site, then you have the Manager role for that site and can perform all the tasks listed. But if someone has shared a site with you and assigned you the Viewer role, you can view site properties, but you can't change anything.

  The menu options also depend on the current status of the site. The **Rename** and **Delete** options are available only if the site is offline.

  Tip: Looking for a shortcut? Right-click a site to open the context menu and choose an option.
- The **sites list (4)** shows all the sites you own or that were shared with you. The list includes the site name, the number of updates, if the site is secure, and the status of the site (online or offline).
- The **user menu (5)** has options for setting your preferences, giving feedback, accessing help, and signing out. Click the user picture to display menu options.
- Click **Create (6)** to start the process of creating a website. Before you can create a site, your administrator must enable the **Create** option and provide one or more templates. If you don't see the **Create** option on the sites page or templates on the template page, contact your service administrator.
- Click the **view icon (7)** to alternate the format of the list between a list view and a grid view.
- Use the **sort options (8)** to change the display order for the sites.
- Click **Updates (9)** to edit an existing update for the site or to create a new update for the site.
- Click **Offline** or **Online (10)** to alternate the status of a site between offline and online.

  Tip: If a site is online, click the URL below the site name to view the site in your web browser.

How do I get started with sites?

When you create a site, you begin with a template, which has everything you need to get started.

Templates include the site framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components.

When you edit a site, you create a new update or use an existing update. Within an update, you can edit and add content, adjust the style settings, add and delete pages, change page layouts, and organize pages.

Not all steps are required each time you edit the site, but you'll get an idea of where and when you perform them. You can perform some steps only if your user role allows it. If you create the site, you have the manager role and can perform all the tasks listed. If someone shared a site with you and assigned you the viewer role, for example, you can view site pages, but you can't make changes.

The home page opens when you first access sites. The home page lists the sites that you created or that were shared with you. The editor opens when you select a site and choose **Edit**.

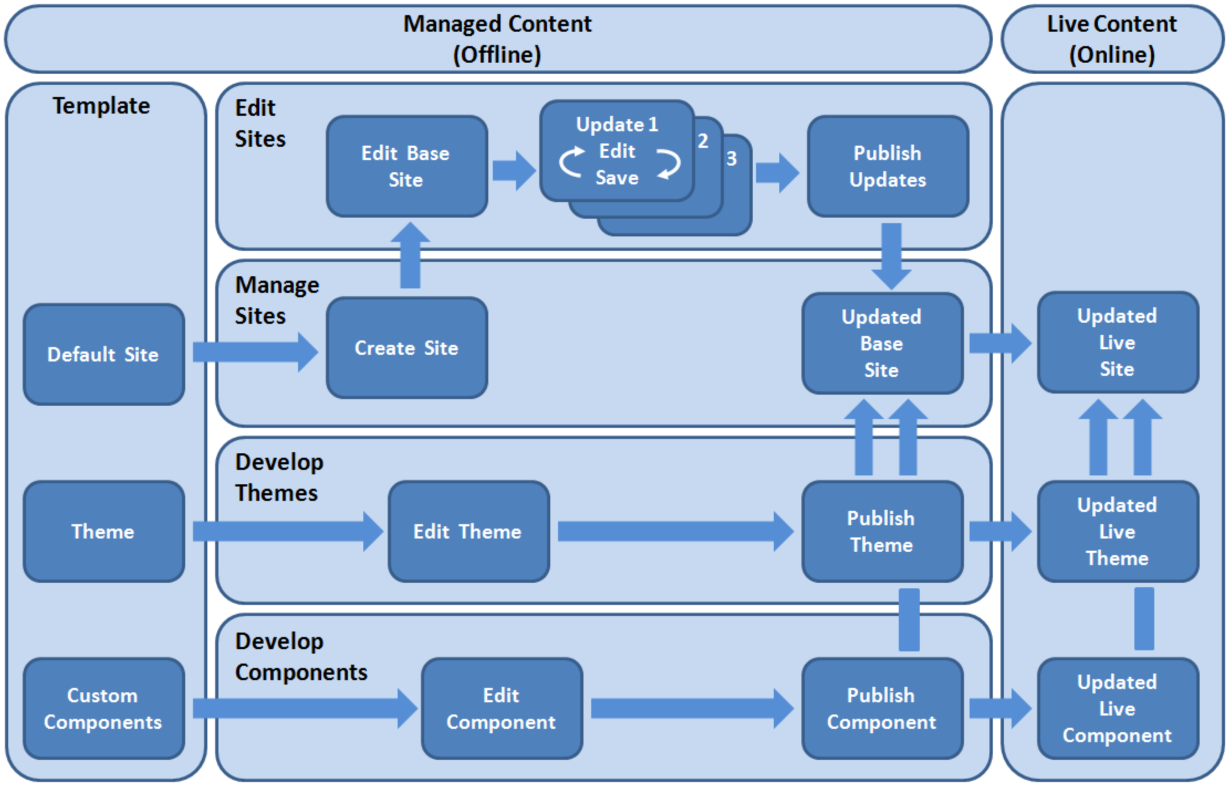
1. **Create a website:** Just select a template and name the site. The site remains offline until you're ready to publish it. See How do I create a site?

   The templates must be installed and shared by an administrator before you can use them. If you don't see any templates, contact your administrator.

2. **Create an update for the site**: An update is a named collection of changes to the current base site. Each time you view or edit a site in the editor, you use an update. See How do I use an update?
3. **Open the site in the editor**: Use the drag-and-drop editor to add pages and content to your site. See How do I edit a site?
4. **Add pages to the site**: Select a pre-defined layout to quickly define the type of page. See How do I add a page?
5. **Add components to a page**: Drag-and-drop text, images, documents, and more onto the page. See How do I add content to a page?
6. **Change the content or properties of a component**: Fine-tune the spacing, alignment, and other properties for components. See How do I work with styles and formatting?
7. **Optionally switch the layout used for a page**: Change the page design on the fly. See How do I change the page layout?
8. **Optionally switch the theme used for the site**: Quickly change the look and feel of the entire site. See How do I switch themes?
9. **Set search engine properties**: Help search engines find your site to increase traffic. See How do I set search engine properties?
10. **Apply a site update**: Update the site with the changes in an update. See How do I publish an update?
11. **Share the site with other team members**: Share the site with specified users and assign each of them a role to determine what they can do with the site. See How do I manage sites?
12. **Set site security**: Choose to make your published site available to anyone or to registered users only. See How do I change site security?
13. **Make the site online or offline**: Make the site publicly available or take it offline so only designated users can access it. See How do I make a site online or offline?

What is the process—in a nutshell?

Anyone can build a website with Oracle Content and Experience Cloud. You don't need to use any proprietary tools or code or software. The user interface is graphical, intuitive, and friendly. Let's look at the overall process to create and publish a website.



When you create a site, you begin with a template. A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components.

When you edit a site, you create a new update or use an existing update. Within an update, you can edit and add content, adjust the style settings, add and delete pages, change page layouts, and organize pages.

Updates don't need to be ready all at once. You and your team members can work on multiple updates concurrently and independently. For example, you might be working on an update with weekly news while another team member is adding pages for an upcoming sales conference. You can edit, review, and save changes to your updates as often as you need to and merge an update with the base site at any time.

When you're ready, launch your site. Just a single click publishes your site to the web. That's it in a nutshell—from concept to launch.

Managing Sites

To change site content, create and open an update in the editor. To create and manage the site itself, use the options in the site manager.

- How do I manage sites?
- How do I create a site?
- How do I edit a site?
- How do I make a site online or offline?

- How do I change the site description, logo, or embed properties?
- Is my site secure?
- How do I change site security?

How do I manage sites?

Site management includes creating and editing the site as well managing as the content used in the site. You use the *site editor* to create, copy, and delete site pages and page content. Use the *folder and file manager* to create, copy, share, and delete entire sites.

See Editing Sites for details about the site editor.

Use options on the menu bar or right-click menu on the Sites page to perform the following tasks.

Task	Description
Create a new site	When you create a site, you begin with a template. A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components. See How do I create a site?
Edit a site	When you edit a site, you can create a new update or use an existing update. You can edit sites that you own or that someone shared with you. See How do I edit a site? and How do I change the site description, logo, or embed properties?
Make a site online or offline	When a site is *online*, users can view it with a web browser at a designated address (URL). When a site is *offline*, the site isn't available for public viewing. You can view the site only in Oracle Content and Experience Cloud. See How do I make a site online or offline?
Copy a site	You can copy a site to get a head start in building a site. Everything from the original site, including the theme, all outstanding updates, the pages, the page content, and all other assets such as images, are copied to the new site under the new name you provide. Your new site is offline and ready for editing. Right-click the site you want to copy and choose **Copy**. Enter a name for the copied site that's different from any existing site name on the same server. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. Optionally, select **Include updates** to copy any outstanding updates from the original site to the copied site.

Task	Description
Share an offline site	If your administrator enabled sharing, you can share your site with other Oracle Content and Experience Cloud users and allow them to view, modify, or manage the site based on the permission you give them. Anyone who can access your service is considered a member. When you share a site, you assign a role that defines what the member can or can't do with your site. Members can only use your site according to the role you assign to them. Right-click the site you want to share, choose **Share**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can view the site in the editor, but can't change anything. • **Downloader**: For a site, the downloader role provides the same privileges as the viewer role. • **Contributor**: Same as viewer, and can also edit the site, delete site pages, and delete the site if it's offline. • **Manager**: Same as contributor, and can also add users and assign their roles, publish changes to an online site, and switch the site online and offline. The creator of a site (the owner) is automatically assigned the manager role.
Secure an online site	When you publish a site and make it available online, it's publicly available to anyone. However, if you're the site owner or have the manager role, you can restrict online sites to be available to registered users only. To change the status of a site, you must be the site owner or have the manager role. Right-click the site you want to secure, choose **Share**, and click the **Site Security** tab. Click **Yes** next to Login Required, and select users by role or by user name. See How do I change site security?
Rename a site	Right-click the site you want to rename and choose **Rename**. Enter a name for the site that's different from any existing site name on the same server. For naming guidelines, see How do I create a site?
Delete or restore a site	If you have the appropriate permissions, you can delete a site and its contents. When you delete a site, everything in the site folder, including all outstanding updates, site pages, page content, and assets such as images that you added to pages are put in the trash. You can delete or restore a site if you created the site (you're the site owner) or if someone shared a site with you and gave you the Contributor or Manager role. You can't delete a site if it's online. To take the site offline, you must be the site owner or have the manager role for the site. To delete a site, right-click the site you want to delete and choose **Delete**. You're prompted to move the site and all site updates to the trash. A deleted site stays in the trash until: • You restore the site. • You permanently delete the site. • Your trash quota is reached. • The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days. To restore a site, click **Trash**, then right-click the site from the list and choose **Restore**.

How do I create a site?

To create a site, select a template, name the site, and you can start adding content right away.

Before you can create a site, your administrator must enable the **Create** option and provide one or more templates. If you don't see the **Create** option on the sites page or templates on the templates page, contact your administrator.

To create a site:

1. On the home page, click ☰ and click the **Experience** tab to view options.
2. Click **Sites**.
3. Click **Create**.
4. In the Create Site dialog, select a template to use as the basis for your site. The list includes all the templates you created and any templates that others shared with you.
5. Enter a name for the site. The name is used in the site URL. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.

   Don't use the following names for templates, themes, components, sites, or site pages:

   - authsite
   - content
   - pages
   - scstemplate_*
   - _comps
   - _components
   - _compsdelivery
   - _idcservice
   - _sitescloud
   - _sitesclouddelivery
   - _themes
   - _themesdelivery

   Although you can use the following names for site pages, don't use them for templates, themes, components, or sites:

   - documents
   - sites
6. Enter an optional description for the site.
7. When you're ready, click **Create**. A progress bar shows the new site name and creation status. When the site is created, the name appears in the list of sites. Its initial status is offline.

To quickly find your newly created site in the list, sort the list by **Last Updated**. The site you just created is at the top of the list.

To open the site so you can work on it, select the site and click **Edit** in the menu bar.

After you create a site, you can share it with other users and allow them to view, edit, or manage the site. See Is my site secure?

If you are an enterprise user, when you create a site, a corresponding site collection is created. If you share the site with a user, the user has the same permissions on the associated collection. See Working with Content Items and Collections.

How do I edit a site?

Any time you edit a site, you create an *update* or use an existing update. An update is a set of changes to the site that you can continue to revise until you publish it, allowing you to experiment with different site features until you're sure you want to make the changes permanent.

To edit a site:

1. On the home page, right-click the site in the list and choose **Edit**.
2. If this is the first update for a site, enter a name for the update and an optional description, then click **Create**. You can use letters, numbers, underscores (_), and hyphens (-) in the name. If you enter a space, it's automatically replaced with a hyphen.

   If you already have updates to the site, select an update from the list and click .
3. The editor opens in preview mode. To make changes or to use the navigation options in the sidebar, make sure the Edit switch is set to **Edit**.
4. To edit a particular page, locate the page using the site tree in the sidebar or using the site's own navigation.

   To show the site tree, click , then click .
5. Add and change page content as necessary. Slide the Edit switch to use the layout options to see how the page will look on different devices and with different sizes. Several sizes are given and you can create your own device size. Click to see markings. Click an interval on the ruler to quickly see how the site appears at different sizes. You can also select to see how a site will appear on a mobile device depending on orientation.
6. When you're done editing your site, save your changes in one of the following ways:
   - Click **Save** to save your changes to the current update. You can continue working in the current update or return to the update later.
   - Click **Publish** to apply your changes directly to the base site. If the site is online, changes you publish will be immediately visible on the online site.

   When you publish the changes in the current update, the changes are made to the base site and the update is deleted. You must use an active update each time you view or edit a site in the editor, so you're returned to the site list where you can create a new update.

See Editing Sites for complete details about using the site editor.

How do I make a site online or offline?

When a site is *online*, users can view it with a standard web browser at a designated address (URL). When a site is *offline*, the site isn't available for public viewing. You can view the site only in Oracle Content and Experience Cloud.

A status icon to the right of the site name shows if the site is online or offline .

> **Note:**
>
> If you are the site owner or have the manager role, you can restrict online sites to be available to registered users only. See How do I change site security?

To change the status of a site, you must be the site owner or have the manager role:

1. On the home page, select the site from the list.
2. Click **Change Status** in the menu bar or click the status icon.

   You're prompted to confirm your choice.
3. Click **Confirm to proceed** and then click **OK**.

   The status icon changes to and includes text updates as the site is queued and published. The status icon changes to when the site is online.

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name. The format of the default URL is:

```
https://service_name.identity_domain.sites.oraclecloud.com/site_name
```

When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud.

How do I change the site description, logo, or embed properties?

Most site properties are set when you create or update a site. When you view properties, you can get valuable information about a site, including the site URL, site owner, and other details.

To change the site description, its logo, and to allow the site to be embeddable:

1. On the home page, right-click the site and choose **Properties**.
2. To change the optional description of the site, click the **Site Properties** tab and enter or change the description.

3. You can't change the site URL directly, but you can select and copy the site URL and then paste it into documents, presentations, and email to provide access to the site.

   If the site is online, click to go directly to the online site.

4. To allow the site to be used as an embedded site, select **Yes** next to **Embeddable Site**.

5. To change the site image, click the **Site Logo** tab, then click **Change**. Find and select the image to use. It must be a .png, .jpeg, or .jpg file and have a 4:3 (rectangular) ratio. The best size is 300x225 pixels because smaller images might be distorted and bigger ones might affect performance.

6. When finished, click **Done**.

Is my site secure?

You can apply security to control who can see the published (online) site, who can see and interact with secure content on the site, and who can see and edit the unpublished (offline) site.

Site Security

When you publish a site and make it available online, it's publicly available to anyone. However, if you're the site owner or have the manager role, you can change the security settings for the site to require users to log in. You can also require that users have a specific role assigned to them.

> **Note:**
>
> The site must be offline to change site security. When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud.

When you secure a site, you specify which groups of users can access your published (online) site based on an assigned role. These roles are service-wide roles assigned by an administrator of the service instance.

- **All Authenticated Users**: Authenticated users sign in to the service instance with a user name and password. This includes all authenticated users with or without the **Oracle Content and Experience Cloud Visitors** role or the **Oracle Content and Experience Cloud Users** role.
- **Oracle Content and Experience Cloud Visitors**: Only users with this role can access the site. For example, this role might be given to users who can see published sites, but don't have access to folders and files in Oracle Content and Experience Cloud.

> **Note:**
>
> This doesn’t include users with the **Oracle Content and Experience Cloud Users** role unless they’re the site owner or the site was explicitly shared with them.

- **Oracle Content and Experience Cloud Users**: Only users with this role have access to the site. For example, this role might be given to users who can both see published sites and have access to folders and files in Oracle Content and Experience Cloud.
- **Individual Users**: Only the users you add as members of the site can see the published site.

Site Sharing

With *site sharing*, you specify individual users who can access your unpublished (offline) site and allow them to view, modify, or manage the site based on the permission you give them. You can share a site if you’re the site owner or if the site was shared with you and you were given the Manager role.

> **Note:**
>
> Any sharing role you assign to a user augments their security role. For example, if a user has the **Oracle Content and Experience Cloud Visitors** role, but you share the site and give them a contributor role, they can modify the offline site while others with the **Oracle Content and Experience Cloud Visitors** role can only view the online site.

- **Viewer**: Viewers can view the site in the editor, but can’t change anything.
- **Downloader**: For a site, this has the same privileges as the viewer role.
- **Contributor**: Same as viewer, and can also edit the site, delete site pages, and delete the site if it’s offline.
- **Manager**: Same as contributor, and can also add users and assign their roles, publish changes to an online site, and switch the site online and offline. The creator of a site (the owner) is automatically assigned the manager role.

Component Sharing

Some components provide access to shared resources such as folders, files, or conversations. *Component sharing* considers both site security (who can view the published site) and resource sharing (who can view and work with folders, files, and conversations).

For example, when you add a document manager component to your site, all visitors to the site can see the content of the folder, and based on their role and any other permissions, they may be able to add, modify, or delete what’s in the folder.

General considerations:

- A site author can’t grant access to a folder that’s greater than the access they themselves have. For example, if the author has downloader access to a folder, they can’t give contributor rights to site visitors.

- The privileges set in the component can augment the visitor's privileges. For example, if the visitor has viewer privileges (or no privileges) for a folder, the documents manager component can grant greater privileges based on the role selected in the component. These enhanced privileges are valid only in the component itself.
- If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.
- Privileges granted on a folder apply to the folders and files nested in that folder.

For public sites:

- Conversation components are supported on secure sites only.
- Documents manager components give all visitors downloader privileges for the associated folder by default. You can change the role within the guidelines listed above, and you can restrict the options presented to the user with settings on the component itself.
- Folder list and file list components grant all users downloader access. Users can view and download files regardless of their role.

Secure Sites URL

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name.

The format of the default URL for unsecured sites is:

`https://service_name.identity_domain.sites.oraclecloud.com/site_name`

The format of the default URL for secured sites is:

`https://service_name.identity_domain.sites.oraclecloud.com/authsite/site_name`

Note the addition of `authsite` in the URL.

How do I change site security?

When you publish a site and make it available online, it's publicly available to anyone. However, if you're the site owner or have the manager role, you can restrict online sites to be available to registered users only.

Within the group of registered users, you can also restrict the site to specific users, or to users with a specific role.

> **Note:**
>
> To change the sign-in requirement, the site must be offline. To change the specified users or user roles, however, the site can be online. When you take a site offline, the site and its folders and files are removed from the hosting location in Oracle Cloud.

To change the status of a site, you must be the site owner or have the manager role. To take a site offline, select the site from the home page and click **Change Status** in the menu bar or click the status icon. You're prompted to confirm your choice.

To change site security:

1. On the home page, right-click the site and choose **Share**.
2. Click the **Site Security** tab.

   If the status icon indicates that the site is currently online, you can change the specified users or user roles if sign-in is enabled, but you can't change the requirement itself.
3. To require registered users to sign in to see the site when it's online, click **Yes** next to Login Required. To remove the requirement and make the site publicly available when it's online, click **No** next to Login Required.
4. Select which groups of registered users can access the online site. To select individual groups, first deselect **All Authenticated Users**.
   - **All Authenticated Users**: Only authenticated users have access to the site. Authenticated users sign in with a user name and password. This includes users with either the **Oracle Content and Experience Cloud Visitors** role or the **Oracle Content and Experience Cloud Users** role.
   - **Oracle Content and Experience Cloud Visitors**: Only users with this role have access to the site. This doesn't include users with the **Oracle Content and Experience Cloud Users** role.
   - **Oracle Content and Experience Cloud Users**: Only users with this role can access the site.
   - **Select individual users**: Specify individuals who can access to the site. Click **Add Members**. Enter a user name or a portion of a user name in the search field. Select the user from the displayed list and repeat to add more users. When done, click **Add**. To remove a user, click **Remove** from the menu below the user's name.
5. Click **Save** to save your changes and close the window.

   The site shows that it's offline and that login is required.

6. To make the site online, click **Change Status** in the menu bar or click the status icon. Click **Confirm to proceed** and then click **OK**.

When you make a site online, a fully rendered HTML version of the site is created and copied to the hosting location in Oracle Cloud. An online site shows its URL below the site name.
The format of the default URL for unsecured sites is:

```
https://service_name-identity_domain.sites.oraclecloud.com/site_name
```

The format of the default URL for secured sites is:

```
https://service_name-identity_domain.sites.oraclecloud.com/authsite/site_name
```

Note the addition of `authsite` in the URL.

You can add a logout URL and implement it as a link, or a button, or a page that shows up in the menu. See How do I use paragraphs?, How do I use buttons?, and How do I add a linked page?

The format of the logout URL is:

https://login.us2.oraclecloud.com/oam/server/logout?end_url=https://*service_name-identity_domain*.sites.us2.oraclecloud.com:443/**authsite**/*site_name*

Using Templates

If you're a site author, a template has everything you need to get started. If you're a site developer, a template has everything you need to customize and create your own templates. Let's learn about what you can do with templates.

- What is a template?
- What kinds of templates are there?
- How do I create a template from a site?
- How do I change template details?
- How do I manage templates?
- How do I export a template?
- How do I import a template?

What is a template?

A template has everything you need to get started with your site, including the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and even custom components.

Where do I get templates?

Oracle Content and Experience Cloud provides a number of templates that you can use to create sites. Just select a template, name the site, and you can start adding content right away. These templates are typically installed by a service administrator when the service is initialized.

You can also create a template from an existing site, or you can export an existing template, modify it offline, and import it as a new template. Your organization may have templates for you to use.

How do templates work?

When you create a site, the template is used as follows:

- The default site in the template is copied to the new site to provide a starting point for your pages.
- All necessary support files are copied to the new site.
- If the template theme doesn't exist in the themes folder, the theme is copied to the themes folder. The site references the theme from its location in the themes folder. If the theme exists, the new site simply references the existing theme.
- If there are custom components that don't exist in the components folder, they're copied to the components folder. The site references the components from their locations in the components folder. If any of the components exist, the new site references the existing components.

Can I make my own templates?

If you're a web developer, a template collects all the pieces you need to construct a website in one package including the site, layout, navigation, sample content, and so on. You can add components and interactions to the site to provide ready-made site solutions that meet your business needs.

A template is represented by a folder structure that you can work with like other folders. Some elements of the template, such as the theme and custom components, are referenced from their associated locations in Oracle Content and Experience Cloud. For example, a template references the associated theme from the list of available themes like a site references a theme.

If you create a template from an existing site, the new template uses a copy of the site as its default site. The template references the theme used by the site and any custom components used in the site pages. The theme and custom components aren't copied to the template, but are referenced in the same way they are by the site.

> **Note:**
>
> The template reflects the site used at the time the template is created. Further changes to the site that was used to create the template aren't reflected in the site stored with the template.

You can create content templates which can be used to share content models, which includes content layouts, content items, and digital assets that are needed to support a content model (such as sample content). Content templates should be created from sites with published content items and digital assets. Note that content types are not created when a site template is imported from a package with content. They are created when a site is created from the content template. Therefore, content types are not owned by the user who imports the site template. Instead, content types are owned by the user who creates a first site from that template. That user can then share the template with other users as needed. This feature may not be available depending on the Content and Experience Cloud subscription type and start date of your service.

When you export a template, all elements of the template, including a copy of the theme and any components, are collected in a template package that you can download and work with offline.

If you import a template you modified offline, and if the template, theme, or custom component names or IDs already exist, you're prompted to resolve the conflicts. You may be given the option to create a new template, theme, or custom component, or in some cases, you can overwrite the existing template, theme or custom component with the imported version. See Developing Templates in *Developing for Oracle Content and Experience Cloud*.

Who can use a template I create?

When you create a template, whether by importing, copying, or creating from a site, the template can't be used by anyone else until you share it.

> **Note:**
>
> This is also true for the templates provided with Oracle Content and Experience Cloud and installed by an administrator. If you don't see any templates, contact your administrator. They may not have been shared with you.

When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the downloader role to ensure that they're available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components.

What kinds of templates are there?

A template can provide you with a targeted site solution with layouts and assets you can use to guide results.

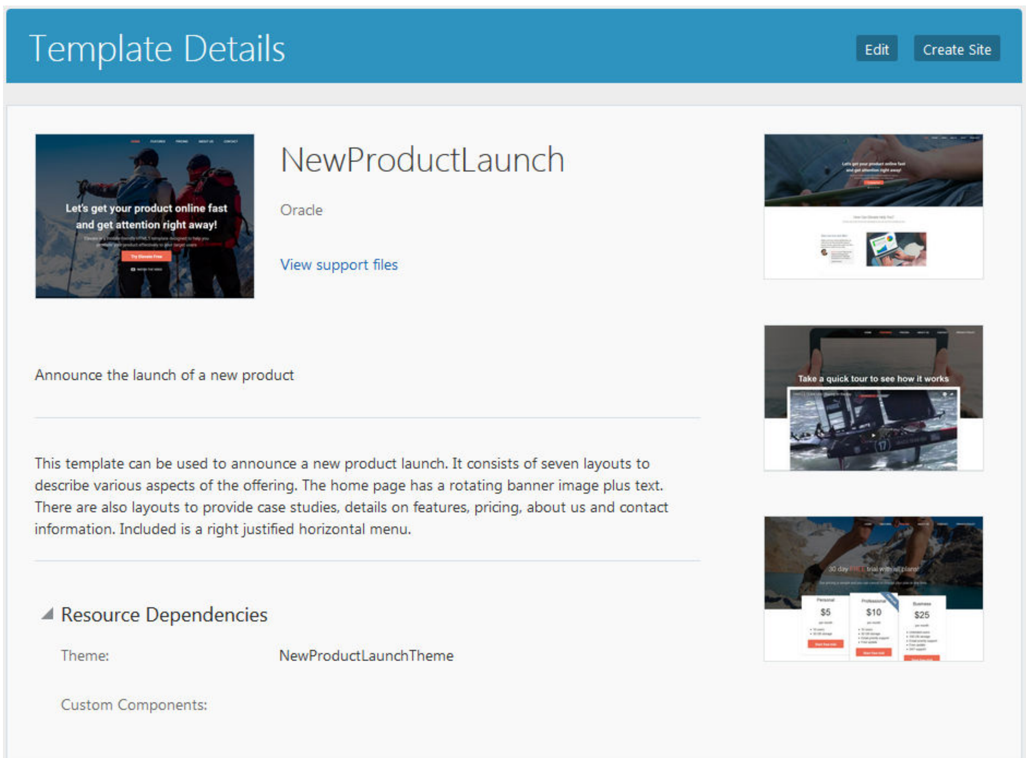
There are a number of templates to get you started.

Template	Description
Collateral Showcase	The Collateral Showcase template has a right justified horizontal menu style, simple page layouts, and top-level pages that list related video assets followed by nested detail pages each showcasing a particular video. It features a standard menu component and shows the current logged in user.
New Product Launch	The New Product Launch template has a right justified horizontal menu and layouts for case studies, details on features, pricing, your company, and contact information. The home page has a rotating banner image plus text.
Products and Services Overview	The Products and Services Overview template has layouts for case studies, details about the product offering, your company, privacy policy and more. The home page has a rotating banner image plus text. The template is fully responsive.
Starter Template	Use the Starter template to create your own ready-made site solutions. The starter template provides a simple, yet fully functional example that you can explore and expand with components and interactions. It includes the site code framework, a default site with sample pages and content, a theme with styling, resources such as images, and a custom component with trigger and action functionality. The sample pages include information about creating templates with links to resources providing more detailed information.
Learn **Present** **Show**	These templates are color-variations of each other. They are responsive and feature a custom JavaScript menu component within the group. They feature custom component groups that feature a number of standard components. They also show the logged in user.
Access **Knowledge** **Relate**	These templates are color-variations of each other. They are responsive and feature a custom JavaScript menu component within the group. They feature custom component groups that feature a number of standard components.

Template	Description
Share	This template is a site that features a single, long page. It is responsive and features a custom JavaScript menu that navigates to locations on the page rather than to separate pages.

Templates can provide additional information such as support files or preview images that don’t appear in any associate website, but provide information about the template itself.

You can change the icon, and add or change preview images and support files, and see resource dependencies, such as the associated theme and any custom components that might be included with the template.



For information about developing templates, see Developing Templates in *Developing for Oracle Content and Experience Cloud*.

How do I create a template from a site?

If you have a site that you want to use as a starting point for other sites, you can create a template from that site.

> **Note:**
>
> To create a template from a site, you must have the Downloader, Contributor, or Manager role for the site.
> In addition, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the templates page, contact your administrator.

These steps show how to create a template from a site. You can also import a template package that you created or modified offline. See How do I export a template? and How do I import a template?

To create a template from a site:

1. On the home page, click ☰ and click the **Experience** tab to view options.
2. You can create a template either from the templates folder or from the sites folder.
    a. Click **Templates**. Click **Create**, then click **Create from existing site**.
    b. Click **Sites**. Select a site, then click **Create Template**.
3. In the Create Template dialog, select a site to use as the basis for your template. The list includes all the sites you've created and any sites that are shared with you.
4. Enter a name for the template. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.

    Don't use the following names for templates, themes, components, sites, or site pages:

    - authsite
    - content
    - pages
    - scstemplate_*
    - _comps
    - _components
    - _compsdelivery
    - _idcservice
    - _sitescloud
    - _sitesclouddelivery
    - _themes
    - _themesdelivery

Although you can use the following names for site pages, don't use them for templates, themes, components, or sites:

- documents
- sites

5. Enter an optional description for the template.
6. When you're ready, click **Create**.

When the template is created, the name appears in the list of templates. To view the folders and files associated with a template, right-click the template and choose **Open**. To view or change the name, description, and other details about the template, click the template name or right-click the template and choose **Details**.

The new template uses a copy of the site as its default site. The template references the theme used by the site and any custom components used in the site pages. The theme and custom components are not copied to the template, but are referenced in the same way they are by the site.

The template reflects the site used to create it at the time the template is created. Any changes to the site used to create the template are not reflected in the site stored with the template.

How do I change template details?

If you have the appropriate permissions, you can change or update template properties such as the name, description, and the icon used in the template list. You can also add support files and preview images for users of the template.

You can update template details if you created the template (you're the template owner) or if someone shared a template with you and gave you a Contributor or Manager role.

If you add support files or preview images, the files are stored in the Assets template folder. These file don't appear in any associate website, but allow the template owner to provide information about the template itself.

To view or change template details:

1. On the home page, click and click the **Experience** tab to view options.
2. Click .
3. Click the template name or right-click the template and choose **Details**. To change the information, click **Edit**.

   To view the folders and files associated with a template, right-click the template and choose **Open**.
4. To change the name, author, or description values, click in the field and make your changes.
5. To delete the image used for the template in the template list, click on the image and click **Yes**.
6. To change the icon, click . Find the image you want to use or click **Upload** to upload an image stored locally. The image should be 50x50 pixels. Smaller images might appear distorted and larger ones might affect performance.

7. To add or change support files for the template, click **Upload Support Files**. Locate and select the file you want to use or click **Upload** to upload a file stored locally.
8. To add or change preview images for the template:
   - To delete a preview image, click on the image and click **Yes**.
   - To add a new preview image, click an empty preview image, locate and select the file you want to use or click **Upload** to upload a file stored locally.

     To change a preview image, click , locate and select the image you want to use or click **Upload** to upload an image stored locally.
9. Click **Save** to save any text changes. Image and support file changes are saved automatically.
10. To return to the list of templates, click .

How do I manage templates?

You can copy, rename, and delete a template folder like you would any other folder, but a template has special considerations when you import or share them.

Use options on the menu bar or right-click menu on the Templates page to perform any of these tasks.

Task	Description
Create a template	If you have a site that you want to use as a starting point for other sites, you can create a template from that site. **Note:** You must have the Downloader, Contributor, or Manager role for the site, and your administrator must enable the option. If you don't see the **Create** menu on the templates page, contact your administrator. On the templates page, click **Create**, then click **Create from existing site**. Select a site, name your template and click **Create**. See How do I create a template from a site?
Edit a template	If you're a web developer, you can download and modify individual template files or you can use the desktop app and synchronize the changes you make on your local system. You can also export the template package, which includes the associated theme and any custom components, and work with it offline in your preferred development environment. A template is represented by a folder structure that you can work with like other folders. See Managing Your Files and Folders. When you export a template, all elements of the template, including a copy of the theme and any components, are collected in a template package that you can download and work with offline. See Developing Templates in *Developing for Oracle Content and Experience Cloud*.

Task	Description
Copy a template	You can create a template by copying an existing template and making changes to the copy. **Note:** When you copy a template, sharing information associated with the template isn’t copied. Right-click the template you want to copy and choose **Copy**. Enter a name for the template that’s different from any other template on the same server. For other naming guidelines, see How do I create a template from a site? A progress bar shows the new template name and copy status. You can explore the folders and files that make up the template by selecting the template and choosing **Open**. You can modify template details, such as the description, icon, and support files by clicking the template name or by selecting the template and choosing **Details**.

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td>Share a template</td><td>When you share a template with other Oracle Content and Experience Cloud users you assign a role that defines what the user can do with the template. You can share a template if you’re the owner or if you’re assigned the Manager role.

Note:
Any of the roles you assign to a user give the user permission to create a site from the template.

Some features of the template, such as the theme and custom components, aren’t stored in the template, but are referenced from their associated locations in the online environment. For example, a template references the associated theme from the list of available themes in much the same way that a site references a theme.

When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the Downloader role to ensure that they are available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components.

Right-click the template you want to share, choose Share, and click Add Members.

Enter one or more user names or email addresses, and assign one of these roles:
Viewer: Viewers can view the folders and files of the template, but can’t change things.
Downloader: Downloaders can also download files and save them to their own computer.
Contributor: Contributors can also edit template details and template files, upload new files, delete files, and delete the template itself.
Manager: Managers can also add users and assign their roles. The creator of a template (the owner) is automatically assigned the manager role.</td></tr>
<tr><td>Rename a template</td><td>Right-click the template you want to rename and choose Rename. Enter a name for the template that’s different from any other template on the same server. For naming guidelines, see How do I create a template from a site?</td></tr>
<tr><td>Export or import a template</td><td>You can export a template to modify it offline and then import it either as a new template or to replace the existing template. You can also export a template to move it to another instance and import it there.

When you export a template, you copy the template to a folder as a single .zip file. You can download the template package directly from the folder to unpack and work with the individual files. When you’re done working with the files, create a .zip file containing the template package, import it, and overwrite the original template or create a new one.

See How do I export a template? and How do I import a template?</td></tr>
</table>

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td>Delete or restore a template</td><td>
If you have the appropriate permissions, you can delete a template folder and its contents. When you delete a template, the template folder and all its associated folders and files are moved to the trash.
You can delete or restore a template if you created the template (you’re the template owner) or if someone has shared a template with you and has given you the contributor or manager role.
Note:
When you delete a template, the associated theme and custom components are not deleted.
To delete a template, right-click the template you want to delete and choose Delete. You are prompted to move the template to the trash. A deleted template stays in the trash until:

You restore the template.
You permanently delete the template.
Your trash quota is reached.
The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days.

To restore a template, click Trash, then right-click the template from the list and choose Restore.
</td></tr>
</table>

How do I export a template?

You can export a template to modify it offline and then import it either as a new template or to replace the existing template. You can also export a template to move it to another Oracle Content and Experience Cloud instance and import it there.

When you export a template, you essentially copy the template to a folder in Oracle Content and Experience Cloud as a single .zip file. You can download the template package directly from the folder to unpack and work with the individual files. When you’re done working with the template files, create a .zip file containing the template package and import it into your site and overwrite the original template or create a new one.

> **Note:**
>
> When you export a template, sharing information for the template isn’t included.

To export a template:

1. On the home page, click and click the **Experience** tab to view options.
2. Click **Templates**.
3. Right-click a template and choose **Export**.

4. Navigate to a folder or create a new folder by clicking **Create**, providing a name and an optional description, and clicking **Create**.
5. Select a folder by clicking the checkbox for the associated folder and click **OK**.

How do I import a template?

You can export a template to modify it offline and then import it either as a new template or to replace the existing template. You can also export a template to move it to another Oracle Content and Experience Cloud instance and import it there.

Before you can import a template, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the templates page, contact your administrator.

When you export a template, you essentially copy the template to a folder as a single .zip file. You can download the template package directly from the folder to unpack and work with the individual files. When you are done working with the template files, create a .zip file that contains the template package, import it and overwrite the original template or create a new one.

> **Note:**
>
> If you import a template to a different server, some links in the default site may not be valid in the new server context. If the site uses reference links to images or other content rather than copying the content directly into the site, that content is not available on the new server. Even if you copy the content to the new server, the content will have a different internal ID, and the link will not be valid. When you import the template, you are notified of the pages that contain invalid reference links.

To import a template package:

1. On the home page, click and click the **Experience** tab to view options.
2. Click **Templates**.
3. Click **Create** and choose **Import a template package**.
4. If you've uploaded a template package, navigate to the folder that contains the template package and open the folder. If you haven't uploaded the template package yet, go to the folder where you want to upload it or create a new folder. Click **Upload** and then locate and select the template package and click **Open**.
5. To use a template, click the checkbox next to the template file name and click **OK**. New folders are created for the template, its associated theme, and any custom components. If the template, theme, or custom component names or IDs exist, you're prompted to resolve the conflicts. You may need to create a new template, theme, or component, or you can overwrite the existing items with the imported version.

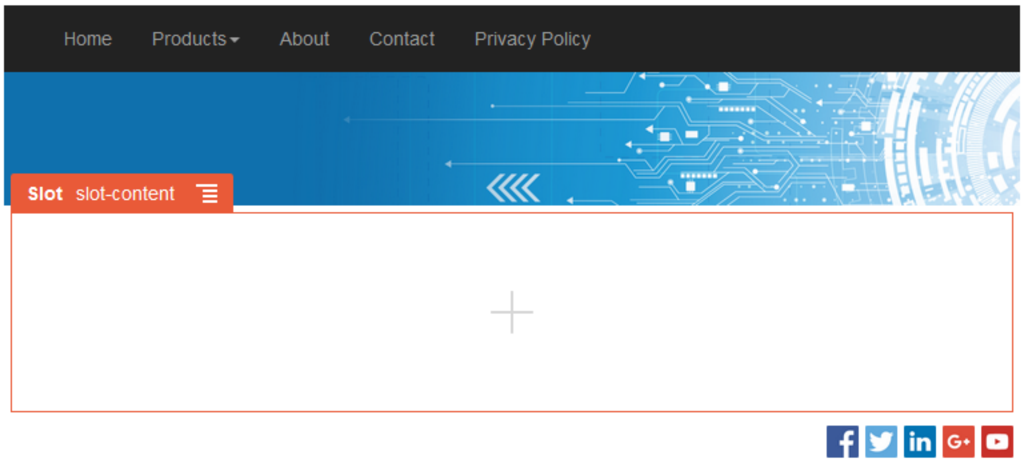
Working with Themes

A theme defines the overall style of a site. Let's learn about what you can do with the themes you own.

- What is a theme?
- How do I manage themes?
- How do I publish a theme?

What is a theme?

A *theme* defines the general look-and-feel—the overall style—of a site, including color scheme, font size, font type, and page backgrounds. Themes provide visual consistency between the pages in the site. You adjust the design and add content to create a site that sells your style, your brand, and your vision.



A theme includes:

- Page layouts
- Cascading style sheet (CSS)
- Variations on the style sheet
- Configuration files
- Background code that defines site navigation

Each website uses a theme. When you create the site from a template, you inherit the theme from the template. You can change the theme for a site at any time.

Oracle Content and Experience Cloud provides a number of templates with themes that you can use to get started. To create a new theme, copy an existing theme. You can download and modify the theme files, or you can use the desktop app and synchronize the changes you make on your local system. For information about other ways to create themes, see Developing Themes in *Developing for Oracle Content and Experience Cloud*.

If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. Only the theme owner or a user with Manager privileges can explicitly publish a theme.

> **Note:**
>
> If you publish changes to a theme, all online sites that use the theme reflect the change. For example, if you change the default font in the theme and publish the theme, all sites using the theme will use the new default font.

How do I manage themes?

You can copy, rename, and delete a theme folder like you would any other folder, but a theme does have special considerations because they can be shared by more than one site.

You use options on the menu bar or the right-click menu on the Themes page to perform these tasks.

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td>Create a new theme</td><td>To create a new theme, copy an existing theme. For information about other ways of creating themes, see Developing Themes in Developing for Oracle Content and Experience Cloud.</td></tr>
<tr><td>Copy a theme</td><td>You can create a new theme by copying an existing theme and making changes to the copy.

Note:
When you copy a theme, sharing information associated with the theme isn’t copied.

Right-click the theme you want to copy and choose Copy. Enter a name that isn’t used by another theme. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. Click Copy.

Don’t use the following names for templates, themes, components, sites, or site pages:
authsite
content
pages
scstemplate_*
_comps
_components
_compsdelivery
_idcservice
_sitescloud
_sitesclouddelivery
_themes
_themesdelivery
Although you can use the following names for site pages, don’t use them for templates, themes, components, or sites:
documents
sites</td></tr>
</table>

Task	Description
Share a theme	If your administrator enabled sharing, you can share your theme with other Oracle Content and Experience Cloud users. You can share a theme if you’re the owner or if you’re assigned the Manager role. When you share a theme, you assign a role defining what the user can do with the theme. **Note:** When you share a template with a user for the first time, the associated theme and any associated custom components are automatically shared with the user and given the Downloader role to ensure that they are available if the user creates a site from the template. Subsequent changes in the template to the role for that user do not update the sharing information for the associated theme or custom components. Right-click the theme you want to share, choose **Share**, and click **Add Members**. Enter one or more user names or email addresses, and assign one of these roles: • **Viewer**: Viewers can view the folders and files of the theme, but can’t change things. • **Downloader**: Downloaders can also download files and save them to their own computer. • **Contributor**: Contributors can also edit the theme, upload new files, delete files, and delete the theme itself. • **Manager**: Managers can also add users and assign their roles. The creator of a theme (the owner) is automatically assigned the manager role.
Edit a theme	If you’re a web developer, you can download and modify individual theme files or you can use the desktop app and synchronize any changes you make on your local system. See Managing Your Files and Folders. You can also export a template package, which includes the associated theme and any custom components, and work with it offline in your preferred development environment. See Developing Themes in *Developing for Oracle Content and Experience Cloud*. If you make changes to a theme, you must publish the theme for those changes to be reflected by the sites using the theme.
Publish a theme	If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. You can publish a theme if you’re the owner or if you’re assigned the Manager role. Select the theme in the list and click **Publish** (or **Republish** for previously published themes) in the menu bar. If this is the first time the theme is published, a published icon is added next to the theme in the list. See How do I publish a theme?.

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td>Delete or restore a theme</td><td> If you have the appropriate permissions, you can delete a theme folder and its contents. When you delete a theme, the theme folder and all its associated folders and files are moved to the trash.
You can delete or restore a theme if you created the theme (you’re the theme owner) or if someone shared a theme with you and gave you the Contributor or Manager role.
Note:
You can’t delete a theme if it’s used by any site.
To delete a theme, right-click the theme you want to delete and choose Delete. You’re prompted to move the theme to the trash. A deleted theme stays in the trash until:

You restore the theme.
You permanently delete the theme.
Your trash quota is reached.
The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days.

To restore a theme, click Trash, then right-click the theme from the list and choose Restore. </td></tr>
</table>

How do I publish a theme?

A theme defines the general look-and-feel of a site. You can update a theme to change the appearance of any sites using the theme.

If a site uses a new, unpublished theme, the theme is automatically published with the site when you place the site online for the first time. If you make changes to a theme and want to update online sites to show the changes, you must explicitly publish the theme. To publish changes to a theme, you must be the theme owner or have the Manager role.

> **Note:**
>
> If you publish changes to a theme, all online sites using the theme reflect the change. Make sure you tested your changes offline and that you understand the impact on the associated sites before you publish updates to a theme.

To publish a theme:

1. On the home page, click and click the **Experience** tab to view options.
2. Click **Themes**.
3. Select an existing theme from the list of themes.
4. Click **Publish**.

5. Click **Confirm to proceed** and then click **OK**. If this is the first time the theme is published, a published icon is added next to the theme in the list.
6. To return to the home page to create and work with sites, click , click the **Experience** tab, and click **Sites**.

Managing Custom Components and Layouts

As a developer, you can create and manage custom components and layouts. As a site contributor, you can register third-party components (apps) and component groups.

Custom components include component groups you create in the editor, and local and remote components you create using options described in this section. Custom layouts include *section layouts* for arranging components in a slot on a page and *content layouts* for arranging the fields in a content item.

- What is a component?
- What is a custom component?
- What is a layout?
- What can I do with custom components and layouts?
- How do I register a remote component?
- How do I create a local component or layout?
- How do I export a component or layout?
- How do I import a component or layout?

To learn how to use components with your site, see Adding Content to a Page.

For information about using individual components, see Working with Site Content.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

What is a component?

Components are the individual parts of a web page. When you look at a web page, what do you see? You probably see a few titles, some paragraphs of text, and several links to other pages in the site. You might also see images, buttons, dividers, maps, and galleries. Each of these items is a component.

To add a component to a page, make sure that is set to **Edit**, click and then to show the list of built-in components or to show the list of custom components.

Drag the component from the panel and drop it into a slot on the page. That's it. Drag and drop titles, paragraphs, images, and other components where you want them on a page.

See What is a site component? for complete details about using built-in components on your site.

Custom Components

You can easily register and incorporate remote components (apps) and even create your own components using options in the component manager.

On the home page, click ☰, click the **Experience** tab, and click ⧉.

Click **Create** and select the associated option to create a new local component or register a remote component. Components you create and share in this way are listed in the custom components panel in the editor.

Custom Component	Description
Remote Components	You can register your own or third-party remote components (apps) hosted on a server other than the server where Oracle Content and Experience Cloud is hosted. Remote components are enclosed in an inline frame (using an iframe element). Not all remote components can be enclosed in an inline frame. Check with the provider to see if it can be enclosed.
Local Components	Developers can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud. You can choose to insert the component directly into the page or enclose it in an inline frame (using an iframe element). When you click **Create** to create a local component, a fully-functional sample component is added to the list of components with a name you specify and a unique identifier. As a developer, you can modify the sample to create your own solutions.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

What is a custom component?

You can register and incorporate third-party apps (remote components) and create your own local components using options in the component manager.

Remote Components

If you have a third-party component (app) that you want to use, just register it and use it in your site. It’s that easy.

When you register a remote component, you specify the URL for the remote component itself and a second URL for any settings that a web author can specify for the remote component.

After you register a remote component, you can share it with other users. Any registered remote components that you own or that are shared with you are listed in the Custom Components panel in the site editor.

You can change the properties for a remote component within the editor the same way you do for any other component. Just click the menu icon ☰ and choose **Settings**.

The **Custom** button opens the settings URL you specified when you registered the remote component.

> **Note:**
>
> Because remote components are hosted on a server other than the one hosting Oracle Content and Experience Cloud, they're enclosed in an inline frame (using an iframe element) for security purposes. Not all remote components can be enclosed in an inline frame. Check with the provider to find out if it can be enclosed.

Local Components

Developers can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud. You can insert the component directly into the page or enclose it in an inline frame with the iframe element.

When you click **Create** to create a local component, a fully-functional sample component is added to the list of components with a name you specify and a unique identifier. As a developer, you can modify the sample to create your own solutions.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

What is a layout?

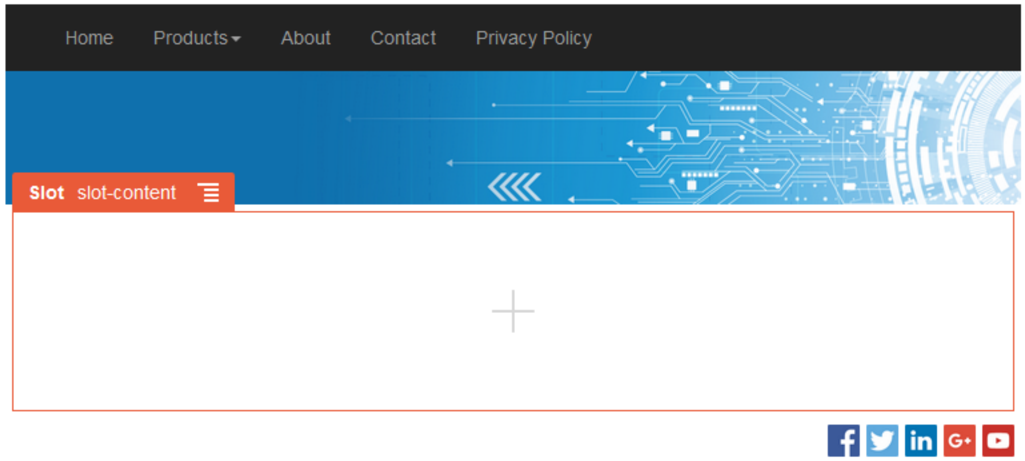
A page layout arranges slots and content on a page. A section layout arranges content within a slot. A content layout arranges the fields in a content item.

In general, a layout specifies the presentation of content, but not the content itself. Separating the content from its presentation makes it easier to present the same content in different ways or to change the presentation without having to touch the content.

Page Layout

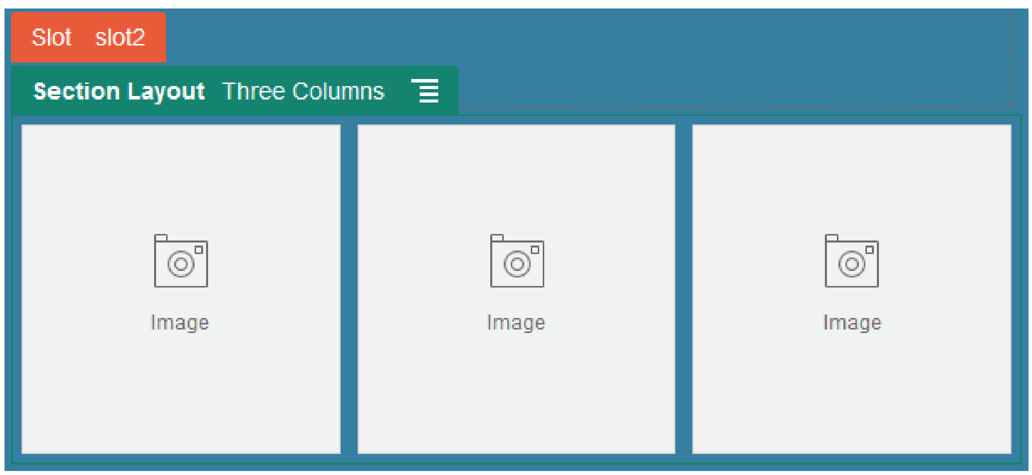
When you add a page to a site, you select a layout to use for that page. Each layout has areas on the page, called slots, where a contributor can drag and drop content. A page layout defines the number and position of slots on the page. A layout can also include content that is predefined and positioned on the page. This content can be static and not editable, such as a company logo, or it can be minimally editable, such as heading text that a contributor can change, but the position or appearance of which they can't.

Page layouts are stored in the theme. Themes can have one or more page layouts. As a developer, you can copy and modify an existing theme to create a new theme. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.



Section Layout

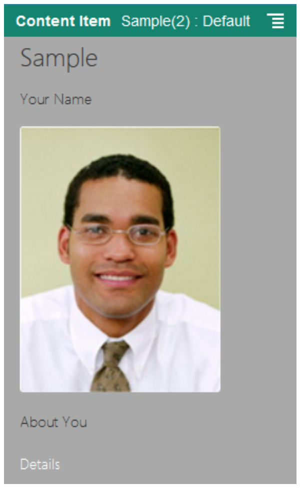
A section layout automatically organizes content added to it, making it easy for a contributor to add content without spending time formatting it on the page. For example, a section layout can automatically organize content into multiple columns or into a vertical list. A site contributor can add one or more section layouts to a slot to organize content. See How do I add content to a page?



In addition to the layouts provided, a developer can create additional section layouts to solve particular layout problems or to simplify authoring for contributors. A theme designer can even build section layouts into a slot in a page layout. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.

Content Layout

If you are an enterprise user, you can create and use content items based on content types and layouts provided for you. Content structured in this way makes it possible for you as a contributor to assemble the content for a content item outside of the site editor. Multiple content layouts associated with the content type make it possible for the site designer to display the content item in different contexts without having to touch the assembled content. As a developer, you can create new layouts from the default layout provided. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.



What can I do with custom components and layouts?

As a developer, you can create and manage custom components and layouts. As a site contributor, you can register third-party components (apps) and component groups.

Custom components include component groups you create in the editor, and local and remote components you create using options described below. If you have a third-party app (remote component) that you want to use, just register it and use it in your site. Developers can also create local components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud.

Custom layouts include *section layouts* for arranging components in a slot on a page and *content layouts* for arranging the fields in a content item.

Use options on the menu bar or right-click menu on the Components page to perform the following tasks.

Task	Description
Register a remote component	When you register a remote component, you specify the URL for the remote component itself and a second URL for any settings that a web author can specify for the remote component. Before you can create a component, your administrator must enable the options in the **Create** menu. If you don’t see the **Create** menu on the components page, contact your administrator. Click **Create** and select the associated option to register a remote component. See How do I register a remote component?

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td>Create a local component or layout</td><td>When you create a local component or layout, you are given a fully-functional sample component or layout that you use as a basis for creating your own component or layout.

Before you can create a component or layout, your administrator must enable the options in the Create menu. If you don’t see the Create menu on the components page, contact your administrator.

Click Create and select the associated option to create a new local component or layout. See How do I create a local component or layout?

For information about other ways to create components, see Developing Components in Developing for Oracle Content and Experience Cloud.</td></tr>
<tr><td>Copy a component or layout</td><td>You can create a new component or layout by copying an existing component or layout and making changes to the copy.

Note:
You can’t change the name of a component or layout after you create or register it. You can copy a component or layout and specify a different name for the copy. All the other registration information, including the key value for remote components, are preserved. Sharing information is independent from registration information and isn’t copied.

Right-click the component or layout you want to copy and choose Copy. Enter a name and click Copy. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. For other naming guidelines, see How do I create a local component or layout?</td></tr>
<tr><td>Share a component or layout</td><td>You can share your component or layout with other Oracle Content and Experience Cloud users. You can share a component or layout if you’re the owner or if you’re assigned the Manager role. When you share a component or layout, you must assign a role to the user defining what the user can do with the component or layout.

Right-click the component or layout you want to share, choose Share, and click Add Members.

Enter one or more user names or email addresses, and assign one of these roles:
Viewer: Viewers can see and use the component or layout in the list of custom components and layouts in the editor. They can also view the folders and files of the theme, but can’t change things.
Downloader: Downloaders can also download files and save them to their own computer.
Contributor: Contributors can also edit the component or layout, upload new files, delete files, and delete the component or layout itself, provided it is not in use in a site.
Manager: Managers can also add users and assign their roles. The creator of a component or layout (the owner) is automatically assigned the manager role.</td></tr>
</table>

Task	Description
Edit a component or layout	If you're a web developer, you can download and modify individual component or layout files or you can use the desktop app and synchronize any changes you make on your local system. See Managing Your Files and Folders. You can also export a component or layout individually or as part of a template package, which includes the any custom components and section layouts, and work with it offline in your preferred development environment. If you make changes to a component or layout, you must publish the component or layout for those changes to be reflected by the sites that use the component or layout.
Export or import a component or layout	You can export a component or layout to modify it offline and then import it either as a new component or layout or to replace the existing component or layout. You can also export a component or layout to move it to another instance and import it there. You can export a component or layout individually or as part of a template package, which includes any custom components and layouts. When you export a component or layout, you copy the component or layout to a folder as a single .zip file. You can download the component or layout package directly from the folder to unpack and work with the individual files. When you're done working with the component or layout files, create a .zip file that contains the component or layout package, import it, and overwrite the original component or layout or create a new one. See How do I export a component or layout? and How do I import a component or layout?
Publish a component or layout	If a site uses a new, unpublished component or layout, the component or layout is automatically published with the site when you place the site online for the first time. If you make changes to a component or layout and want to update online sites to show the changes, you must explicitly publish the component or layout. You can publish a component or layout if you're the owner or if you're assigned the Manager role. Select the component or layout in the list and click **Publish** (or **Republish** for previously published components or layouts) in the menu bar. If this is the first time the component or layout is published, a published icon is added next to the component or layout in the list.

Task	Description
Delete or restore a component or layout	If you have the appropriate permissions, you can delete a component or layout folder and its contents. When you delete a component or layout, the component or layout folder and all its associated folders and files are moved to the trash. You can delete or restore a component or layout if you created the component or layout (you’re the component or layout owner) or if someone shared a component or layout with you and gave you the Contributor or Manager role. **Note:** You can’t delete a component or layout if it’s used by any site or update, including sites or updates in the trash. To delete a component or layout, right-click the component or layout you want to delete and choose **Delete**. You’re prompted to move the component or layout to the trash. A deleted component or layout stays in the trash until: • You restore the component or layout. • You permanently delete the component or layout. • Your trash quota is reached. • The trash is automatically emptied based on the interval set by your service administrator. The default value is 90 days. To restore a component or layout, click **Trash**, then right-click the component or layout from the list and choose **Restore**.

How do I register a remote component?

To use a remote component in a site, you must first register it in Oracle Content and Experience Cloud.

You can register third-party remote components and remote components that you developed.

> **Note:**
>
> Before you can register a remote component, your administrator must enable the options in the **Create** menu. If you don’t see the **Create** menu on the components page, contact your administrator.

To register a remote component for use in Oracle Content and Experience Cloud:

1. On the home page, click and click the **Experience** tab to view options.
2. Click .

   Any currently registered remote components are displayed.
3. Click **Create** and choose **Register Remote Component**.

4. In the Register Remote Component window, enter or select information including:
   - **Name**: Name of the component that users will see.
   - **Description**: Description of the component that users will see.
   - **Component URL**: The end point used in an iframe to render component content in a page. It must be HTTPS.
   - **Settings URL**: The end point used in an iframe to render the settings of a remote component added to a page. It must be HTTPS.
   - **Settings Width**: Sets the default width of the component settings panel in pixels.
   - **Settings Height**: Sets the default height of the component settings panel in pixels.
   - **Key**: A 192–bit AES key associated with the remote component and used to create a signed hash token when the component is provisioned. It’s used to encrypt and ensure component settings are read and written securely.
5. Click **Register**.

   When the remote component is created, the name appears in the list of components. You can explore the files used to register the component by clicking the component name in the list of components.

The component registration information is stored in the catalog used by sites created in the same Oracle Content and Experience Cloud instance, but the component remains a remote service.

As the component owner, component icon is added to the Custom Components panel in the editor with the name you assigned to the component. You can share the component with other users and they will see the component in the Custom Components panel in the editor.

How do I create a local component or layout?

As a developer, when you create a local component or layout, you are given a fully-functional sample that you can modify to your own component or layout.

Before you can create a component or layout, your administrator must enable the options in the **Create** menu. If you don’t see the **Create** menu on the components page, contact your administrator.

As a developer, you can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud.

To create a sample local component or layout:

1. On the home page, click  and click the **Experience** tab to view options.
2. Click .

   Any currently registered remote components and layouts are displayed.
3. Click **Create** and choose your option:
   - **Create Local Component**
   - **Create Content Layout**

- **Create Section Layout**

4. Enter a name for the component or layout. You can't use a name used by another component or layout.

   You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with an underscore.

   Don't use the following names for templates, themes, components, sites, or site pages:

   - authsite
   - content
   - pages
   - scstemplate_*
   - _comps
   - _components
   - _compsdelivery
   - _idcservice
   - _sitescloud
   - _sitesclouddelivery
   - _themes
   - _themesdelivery

   Although you can use the following names for site pages, don't use them for templates, themes, components, or sites:

   - documents
   - sites

5. Optionally, enter a description for the component or layout.

6. For local components, you can choose to insert the component directly into the page or select **Create a component that renders in an iframe** to enclose the component in an inline frame (using an iframe element).

7. Click **Create**.

   A progress bar shows the creation status. When the component or layout is created, the name appears in the list of components. You can explore the folders and files that make up the component or layout by clicking the component or layout name in the list of components.

8. To select an icon other than the default icon assigned to the component or layout:

   a. Select the component or layout from the list.
   b. Click **Properties**.
   c. Click the **Component Logo** tab.
   d. Click a logo from the gallery of logos and then click **Done**.

For detailed information about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

After you have customized your component or layout, you can share it with others so they can use it in the following ways:

- Custom Component: When you use the site editor, the component icon is added to the Custom Components panel in the editor with the name you assigned the component.
- Section Layout: When you use the site editor, the section layout icon is added to the Section Layouts panel in the editor with the name you assigned the layout.
- Content Layout: A content administrator can assign the layout to one or more content types, either as the default view or added to a list of layouts that a site designer can select in the site editor to specify how a content item of that type is displayed on the page.

How do I export a component or layout?

You can export a component to modify it offline and then import it either as a new component or to replace the existing component. You can also export a component to move it to another Oracle Content and Experience Cloud instance and import it there.

When you export a component, you essentially copy the component to a folder in the Oracle Content and Experience Cloud as a single .zip file. You can download the component directly from the folder to unpack and work with the individual files. When you are done working with the component files, create a .zip file that contains the component folders and files, import it, and overwrite the original component or create a new one.

> **Note:**
>
> When you export a component, sharing information for the component isn't included.

To export a component:

1. On the home page, click and click the **Experience** tab to view options.
2. Click **Components**.
3. Right-click a component or layout and choose **Export**.
4. Navigate to a folder or create new folder by clicking **New**, providing a name and an optional description, and clicking **Create**.

   To open a folder, click the folder icon or the folder name.
5. Select a folder by clicking the checkbox for the associated folder and click **OK**.

   A component or layout package file is created in the selected folder with the component or layout name and a .zip extension.

How do I import a component or layout?

You can export a component or layout to modify it offline and then import it either as a new component or layout or to replace the existing component or layout. You can also export a component or layout to move it to another Oracle Content and Experience Cloud instance and import it there.

Before you can import or create a component or layout, your administrator must enable the options in the **Create** menu. If you don't see the **Create** menu on the components page, contact your administrator.

When you export a component or layout, you essentially copy the component or layout to a folder as a single .zip file. You can download the component or layout directly from the folder to unpack and work with the individual files. When you're done working with the component or layout files, create a .zip file containing the component or layout, import it and overwrite the original component or layout or create a new one.

To import a component or layout:

1. On the home page, click and click the **Experience** tab to view options.
2. Click **Components**.
3. Click **Create** and choose **Import component**.

   Choose this option to import a component, a section layout, or a content layout.
4. If you uploaded the component or layout package, navigate to the folder that contains the component or layout and open the folder. If you haven't uploaded the package yet, go to the folder where you want to upload the component or layout or create a new folder. Click **Upload**, then find the component or layout package and click **Open**.
5. Click the checkbox next to the component or layout file name and click **OK**. A new component or layout is created and added to the component list. If the component or layout name or ID already exists, you're prompted to resolve the conflicts. You may need to create a new component or layout or you can overwrite the existing component or layout with the imported version.

14 Editing Sites

Let's get to know the editor a little and see what you can do with it.

The Basics

- Quick tour of the site editor
- What's the difference between preview and edit?
- What's the difference between publish and save?
- What are some editing tips and tricks?
- How do I work with styles and formatting?
- How do I work with tables?
- How do I upload files?

Managing Site Updates

- What is an update?
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Working with Site Pages

- How do I navigate to a page?
- How do I view pages?
- How do I add a page?
- How do I add a linked page?
- How do I move a page?
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- How do I delete a page?

Using Page Design

- How do I change the background?
- How do I switch themes?

Working with Site Settings

- How do I set search engine properties?
- How do I customize site settings?
- How do I add sitemaps, robot files, and favorite icons?
- How do I enable Cobrowse to work with a site?

Adding Content to a Page

- What is a site component?
- What is a section layout?
- How do I add content to a page?
- How do I work with content items on a site?
- What are triggers and actions?
- How do I use triggers and actions?

The Basics

Let’s get to know the page editor a little and see what you can do with it.

- Quick tour of the site editor
- What’s the difference between preview and edit?
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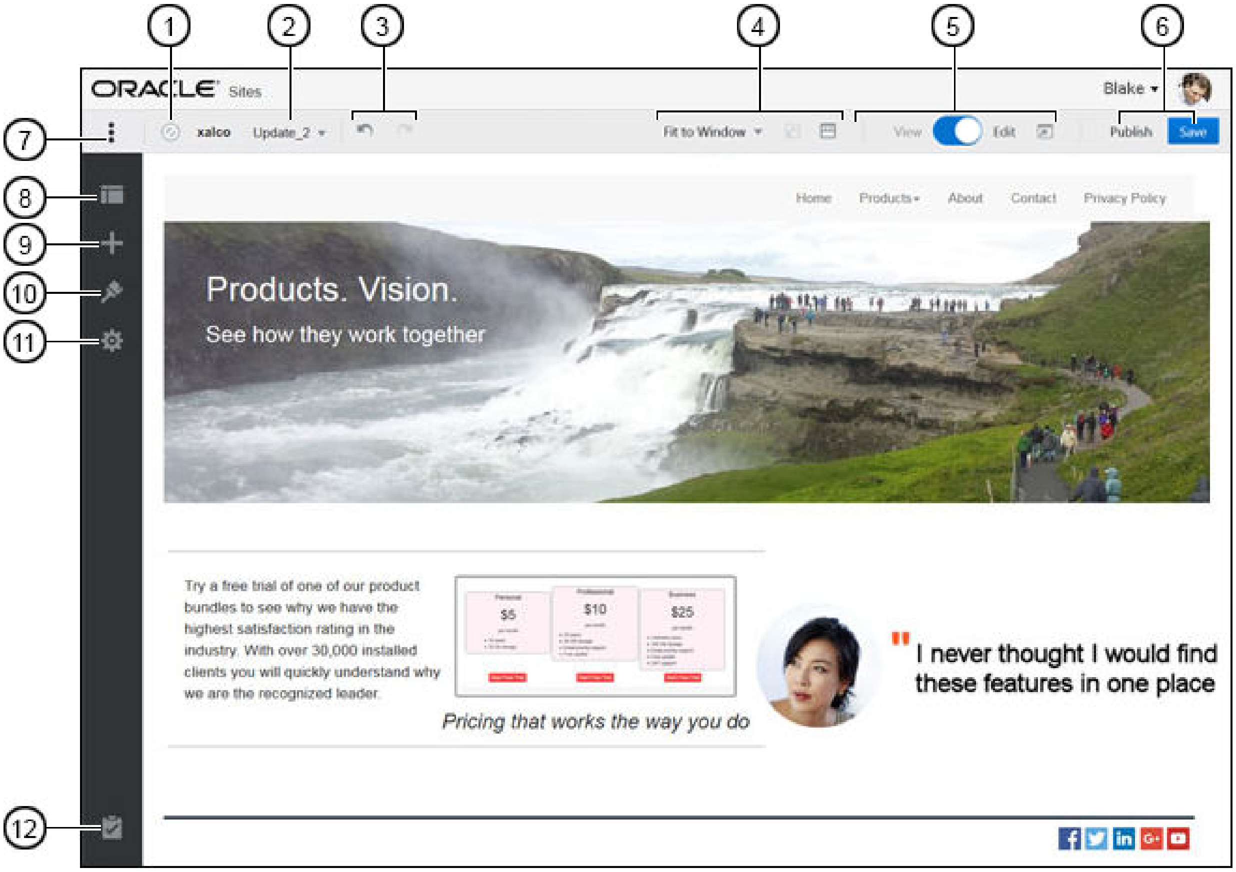
- What are some editing tips and tricks?
- How do I work with styles and formatting?
- How do I work with tables?
- How do I upload files?

Quick tour of the site editor

When you edit an existing update or create an update for a site, the update opens in the site editor. Take a minute to become familiar with the layout of the page and the tools available.



Here are a few things to note:

- Check the **status (1)** to see if the current site is currently online or offline .
- Check the **update (2)** for the name of the update you're currently working on. If there's more than one update available, you can switch to a different update.
- Use **Undo (3)** to reverse the last edit or change you made in the editor. Use **Redo (3)** to reapply the most recent change you reversed using undo. You can use undo multiple times to reverse a series of changes in the current update including changes in content, style, and page organization.
- Use the **preview options (4)** to see how the content will look under different circumstances. You can navigate to any page and see the base site with the changes from the current update applied. Click **Fit to Window** and choose a dimension to view the page as it will appear on a device with that screen size.

  Several sizes are given and you can create your own device size. Click to see markings. Click an interval on the ruler to quickly see how the site appears at different sizes. You can also select to see how a site will appear on a mobile device depending on orientation. Themes with a responsive design automatically arrange page content for the best use on the selected screen size.

- Use the **switch (5)** at the top of the page to alternate between preview and edit . Click to preview the site.
- Use the available **options (6)** to process your changes. Click **Publish** to merge your changes directly to the online or offline **site**, or click **Save** to save your changes to the **update**.
- Click the **sidebar icon (7)** to show (or hide) the tools in the sidebar.

> **Note:**
>
> You must set to **Edit** before you can use the tools in the sidebar.

- Click an **icon (8–12**) in the sidebar to manage pages, add components, change the theme, and more.

Callout	Click...	To...
8		Edit and add pages, manage nested page structures, reorganize pages, and change page settings.
9		Add components, such as titles, paragraphs, galleries, images, dividers, and buttons, or spice up your pages with components.
10		Select a different theme for the site or change the background for a page or slot.
11		Add keywords for search engine optimization (SEO).
12		Return to the home page to manage your sites.

What's the difference between preview and edit?

When you open a site in the editor, you can choose to edit or to preview pages.

Use the switch at the top of the page to alternate between preview and edit :

- **Preview**: Shows the page as it will appear to your site visitors, without slot and component borders and other visual aids used while editing. You can use the links on the pages to move around the site, including links in navigation menus, links in text, and so on. Links to other sites open in a new window for security purposes. Links to pages in the current site open in the same window or a new window depending on link target you specify.

  To preview the current update applied to the base site in a separate browser window, click .
- **Edit**: Shows the page with slot and component borders and other visual aids to help you place and modify content.

To access the sidebar with editing and navigation options, the switch must be in the edit position.

What's the difference between publish and save?

Each time you view or edit a site in the editor, you use an update. Any changes you make in the editor become part of that update when you save the changes.

When you're done making changes in an update, save your changes in one of the following ways:

- Click **Save** to save your changes to the current update. You can continue working in the current update or return to the update later.
- Click **Publish** to apply your changes directly to the base site.

When you publish the changes in the current update, the changes are made to the base site and the update is deleted. You must use an active update each time you view or edit a site in the editor, so you're returned to the site list where you can create a new update.

What are some editing tips and tricks?

Here are some things about the editor that will help you get started.

- Hiding or Showing the Sidebar
- Getting Around
- Drag and Drop Editing
- Components
- Editable Layout Content
- Styles and Formatting
- Undoing Your Changes

Hiding or Showing the Sidebar

Click to show options for managing and editing pages and page content.

Set to **Edit** to access the sidebar. Click to hide the sidebar and increase your viewing area when you preview a page.

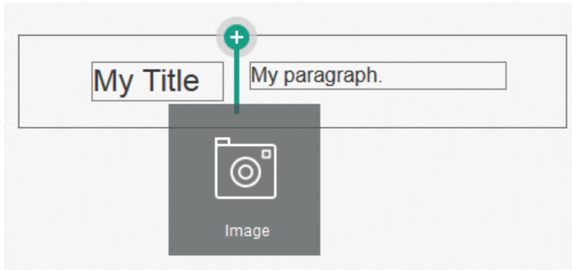
Getting Around

To select another page using the site tree, click in the sidebar. You can also use the site navigation or links on the pages themselves.

Any changes you make on a page are stored when you switch to another page. You can also click **Save** to save changes in the current update.

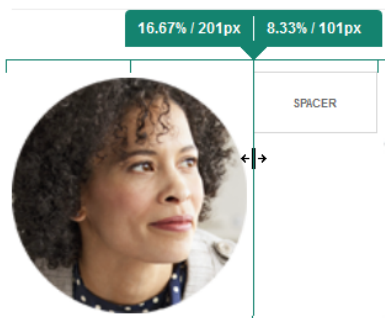
Drag and Drop Editing

To add a component from the sidebar, or to move a component on the page, click, drag, and drop the item to the location on the page. When you drag an item to the page, the boundaries of available slots and any existing items are shown. A placement bar indicates where the new content can go (above, below, left, right):



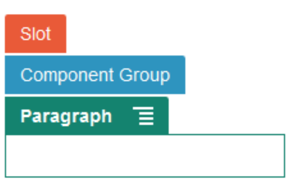
You can have multiple items in a slot and move items on the page just by dragging them to a new location. You can also adjust the relative width of two components in a slot by clicking and dragging the boundary between the two components. The component snaps to the next grid line indicated in the “ruler” displayed above the components.

The size of each component is displayed both in pixels and as a percent of the available space in the slot. To adjust widths to values other that those defined by the grid, press and hold the **Ctrl** key while you click and drag the component boundary.

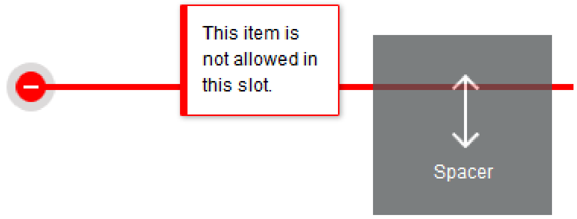


Components

After you place a component on the page, you can adjust the alignment, spacing, and other properties by selecting the item, clicking the item’s menu icon, and choosing **Settings**. If you click the component name instead of the menu icon, you can see and select the menu icon for the slot and component group (if the current component is part of a component group). If you select one of the other tabs, you can see the menu icon and set properties for that element:

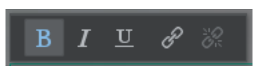


Theme designers can specify which components are included with the theme, so some components available with one site may not be available with another. Theme designers can also specify which components are allowed in a given slot in a given page layout. If a component isn’t allowed in a particular slot, the placement bar changes color and symbol (minus)  and a message similar to the following is displayed:

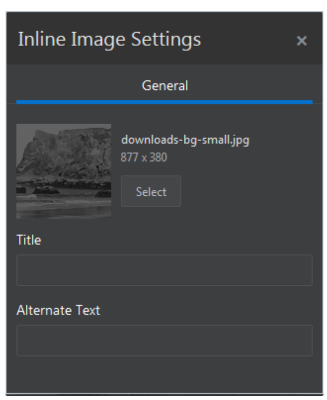


Editable Layout Content

Theme designers can add “built-in” content to page layouts, such as copyright notices, that can’t be changed in the editor. Theme designers can also designate simple text and image content as editable, including digital assets. This allows a contributor to change the text or image content, but not alter the location or other layout attributes. Editable text elements have a menu with options for specifying bold, italic, and underline text and for changing or removing a link:



Editable graphic elements have a settings icon  and panel where you can specify an image, title, and alternate text.

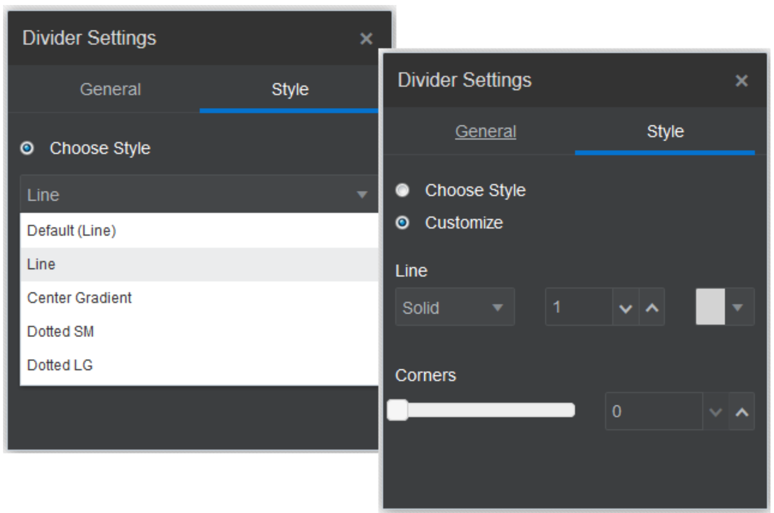


The frame that encloses the text or image adjusts to accommodate the length of the text or the size of the image.

> **Note:**
>
> The changes you make apply to the current page only. The original content is stored with the layout in the theme and is the default when the layout is first applied to a page.

Styles and Formatting

Most components have one or more base styles defined by the theme that specify aspects of the component's appearance. You can easily switch styles or override a style. To choose between available styles, open the component's Settings panel, click the **Style** tab, click **Choose Style**, and choose a style from the menu. To specify your own values for the properties specified in the style definition, click **Customize** and specify the formatting options.



Undoing Your Changes

Use  to reverse the last edit or change you made in the editor. You can use undo multiple times to reverse a series of changes.

Use  to reapply the most recent change you reversed using undo. You can use redo multiple times if you have used undo multiple times in succession.

You can undo changes in content, style, and page organization in the current update. Some actions aren't included in the undo chain:

- If you switch to a different update, the undo chain is reset and you can't undo the changes made in the update you worked on earlier. Within an update, you can undo changes even after you save them.
- If you change views in the editor, such as switching pages or changing the size for a given page, you must manually reverse those types of changes.
- If you edit text components, such as titles or paragraphs, the text editor has its own undo chain. When you leave the text editor, you can no longer undo those changes.

How do I work with styles and formatting?

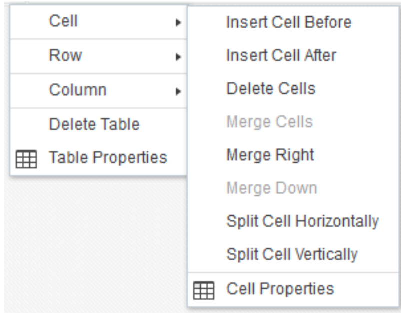
Most components have one or more base styles defined by the theme that specify aspects of the component's appearance. You can easily switch styles or override a style with options that you choose.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. To set the base style for a component, click the component's menu icon and choose **Settings**. Click the **Style** tab.
   - To use a style from the site's theme, click **Choose Style** and choose the style from the menu. Styles are defined for individual components, so the list of styles may vary. For example, the styling for an image is different from that for a paragraph.
   - To specify your own base formatting options, click **Customize** and specify the formatting options.
3. To copy and paste the base style to one or more similar components, click the component's menu icon and choose **Copy *component* Style**. Click a similar component's menu icon and choose **Paste *component* Style**.
4. To format the text within a title or paragraph component, click in a text component. A tool bar with formatting options is shown. Select the text that you want to format, then select any of the options, such as font, color, or alignment. The changes you make are applied immediately. To remove the formatting, select the text and click . Formatting changes are applied over the base style. If you change the base style, the overrides stay in place.

How do I work with tables?

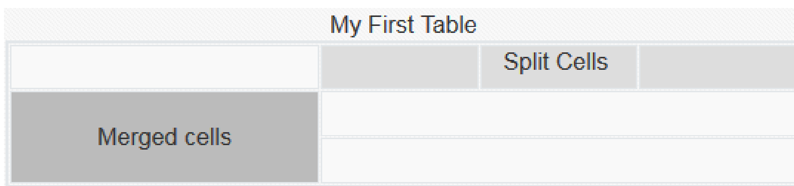
Within a paragraph component, you can include tables that you create or that you paste from an existing HTML source.

1. Go to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page or click in an existing paragraph component. See How do I add content to a page?
3. To add a table from another HTML page, just click and drag to select the table, then copy and paste it into the paragraph component. To create a new table at the current cursor position, click . Choose the number of rows, column, the width, and other formatting options. You can add an optional **Caption** centered above the table and an optional **Summary**, which gives additional context for assistive technologies such as automated screen readers.
4. Click **OK** when done to close the window. To change these table settings later, right-click in the table and choose **Table Properties**. To delete the table, right-click in the table and choose **Delete Table**.
5. To add, remove, or modify specific rows, columns, or cells, right-click in the row, column, or cell a choose from the menu of options. For example:



> **Note:**
>
> You can change cell properties for only one cell at a time.

6. You can merge and split cells to create complex table layouts. For example:



   - To split a cell into two cells, right-click in the cell, choose **Cell**, and then choose **Split Cell Horizontally** or **Split Cell Vertically**.
   - To merge two horizontal cells, right-click in the left cell, choose **Cell,** and then choose **Merge Right**.
   - To merge two vertical cells, right-click in the top cell, choose **Cell,** and then choose **Merge Down**.

7. Use the general formatting menu options to changes the format and alignment of text within cells.

How do I upload files?

You can upload images and documents for use with your site at any time using the Oracle Content and Experience Cloud interface. You can also upload files from within the site editor when working with background images, and with image, gallery, and document components.

When you use image and document files with sites, you can use images stored with the site or in another location you can access. You can also use images that were shared with you or that you upload from a local or network file location.

Uploading Files

To upload one or more files from a local or network location:

1. On the home page, click then **Content**. Click **Documents**.

2. Go to the location where you want to store the file or click to add a new folder in the current location.
3. Click .
4. Locate and select one or more files and then click **Open**.

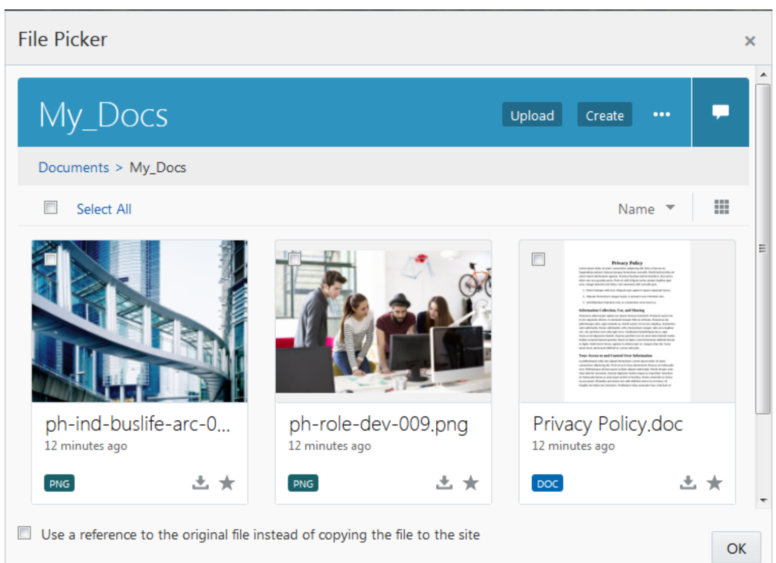
Uploading Files within the Editor

When working with background images or with components such as documents or images, you can upload files directly if the file you want to use isn't in an Oracle Content and Experience Cloud location.

For example, to upload one or more files from a local or network location to use with a gallery component:

1. To add images to a gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.
2. Click **Add Images**.

   The File Picker window displays:



3. Go to the location where you want to store the file or click to add a new folder in the current location.
4. Click .
5. Locate and select one or more files and then click **Open**.
6. Select one or more images in the repository and click **OK**.

> **Note:**
>
> The window displays all available files. Choose the file type that's appropriate for the context. For example, if you're choosing an image file, select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG). To link to the file, select **Use a reference to the original file instead of copying the file to the site**. If you don't select this option, a copy of the file is stored with the site and referenced from the site.

Managing Site Updates

What are updates and how do I create and edit them?

- What is an update?
- How do I use an update?
- How do I publish an update?

For information about using the editor, see Adding Content to a Page.

What is an update?

An update is a named collection of changes to the current base site. The changes remain in the update until you publish them and permanently update the base site.

Each time you view or edit a site in the editor, you use an update. Any changes you make in the editor are part of that update. You can have one or more updates and you can continue to add changes to an update over time. Updates give you flexibility with how you manage edits to a site. For example, you can have several people working on their own updates for different parts of the site. You can review and modify individual updates, and when you're ready, you can publish updates to the base site.

You can organize updates in several ways:

- Page-specific changes in an update named for the page
- Changes made by a specific user in an update with the user's name
- Changes made on a given day or for a particular project milestone

> **Note:**
>
> An update shows the changes in that update against the base site. Although it's easy to switch between available updates within the editor, you can view only one update at a time. If there are multiple updates to a given page, you might not know if you have multiple changes to the same content area. To prevent conflicting changes on a page, target individual updates to specific pages or areas of the site.

When you publish the changes in the current update, the changes are made to the base site and the update is deleted.

- For an *offline* site, updates are merged with the base site. Offline sites are visible only in the editor.

- For an *online* site, updates are merged with the base site and the online site is updated immediately. Online sites are visible to anyone with access to the site. You must be the site owner or have the Manager role to publish changes to an online site. Be careful when publishing an update to an online site. Your changes are immediately visible to anyone with access to the site.

With an update, the process is linear:

- The original site (base site) exists. Let's call it Version 1.
- You create an update. When you merge the update (either with Apply or Publish), the update is permanently written to the existing site. You now have a new version (Version 2) of your base site.
- If you create and merge another update, then the update is permanently written to the existing site. You now have a new version (Version 3) of your base site.

With updates, remember that:

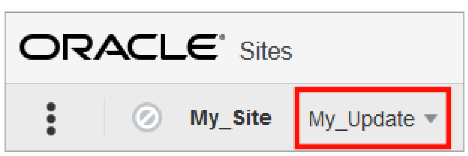
Current Base Site + A Merged Update = New Version of the Base Site

How do I use an update?

Each time you view or edit a site in the editor, you use an update. Any changes you make in the editor are part of that update.

To create and use an update:

1. On the home page, right-click the site in the list and choose **Edit**.
2. If this is the first update for a site, enter a name for the update and an optional description, then click **Create**. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen. To use an existing update, select the update from the list and click .
3. The name of the site and current update are displayed in the top bar in the editor. If you have multiple updates, you can switch updates by selecting a different update from the list of updates.



4. To make changes in the current update, make sure that is set to Edit.
5. Add and change page content as necessary. Use different display size options to see how the page will look on different devices.
6. When you're done editing, click **Save**. When you're ready to merge your changes with the base site, you can publish the update.

How do I publish an update?

When you publish the changes in the current update, the changes are made to the base site and the update is deleted.

- For an *offline* site, updates are merged with the base site. Offline sites are visible only within the editor.
- For an *online* site, updates are merged with the base site and then the online site is updated immediately. Online sites are visible to anyone with access to the site. You must be the site owner or have the manager role to publish changes to an online site.

> **Note:**
>
> Be careful when publishing an update to an online site. Your changes are immediately visible to anyone with access to the site.

To publish an update:

1. To preview the changes in the current update, make sure the switch at the top of the page is set to preview .
2. When you're ready to make your changes permanent, click **Publish**. The changes in the current update are made to the base site and the update is deleted. You must use an active update each time you view or edit a site in the editor, so you're returned to the site list where you can create a new update.

Working with Site Pages

Let's create a page, choose a layout, and decide where the page goes in the site.

- How do I navigate to a page?
- How do I view pages?
- How do I add a page?
- How do I add a linked page?
- How do I move a page?
- How do I change the page layout?
- How do I delete a page?

How do I navigate to a page?

To view and navigate the hierarchy of pages:

1. Open a site for editing. See How do I edit a page?
2. Make sure that is set to Edit.
3. Click to show options for managing and editing pages and page content.

4. Click to list the first level of pages.
5. Click a page to view the page. When you want to go to the top level page, click the top page heading.

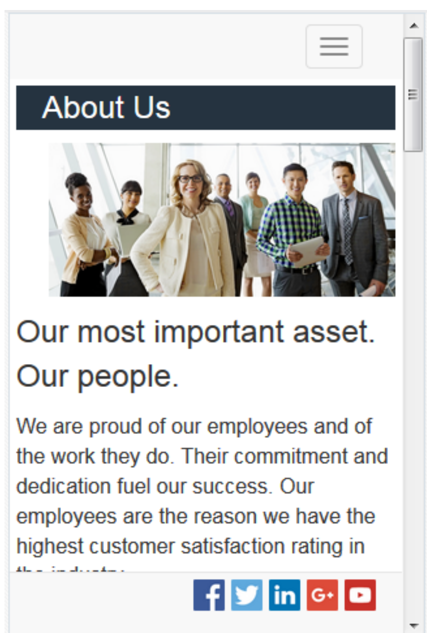
   Pages with an arrow (>) have a nested layer of pages. Click the page to show the nested pages.
6. To view or change settings for a particular page, click for that page.

How do I view pages?

To view the pages in a site, open the site in the editor and use the different preview, size, and orientation options.

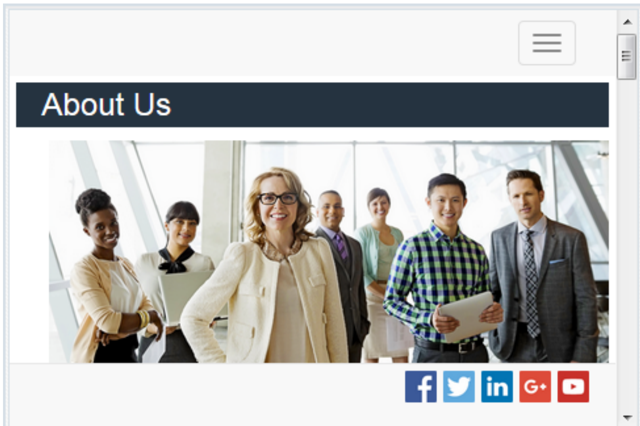
To change how you view pages while using the editor:

1. Open a site for editing. See How do I edit a page?
2. Navigate to a page. See How do I navigate to a page?
3. To preview the page in the editor, make sure that is set to Preview. This shows the page as it appears to your site visitors, without the visual aids used while editing.
4. To preview the current update applied to the base site in a separate browser window, click .
5. To preview the page as it appears on a device with a particular screen size, click **Fit to Screen** in the top menu bar and choose a set of screen dimensions from the list. Themes with a responsive design automatically arrange the page content for the best use on the selected screen size.



6. To create a custom size, click **Fit to Window** and choose **Create a device preset...**. Complete the necessary fields. To delete a custom size, click next to the size. You can also activate the ruler and select any interval on the ruler to quickly see different sizes.

7. To alternate the page orientation between portrait and landscape, click .



How do I add a page?

The pages in a site are structured in a folder-like hierarchy, or *site tree*. You can add a page, define settings for the page, and decide where the page goes in the site.

You can choose to add a page or add a link to an external page.

- **Web Page**: The page and content reside with the site. You name the page and define its content, specify where the page goes in the site, and specify how the page behaves in the context of the current site.
- **External Link**: The page is referenced from another location specified by a URL. You can name the page, specify where goes in the site, and specify how the page behaves in the context of the current site. Because you're using a page from a live site, you can't change the content of a linked page.

To add a web page to the site:

1. Open a site for editing. See How do I edit a page?
2. Go to the page at the level in the site tree where you want to add the page. See How do I navigate to a page?

   Pages are added at the current level, but you can easily move them to another location in the site tree. See How do I move a page?
3. Click **Add Page**.

   "New Page" is added to the bottom of the site tree and you're prompted to name the page and specify other settings.
4. Select **Web page** as the page type.

   Use this option if you want to manage the content on the page instead of reusing a page from another site.

5. Give the page a name. You can use letters, numbers, underscores (_), and hyphens (-).

   Don’t use the following names for templates, themes, components, sites, or site pages:

   - authsite
   - content
   - pages
   - scstemplate_*
   - _comps
   - _components
   - _compsdelivery
   - _idcservice
   - _sitescloud
   - _sitesclouddelivery
   - _themes
   - _themesdelivery

   Although you can use the following names for site pages, don’t use them for templates, themes, components, or sites:

   - documents
   - sites
6. Specify the page URL. By default, the page name is used for the page URL. Spaces are automatically replaced with hyphens. To use a URL other than the default, click **Override** and add the file name used in the URL. You can use letters, numbers, underscores (_), and hyphens (-). Be sure to include a file extension. The default file extension is .html.
7. Choose a page layout. This defines the general structure of the page, but not the content. A layout contains one or more named *slots* where you can put content. The number and type of page layouts depends on the theme associated with your site.
8. Specify a page title. It doesn’t show up on the page itself, but in the browser title bar or browser tab when the page displays. To add a title on the page, use the editor to add a title component.
9. Add an optional description. This description doesn’t show up on the page , but lets you add information about the page for other contributors or for your own use.
10. Specify optional keywords separated by commas to help search engines identify the content of the page. Keywords are useful to identify terms or concepts that don’t appear in the text of the page or that appear in images. The keywords don’t appear on the page, but search engines use them to locate and identify your site. Good descriptions, keywords, and synonyms can increase traffic to your website.
11. Add an optional page header scripting or tags for analytics or tracking.

> **Note:**
>
> You must validate any code you use in the header or footer to make sure it works properly and doesn't introduce any security risks to your site.

12. Add an optional page footer scripting or tags for analytics or tracking. By default, the footer contains the text for pop-ups displayed regarding the use of cookies on the site with a link to the Privacy Policy. If you're a developer, you can edit the text that's displayed.

> **Note:**
>
> You must validate any code you use in the header or footer to make sure it works properly and doesn't introduce any security risks to your site.

13. Optional: You can use any of the available page options:
    - **Error page**: If an error prevents a requested page from displaying, show this page instead of the default error page.
    - **Hide page from navigation**: Don't include the page in the automatically generated navigation for the site.
    - **Detail Page**: Use this page to display detail information for a content item selected on another page. Structured content is available for enterprise users only. By default, when you select this option, **Hide page from navigation** is also selected. You can deselect the option if you do want the detail page to be included in the navigation.

      When structured content items are configured to use the detail page and a user clicks the link for more details on a structured content item, the detail page is displayed with detailed information for the content item.
    - **Search Page**: Use this page to display results from a search. You can select this page in the Link settings of a Content Search component. See How do I use a content search component?
14. Optional: Select a search engine optimization (SEO) option:
    - **Hide page from search engines**: Notify search engines not to index the content of the page so it doesn't show up in search results.
    - **Hide page links from search engines**: Notify search engines not to follow links on the page and consequently don't index the link destinations.
    - **Hide page descriptions from search engines**: Notify search engines not to include the description (specified above) after the page in the search results.
    - **Do not provide page image in search results**: Notify search engines not to include an image of the cached page in the web search results.
15. Optional: select if this page will have a Cobrowse button to use with browsing sessions. A cobrowse session uses Oracle Cobrowse Cloud Service to manage a screen sharing experience with a site visitor. See How do I use Cobrowse on a page? for details.
16. Click Close. To save all pending changes in the current update, click **Save**.

How do I add a linked page?

The pages in a site are structured in a folder-like hierarchy, or *site tree*. You can add a page, define settings for the page, and decide where the page goes in the site.

You can choose to add a page or to add a link to an external page.

- **Web Page**: The page and content reside with the site. You name the page and define its content, specify where the page goes in the site, and specify how the page behaves in the context of the current site.
- **External Link**: The page is referenced from another location specified by a URL. You can name the page, specify where goes in the site, and specify how the page behaves in the context of the current site. Because you're using a page from a live site, you can't change the content of a linked page.

To add an external link page to the site:

1. Open a site for editing. See How do I edit a page?
2. Navigate to the page at the level in the site tree where you want to add the page. See How do I navigate to a page?

   Pages are added at the current level, but you can easily move them to another location in the site tree. See How do I move a page?
3. Click **Add Page**.

   "New Page" is added to the bottom of the site tree and you're prompted to name the page and specify other settings.
4. Select **External link** as the page type.

   The set of page properties changes to reflect the options for this type of page.
5. Give the page a name. You can use letters, numbers, underscores (_), and hyphens (-).

   The name is used in the site tree to identify the page. Spaces are automatically replaced with hyphens.
6. Specify the full URL to the page. For example:

   ```
   https://www.example.com/sharedpage.htm
   ```
7. If you want the page to open in a new browser window or tab, select **Open link in a new window**.

   If you don't select this option, the page opens in the current window, replacing your site page and navigation.
8. Optionally, select any of the available options:
   - **Error page**: If an error prevents a requested page from displaying, show this page instead of the default error page provided with the site.
   - **Hide page from navigation**: Don't include the page in the automatically generated navigation for the site.
   - **Hide from search engines**: Notify search engines not to index the content of the page so it doesn't show up in search results.
9. Close the settings page by clicking Close. To save all pending changes in the current update, click **Save**.

In the site tree, a page that links to an external URL has before the page name.

How do I move a page?

You can drag and drop pages to another location in the current level of the site tree, or cut and paste a page to another level.

There's always a top page in the hierarchy, the "home" page for your site, and all other pages are listed beneath it. You can drag and drop pages at a given level to change their order. You can also cut and paste pages to another location in the hierarchy.

Pages can have nested pages. If you move a page with nested pages, the nested pages are also moved and remain nested beneath the moved page. If the theme you use includes automated navigation, changing the order of pages also changes the order in which they're listed in the navigation menus.

To move a page to a different location in the site tree:

1. Open a site for editing. See How do I edit a page?
2. Go to the page you want to move. See How do I navigate to a page?
3. To move a page to a different position in the current level of the site tree, click and drag the page name to a different location in the list of pages, then drop it.
4. To move a page to a different level of the site tree, click the page you want to move and click for that page. Click to cut the page from its current location or to leave a copy of the page in the current location. Go to the level where you want the page and click . If you select a page at that level, the pasted page will be nested under it. Click to paste the page to the current location. To reorder the pages, drag and drop a page to another location in the current level of the site tree.

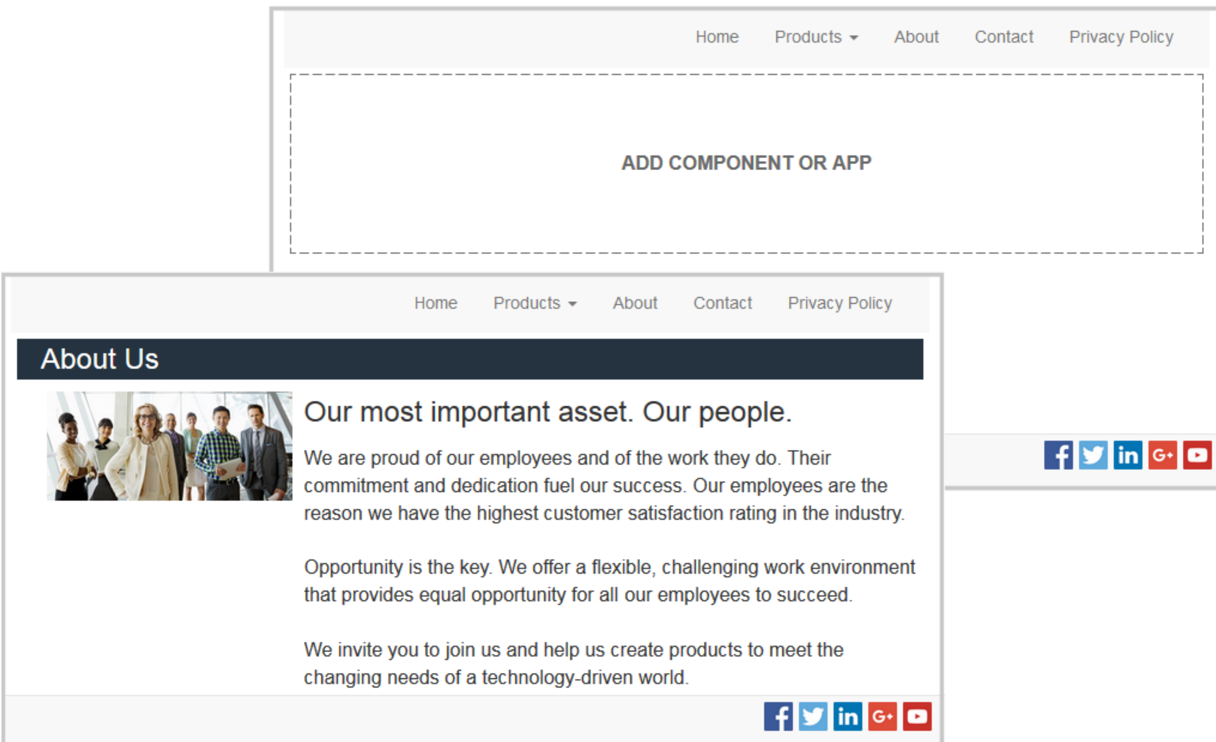
How do I change the page layout?

A layout defines how content is arranged on the page. Different layouts can contain a different number of named *slots*, which is a region spanning the width of the page. A slot can contain one or more types of content.

Every theme has several page layouts. When you add a page to a site, you select a layout to use for that page. Each layout has slots where you can drag and drop content. What content goes into these slots is up to you. It can be anything from titles, text, and dividers to multimedia, galleries, and social media. You can arrange the content in a slot, but you can't change the number or arrangement of slots on the page. To do that, you have to use a new page layout.

> **Note:**
>
> You can swap one layout for another. Be careful though. If you choose a layout with fewer or differently named slots, existing content in other slots won't display in the new layout. The content isn't deleted, it just can't be displayed unless the layout you choose has a slot with the same name.

The following illustration shows a sample layout for a page. You can see the empty slot in the page layout and the completed page with title, image, and text added to the slot.



To select a different layout for a page:

1. Open a site for editing. See How do I edit a page?
2. Navigate to the page and click . See How do I navigate to a page?
3. Go to the Page Layout field and select a different layout from the menu. The number and type of page layouts depends on the theme associated with your site.
4. Click **Close** to close the page. To save all pending changes in the current update, click **Save**.

How do I delete a page?

You can delete pages as part of an update.

A deleted page is recorded as part of an update when you click **Save**. The page isn't deleted from the base site until you publish the update. Anyone with the Contributor or Manager roles can delete a page.

> **Note:**
>
> When you publish an update that deletes a page, the page is permanently deleted and can't be recovered. If managing page additions or deletions is a concern, you can isolate those actions using dedicated updates when adding or deleting pages from a site.

To delete a page from the site:

1. Open a site for editing. See How do I edit a page?
2. Navigate to the page that you want to delete and click . See How do I navigate to a page?
3. Click **OK** to confirm the deletion. Click **Save** to save all pending changes in the current update.

Using Page Design

What if I want to change the theme I use, or the background for a page?

- How do I change the background?
- How do I switch themes?

How do I change the background?

You can specify the background color and image for the page, for individual slots on the page, and for section layouts within a slot. A slot is a region that spans the width of the page and can contain one or more types of content. The background you specify for a slot applies to the entire slot and all the components in the slot.

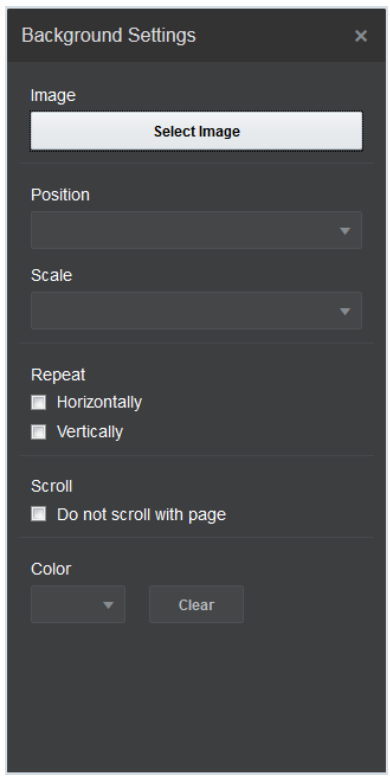
Backgrounds layer on top of each other. If you specify a background for a slot, it sits “on top” of the background specified for the page. For most images and colors, the upper layer effectively overrides the lower layer. If you use a degree of transparency either in a background color or in images, the colors in lower layers can show through or blend with the colors used in upper layers.
Some components, like paragraphs and titles, can provide a background color as part of a pre-defined style or as a customized style. If you specify a background color for a component, it also layers on top of any section layout, slot, or page background. See How do I work with styles and formatting?.

The background options are similar for pages, slots, and section layouts, though you access them in slightly differently ways:

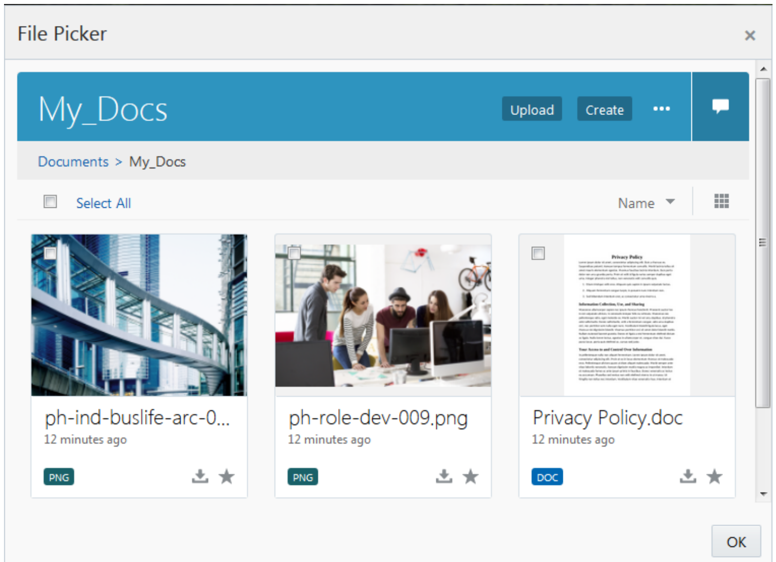
1. Open a site for editing. See How do I edit a page?

2. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
3. To change the background for a page or slot:
   a. Click in the sidebar and then click .
   b. To specify the background for the entire page, click **Complete Page** and click . To specify the background for a slot on the page, select the slot and click .
4. To change the background for a section layout:
   a. Click the menu icon for the section layout and choose **Settings**.
   b. Click **Background**.

      The background options are the same for pages, slots, and section layouts:

5. To use an image for the background, click **Select Image**.



You can use images from any location you can access. You can also use images that were shared with you or that you uploaded from a local or network file location. See How do I upload files?

6. Select an image and click **OK**.

> **Note:**
>
> The window displays all available files. Choose the file type appropriate for the context. For example, if you're choosing an image file, select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

7. To adjust the image settings:
   - Use **Position** to place the image on the page or in the slot.
   - Select a **Scale** option to adjust the presentation of the image:
     – **Fit**: The image is scaled so the entire image fits in the available space without distorting the image.
     – **Stretch**: The larger of the two dimensions (width or height) is scaled to fit the available space and the smaller dimension is stretched to fill the available space.
     – **Fit**: The image is scaled so the entire image fits in the available space without distorting the image.
     – **None**: The image is used at its full pixel resolution and is cropped uniformly if it doesn't fit in the available space.
   - Select a **Repeat** option to tile an image that's too small to fill the available space. This option doesn't apply if you select **Stretch** as the **Scale** option.
   - Select **Do not scroll with page** to keep the image stationary while the user scrolls the page.
8. To select a color for the background, choose a color from the **Color** menu or click **More** to select a color from the complete range of colors.

- Click in the spectrum bar on the right to choose a color and to display variations of the color in the color range display. The display shows the selected color in the upper right corner and shades of the selected color with increasing amounts of white toward the left and increasing amounts of black toward the bottom.
- To select a variation of the color, click within the color range display or click and drag the selection point to a new color position. The current color box and the 6-digit color code show the selected color.
- To adjust the transparency (alpha channel), click and drag the transparency slider to the left to increase transparency. An alpha value of 0% makes the color transparent, allowing color and content from lower layers to show through completely. An alpha value of 100% makes the color completely opaque, blocking out all color and content from lower layers. Other values allow images and colors from lower layers to show through and their colors to blend with those of upper layers to different degrees.
- To apply the current color selection, click **Choose**.

How do I switch themes?

You can change the theme used for the site as part of an update.

The change to the theme is recorded as part of an update when you click **Save**. The theme change isn't applied to the site until you publish the update.

> **Note:**
>
> Not all themes are compatible with each other. Different themes can contain different navigation, style name, or page layout information. For example, if you choose a theme with different layout names, existing pages may use layouts that aren't available in the theme. Those pages appear blank. The page content isn't deleted, it just can't be displayed unless the theme you choose has a layout and slots with the same names. If you choose an incompatible theme, you can change the theme back to the original theme to restore the page content.
> Be certain you switch to a compatible theme. If you aren't sure, check with the theme developer.

To change the theme used for the site:

1. Open a site for editing. See How do I edit a page?
2. Click in the sidebar and then click .
3. Select a theme from the list of available themes and click **OK**. The theme is applied in the current update. To save all pending changes in the current update, click **Save**.

Working with Site Settings

Use site settings to specify information that applies to all pages in the site, such as headers and footers, and to specify search engine optimization (SEO) values.

- How do I set search engine properties?
- How do I customize site settings?
- How do I add sitemaps, robot files, and favorite icons?
- How do I enable Cobrowse to work with a site?

How do I set search engine properties?

You can provide keywords and text to help search engines identify the content of the site.

You can define search engine optimization (SEO) settings at the site level and at the page level. The site-level settings augment or override similar settings for individual pages as described in the table below.

Option	Site Level	Page Level
Description or Page Description	Provides general information about the site that isn’t included in the site itself. The site description is included on each page in the site This description is also used as the page-level description for the home page only if there’s no value set using **Page Settings** for the home page.	Provides general information about the page that isn’t included in the page itself. The page description is in addition to the site description included with every page in the site.
Keywords	Identifies terms or concepts that apply to all pages on the site. These values are added (appended) to the keywords specified for individual pages.	Identifies terms or concepts that apply to the individual page. Page keywords may be useful to identify terms or concepts that don’t appear in the text of the page or that appear in images.
Header or Page Header	Add scripting or tags for analytics or tracking to your site. The site header content is included on each page in the site.	Add scripting or tags for analytics or tracking to your site. The page header content is in addition to the site header content included on each page.
Footer or Page Footer	Add scripting or tags for analytics or tracking to your site. The site footer content is included on each page in the site.	Add scripting or tags for analytics or tracking to your site. The page footer content is in addition to the site footer content included on each page.
Search Exclusions:	If you specify the following options at the site level, the setting applies to all pages and overrides the setting on the individual pages. If you don’t select this option at the site level, then only those pages that individually specify the option use the option.	If you specify the following options at the page level, the setting applies only to the page. The same setting set at the site level overrides the individual page setting.
Hide page from search engines	If selected, add the NOINDEX meta tag to every page so that search engines won’t index the content of any page on the site. In this case, the site and all its pages won’t shown up in the web search results.	If selected, add the NOINDEX meta tag to the current page so that search engines won’t index the content of the page. In this case, the individual page won’t shown up in the web search results.
Hide page links from search engines	If selected, add the NOFOLLOW meta tag to every page so that search engines won’t follow links (and then index the destination) on any page on the site.	If selected, add the NOFOLLOW meta tag to the current page so that search engines won’t follow links (and then index the destination) on the page.
Hide page descriptions from search engines	If selected, add the NOSNIPPET meta tag to every page so that search engines won’t include the description (specified above) after the page in the search results.	If selected, add the NOSNIPPET meta tag to the current page so that search engines won’t include the page description (specified above) after the page in the search results.

Option	Site Level	Page Level
Do not provide page image in search results	If selected, add the NOARCHIVE meta tag to every page so that search engines won't include an image of the cached page in the web search results.	If selected, add the NOARCHIVE meta tag to the current page so that search engines won't include an image of the cached page in the web search results.

To change search engine optimization (SEO) settings:

1. Open a site for editing. See How do I edit a page?
2. Click in the sidebar and then click .
3. Provide an optional description for the site. The site description is included on each page in the site.

   This description is also used as the page-level description for the home page only if there's no value set using **Page Settings** for the home page.
4. Optionally, specify keywords separated by commas to help search engines identify the content of the site.

   Site keywords identify terms or concepts that apply to all pages on the site. These values are added (appended) to the keywords specified using **Page Settings** for individual pages.
5. Optionally, add header scripting or tags for analytics or tracking to your site. The header content is included on each page in the site.

   Note:

   You must validate any code you use in the header or footer to make sure that it works properly and that it does not introduce any security risks to your site.
6. Optionally, add footer scripting or tags for analytics or tracking to your site. The footer content is included on each page in the site.

   Note:

   You must validate any code you use in the header or footer to make sure that it works properly and that it does not introduce any security risks to your site.
7. Optionally, select one or more of the following options to exclude information from appearing in search results:
   - **Hide page from search engines**: Notify search engines not to index the content of the site so it doesn't show up in search results.
   - **Hide page links from search engines**: Notify search engines not to follow links on the site and consequently not to index the link destinations.
   - **Hide page descriptions from search engines**: Notify search engines not to include the description (specified above) after the page in the search results.

- **Do not provide page image in search results**: Notify search engines not to include an image of the cached page in the web search results.

8. Close the settings page by clicking . To save all pending changes in the current update, click **Save**.

How do I customize site settings?

You can specify the site icons used with different browsers and platforms, or add a controller file to handle link behavior.

These settings are stored in an update until you publish the update. After publishing, the files are stored in the root folder of the theme so any sites using that theme will use these files.

To change the icons and link behavior for the entire site:

1. Open a site for editing. See How do I edit a page?
2. Click in the sidebar and then click .
3. In the Favorite Icons section, choose an image to use for the site when the site is minimized in a browser or on a different platform, such as a mobile device. The icon must be stored as a digital asset that you can access. Click **Select file to upload**, navigate to the icon and select it, then click **OK**.
4. In the Controller File section, you can add a file that alters the way browsers process link requests. You download the default controller file and edit it, or upload your own file. The file must be stored as a digital asset that you can access. Click **Select file to upload**, navigate to the file and select it, then click **OK**.
5. When you publish the update, the new files will also be published and put into use.

How do I add sitemaps, robot files, and favorite icons?

You can add custom files to help search engines navigate your site or to verify site ownership. You can also customize how favorites are shown.

A *sitemap* is an XML file that you can use to list URLs for a website and information about each URL, such as when it was last updated. A *robot file* is a text file you can create to instruct search engine robots how to index pages on your website. You can also upload an auxiliary file with additional information, such as site ownership verification. These kinds of files help search engines crawl through a site more efficiently.

These settings are stored in the root folder of a site and apply to this site only.

To add these types of files:

1. Open a site for editing. See How do I edit a page?
2. Click in the sidebar and then click .
3. In the Favorite Icons section, choose a file to use from those that are accessible for the site. Click **Select file to upload**, navigate to the icon and select it, then click **OK**. Customization is needed for the favorite icon to work all browsers:

- **For Chrome and Safari** there must be a reference to the favorite icon, including the site prefix, in the controller file, as shown in this example:

  ```
  <link rel="shortcut icon" href="/mySitePrefix/favicon.ico" />
  ```

  For Internet Explorer 11 and Firefox, a similar entry must be included in the page templates. However, a page template is part of a theme and it might be used in multiple sites. Therefore, it can't use a fixed site prefix and must use a token instead. See this example:

  ```
  <link rel="shortcut icon" href="<!--$SCS_SITE_PATH-->/favicon.ico" />
  ```

  The token will be swapped with the site prefix when the page is delivered.

Note that Internet Explorer and Firefox load a favorite icon from the controller and again from the page template. Therefore, the icon will flash unless the same one is referenced from both the controller and the page template. Chrome and Safari only load the icon that's referenced from the controller.

4. In a customized controller file, in addition to referencing favorite icons, you can also add OpenGraph tags or metadata tags for webmaster site verification, or for sharing the site on social media. You can download the default controller file and edit it, or upload your own file. Click **Select file to upload**, navigate to the file and select it, then click **OK**.

   For example, if your site contains a Facebook Share button, you may want to provide metadata that Facebook can use to show details about your site in Facebook, as in this example:

   ```
   <meta property="og:image" content="https://my.domain.com/fb-image.jpg"/>
   <meta property="og:title" content="My Site Title on FB!"/>
   <meta property="og:url" content="https://my.domain.com"/>
   <meta property="og:site_name" content="My Site Name on FB"/>
   ```

   You can add a Google webmaster verification tag, similar to this example:

   ```
   <meta name="google-site-verification"
   content="GCVURS9d2fP6jev5upt0Yt1AIp71C9D__ALqS8pg" />
   ```

5. When you publish the update, the new files will also be published and put into use.

How do I enable Cobrowse to work with a site?

The Cobrowse feature is a collaboration tool used with the Oracle Cobrowse Cloud Service.

Integration with Cobrowse Cloud Service must first be added as an accepted integration by the service administrator. See Integrating with Oracle Cobrowse Cloud Service in *Administering Oracle Content and Experience Cloud*.

After Oracle Cobrowse Cloud Service integration is enabled, the feature can be configured for the site and then added to specific site pages for use.

To enable cobrowsing on a site:

1. Open a site for editing. See How do I edit a page?
2. Click in the sidebar and then click .
3. In the Cobrowse section, select **Enable use of Oracle Cobrowse on this site**.

4. Enter the launcher script for the site. An Oracle Cobrowse Cloud Service administrator can access the Cobrowse administration console to obtain the appropriate launcher Javascript snippet. There are two different types of launchers.
   - Launch Point 1: a cobrowse button is automatically added on a page.
   - Launch Point 2: allows you to customize the button and the interface that is added on a page.
5. Click **Close**.

After Cobrowse is enabled for the site, you can add it to a page or customize how it is used on a page. See How do I use Cobrowse on a page? for details.

Using Cobrowse with Secure Sites and Site Builder Testing

Cobrowse has two modes: Instant (ICB) and Advanced (ACB). An extra configuration is needed to use Cobrowsing in ICB mode for a secured site or to preview a site still in development. This configuration is done in the Cobrowse Administration Console.

In the Custom Functions field, add a function to allow agents to see password-protected resources on a published secure site:

```
function () {
return {
passwordProtectedPatterns: [
"<PROTOCOL>://<DOMAIN>/authsite/*?*",
"<PROTOCOL>://<DOMAIN>/documents/*?*",
"<PROTOCOL>://<DOMAIN>/content/*?*#*"
]
}
}
```

To use this function for both published secure sites and to view/preview a site in development, add additional code:

```
function () {
return {
passwordProtectedPatterns: [
"<PROTOCOL>://<DOMAIN>/authsite/*?*",
"<PROTOCOL>://<DOMAIN>/documents/*?*",
"<PROTOCOL>://<DOMAIN>/content/*?*#*"
"<PROTOCOL>://<DOMAIN>/sites/*?*#*",
"<PROTOCOL>://<DOMAIN>/_themes/*?*",
"<PROTOCOL>://<DOMAIN>/_sitescloud/*?*",
"<PROTOCOL>://<DOMAIN>/_compdelivery/*?*"
]
}
}
```

Configuring protected resources is a new Cobrowse feature. It uses the same wildcard URL patterns as Cobrowse Page Masking. For more details, see Page Masking in the *Cobrowse Deployment and Use Guide*.

Adding Content to a Page

Components and content items provide the features and content your users want and section layouts let you arrange them automatically.

- What is a site component?
- What is a section layout?
- How do I add content to a page?
- How do I work with content items on a site?
- What are triggers and actions?
- How do I use triggers and actions?

For information about using individual components, see Working with Site Content.

To learn how to manage components and layouts, see Managing Custom Components and Layouts.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

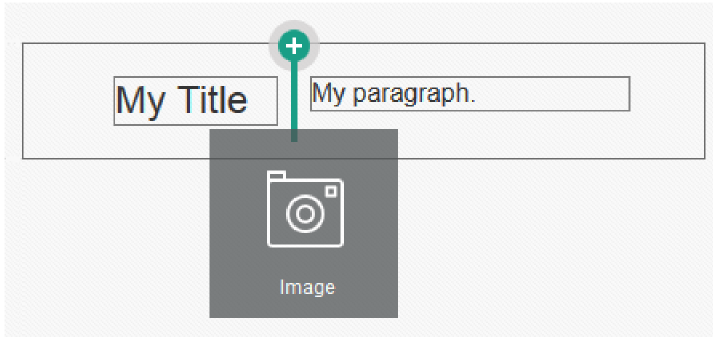
What is a site component?

Components are the individual parts of a web page. When you look at a web page, what do you see? You probably see a few titles, some paragraphs of text, and several links to other pages in the site. You might also see images, buttons, dividers, maps, and galleries. Each of these items is a component.

To add a component to a page, make sure that is set to **Edit**, click and then to show the list of built-in components or to show the list of custom components.

Drag the component from the panel and drop it into a slot on the page. That's it. Drag and drop titles, paragraphs, images, and other components where you want them on a page.

A horizontal placement bar (put it above or below) or a vertical placement bar (put it to the left or right) indicates where the new content can go. You can have multiple items in a slot and move items on the page just by dragging them to a new location.



Settings

Each component has settings such as size, alignment, spacing, color, and borders. These define how the component looks and acts. For example, paragraph settings include font type, font size and other features that determine how text is presented.

To adjust the properties of a component, select the component, and then click  **Menu** and choose **Settings**. Different components have different kinds of settings:

Settings	Description
General	General settings include spacing, alignment, and settings that are common among components.
Style	A style is a named set of default values that govern appearance. Styles are defined in the theme. Different themes can have different styles, and within a theme, different components can have different styles. You can also manually specify style settings for a specific instance of a component.
Link	Link settings include the locations of images, documents or other resources used by the component. For buttons and other components that perform actions, link settings also include the triggers and actions supported by the component.
Components	Components that include other standard components, such as the article component, provide a list of the individual components and give you access to the settings for each of those components.
Custom	Custom settings are unique to the component and are presented separately from the standard setting groups. Remote components, for example, may store preferences at a unique URL and present them as custom settings.

Built-in Components

Oracle Content and Experience Cloud provides a wide range of components:

Component Group	Description
Basic Components	Use titles, paragraphs, and buttons as building blocks for text content.
Structure Components	Separate content on the page with dividers and spacers.
Media Components	Add visual appeal to your pages with images and video.

Component Group	Description
Document Components	Add embedded documents to your page and let users navigate and select folders and files from a shared folder.
Social Components	Engage your users in conversation, and help your users stay connected with easy links to Facebook, Twitter, and other social components.
Other Components	Use maps and components that combine titles, images, and text that provide ready-to-use story blocks.

For information about using individual components, see Working with Site Content.

Custom Components

You can easily register and incorporate remote components (apps) and even create your own components using options in the component manager.

On the home page, click , click the **Experience** tab, and click .

Click **Create** and select the associated option to create a new local component or register a remote component. Components you create and share in this way are listed in the custom components panel in the editor.

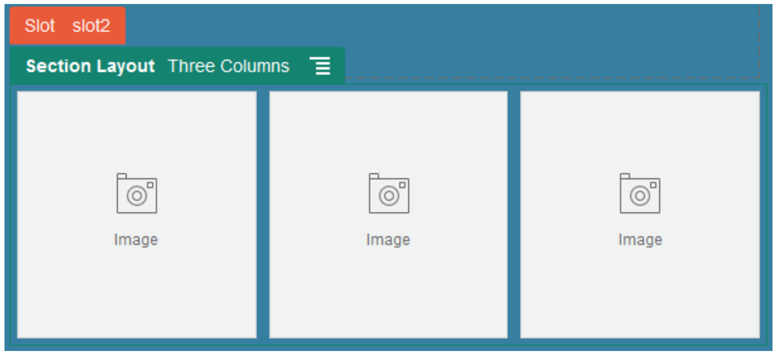
Custom Component	Description
Remote Components	You can register your own or third-party remote components (apps) hosted on a server other than the server where Oracle Content and Experience Cloud is hosted. Remote components are enclosed in an inline frame (using an iframe element). Not all remote components can be enclosed in an inline frame. Check with the provider to see if it can be enclosed.
Local Components	Developers can create components with access to the same features and capabilities as those provided by Oracle Content and Experience Cloud. You can choose to insert the component directly into the page or enclose it in an inline frame (using an iframe element). When you click **Create** to create a local component, a fully-functional sample component is added to the list of components with a name you specify and a unique identifier. As a developer, you can modify the sample to create your own solutions.

For details about how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

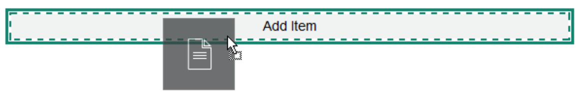
What is a section layout?

A section layout automatically organizes content added to it, making it easy for a contributor to add content without spending time formatting it on the page.

For example, a section layout can automatically organize content into multiple columns, a vertical list, or a set of tabbed areas. A site contributor can add one or more section layouts to a slot to organize content.



Drag and drop a section layout onto a page in the same way you would any other component. A placement icon indicates where the section layout will go (above, below, left, right). A solid border around a section layout or content item indicates you can drop the item and it will be placed automatically:



If you are an enterprise user working with structured content items, you can assign a section layout when you add a list of content items to a page and the section layout will automatically format the items on the page.

In addition to the layouts provided, a developer can create additional section layouts to solve particular layout problems or to simplify authoring for contributors. A theme designer can even build section layouts into a slot in a page layout. See Working with Layouts in *Developing for Oracle Content and Experience Cloud*.

How do I add content to a page?

Adding content to a page is as simple as drag and drop.

To add content to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Click and then one of the following types of content:
   - Click to show the list of built-in components.
   - Click to show the list of custom components.
   - Click to show the list of section layouts.
   - Click to show the list of content items. This option is available only if your are an enterprise user.
3. Click and hold a specific icon and drag it where you want it on the page.

When you drag an item to the page, the boundaries of available slots, section layouts, and any existing items are shown. A placement icon indicates where the new content will go (above, below, left, right). A solid border around a section layout or content item indicates you can drop the item and it will be placed automatically. You can have multiple items in a slot and move items on the page just by dragging them to a new location.

4. When you're in the right location, drop the item onto the page.
5. To adjust the properties for an item, click the item's menu icon and choose **Settings**.

   Depending on the item, you'll need to add text, specify a link to an image, specify a URL to another site or a map, resize the item, or other actions.

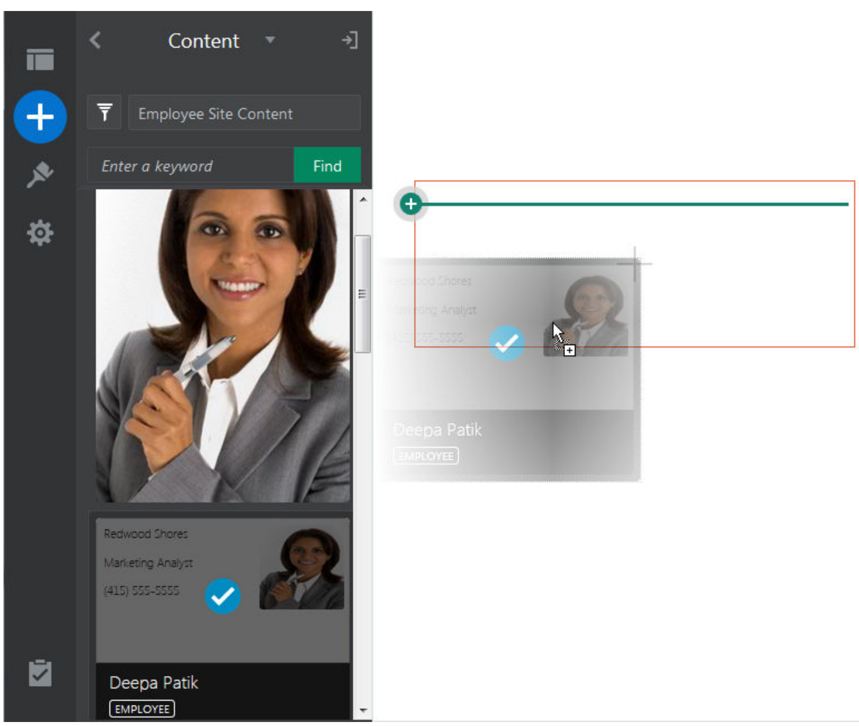
For information about using content items, section layouts, and individual components, see Working with Site Content.

How do I work with content items on a site?

If you are an enterprise user, your site can include digital assets and content items stored in a *site collection*. The items in the collection are shown in the Content panel in the site editor.

To add a digital asset or content item from the site collection to a page, make sure that is set to **Edit**, click and then to show the digital assets and content items in the site collection.

Drag the digital asset or content item from the panel and drop it into a slot on the page:



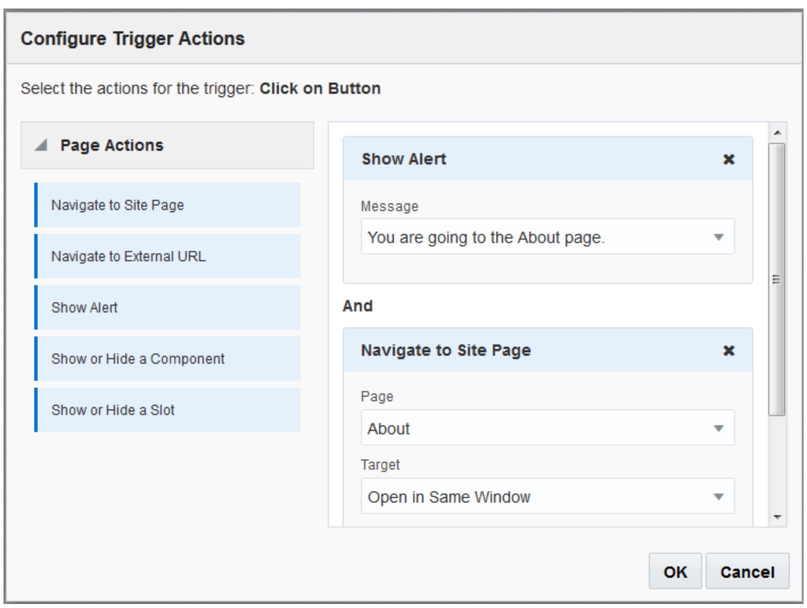
You can embed digital asset images directly into a Paragraph component at a cursor location, with options to enter alternative text, set the image height and width, and set the alignment.

If you add an item from the site collection to a page, it is automatically placed in a component of the appropriate type. For example, if you add an image digital asset, it is automatically placed in an image component. If you add a content item, it is automatically placed in a content item component. Alternatively, you can add the image or content item component first and then drag the content item from the Content panel onto the component at a later time. Or you can select **Settings** for the component, then click **Select** to choose an image from your Digital Assets or from your documents list. See Content Items.

What are triggers and actions?

Button components can initiate one or more actions such as showing or hiding page components and showing messages. Certain components, such as folder and file lists, can initiate actions in the companion component based on the selection a user makes.

For example, you can configure a button so that when the button is pushed (the trigger), the user is directed to another page or external URL and an alert is shown that notifies them of the change (the actions).



If you use more than one action, consider the order of operation and put the actions in the order you want them performed. In the example above, list the alert action first. This will give the user time to read and dismiss the message before they are redirected to the page. If you list the redirect action first, the message may be replaced with the new page before the user has a chance to read it.

Page Actions

All components that support triggers and actions support page actions:

- **Navigate to Site Page**: Select a page on the current site.
- **Navigate to External URL**: Specify a full URL to an external page or site.

- **Show Alert**: Show a specified message in a window.
- **Show or Hide a Component**: Select a component from the list of components on the current page to show, hide, or toggle.
- **Show or Hide a Slot**: Select a slot from the list of slots on the current page to show, hide, or toggle.

Component-specific actions

In addition to page actions, components can define their own actions. These actions can allow a component to communicate with other components and initiate actions in a companion component. For example, when a user selects a folder in the folder list component, the file list component can display the files in the selected folder. In this case, the folder list component supports the **Folder Selected** trigger and the file list component supports the **Display Files** action.

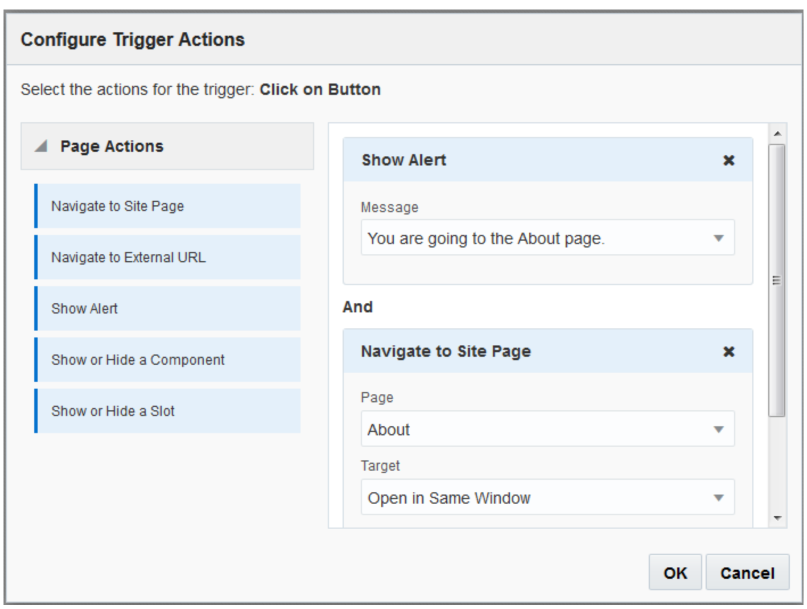
When you add components that support actions to a page, the component and any actions they support are added to the list of available actions. Some components support only actions or certain actions. Some component provide triggers, but do not themselves support any actions.

To learn how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud*.

How do I use triggers and actions?

Certain components, such as buttons and folder and file lists, can initiate one or more actions such as showing or hiding page components and showing messages.

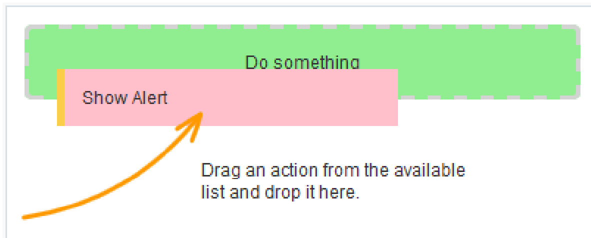
For example, the image below shows the **Show Alert** and **Navigate to Site Page** actions selected for a button component. When the button is pushed (the trigger), the alert is shown, and when the user clicks OK to dismiss the message, the About page on the site is displayed (the actions).



For example, to specify one or more actions for a button component:

1. Click the button’s menu icon and choose **Settings**.
2. In the Settings panel, click **Link**.
3. Click **Select Link Type** and choose **Trigger Actions**.
4. Under Available Triggers, click **Click on Button**.
5. In the Configure Trigger Action window, click and drag an action from the column on the left and drop it on the slot labeled **Do something**.

   For example:

   Page actions include:

   - **Navigate to Site Page**: Select a page on the current site.
   - **Navigate to External URL**: Specify a full URL to an external page or site.
   - **Show Alert**: Show a specified message in a window.
   - **File Preview** (file list component only): Overlay a selected file over a dimmed and inactive version of the page.
   - **Show or Hide a Component**: Select a component from the list of components on the current page to show, hide, or toggle.
   - **Show or Hide a Slot**: Select a slot from the list of slots on the current page to show, hide, or toggle.

   In addition to page actions, components can define their own actions. These actions can allow a component to communicate with other components and initiate actions in a companion component. Any components that support actions are listed beneath the page actions. You can drag and drop any supported action from any available component to the action list. You can specify that the action is performed in a specific component, or you can select **All components with this action** and the action will be performed in all components on the page that support the action without having to explicitly define the interaction for each component.
6. To add another action, click and drag it from the list of actions and drop it on the slot labeled **Do something else**.

   You can add the same action more than once. The actions you specify are performed in the order they are listed.

Note:

If you use more than one action, consider the order of operation and put the actions in the order you want them performed. You can’t reorder the items in the list. You must remove them and add them back in the order you want.

15 Working with Site Content

Components, section layouts, digital assets, and structured content give you the flexibility to provide the content and features your users want.

This section provides information about using individual components. For other information about components, see the following:

- To learn how to use components in your site, see Adding Content to a Page.
- To learn how to manage components, see Managing Custom Components and Layouts.
- To learn how to create your own components, see Developing Components in *Developing for Oracle Content and Experience Cloud* .

Basic Components

- How do I use titles?
- How do I use paragraphs?
- How do I use plain text?
- How do I use buttons?

Structure Components

- How do I use dividers?
- How do I use spacers?

Media Components

- How do I use images?
- How do I use galleries?
- How do I use a gallery grid?
- How do I use a YouTube video?
- How do I use video?

Document Components

- How do I use documents?
- How do I use a folder list?
- How do I use a file list?
- How do I use documents manager?
- How do I use a project library?

Social Components

- How do I use the social bar?

- How do I use Facebook Like?
- How do I use Facebook Recommend?
- How do I use Twitter share?
- How do I use Twitter follow?
- How do I use a conversation component?
- How do I use a conversation list?

Process Components

- How do I use a process start form?
- How do I use a process task list?
- How do I use a task detail form?

Other Components

- How do I use maps?
- How do I use a headline?
- How do I use an article?
- How do I use an image with text?
- How do I use a component group?
- How do I use Cobrowse on a page?
- How do I use Oracle Policy Automation?
- How do I use Oracle Visual Builder Cloud Service?

Section Layouts

- How do I use a horizontal section layout?
- How do I use a vertical section layout?
- How do I use a two-column section layout?
- How do I use a three-column section layout?
- How do I use a tabbed section layout?
- How do I use a slider section layout?

Content Items

- How do I use a content item component?
- How do I use a content placeholder component?
- How do I use a content list component?
- How do I use a content search component?

Basic Components

Basic components provide the building blocks for text content.

- How do I use titles?

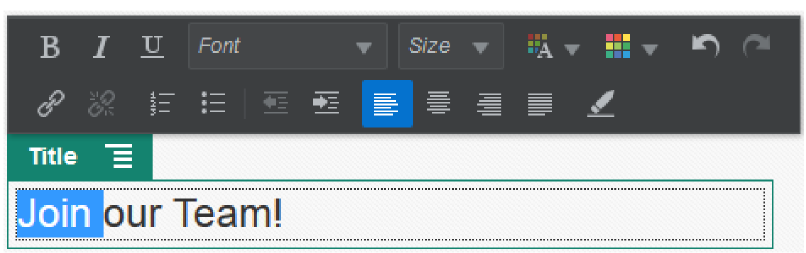
- How do I use paragraphs?
- How do I use plain text?
- How do I use buttons?

How do I use titles?

To add and format a title component:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the title component to enter the title text. The text takes on the formatting of the default style for the component.
4. To add a link within the title text:
   a. Enter and select the text you want to use as the link text, then click .
   b. Click **Select Link Type** and choose one of the following options:
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a selected file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
      - **File Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

   To remove a link, click anywhere in the link text and click .
5. If you want to change the default formatting, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.



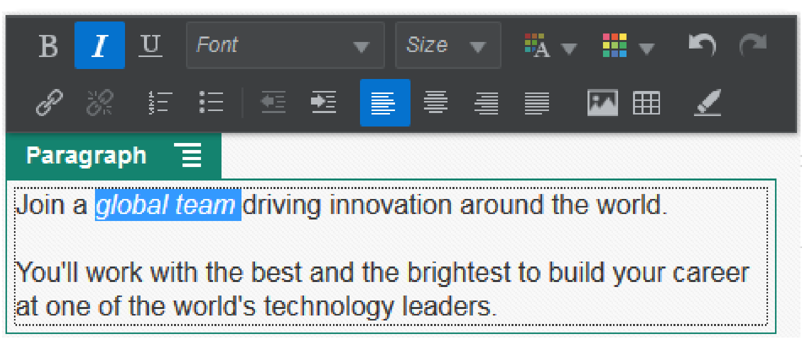
   Changes you make are applied immediately. These formatting changes are applied over the base style. If you change the base style, the overrides remain in place.
6. To remove the formatting applied with these options, select the text and click .

How do I use paragraphs?

To add and format a paragraph component:

1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the paragraph component to enter the text. The text takes on the formatting of the default style for the component.
4. To add an image, click  and select the image to use. You can select from your documents or your Digital Assets. Adjust the settings for the image as needed.
5. To add an additional paragraph within a paragraph component, just press Enter.
6. To add a link within the paragraph:
   a. Enter and select the text you want to use as the link text, then click .
   b. Click **Select Link Type** and choose one of the following options:
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a selected file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
      - **Lightbox Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

   To remove a link, click anywhere in the link text and click .
7. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.

   Changes you make are applied immediately. These formatting changes are applied over the base style. If you change the base style, the overrides remain in place.
8. To remove the formatting applied with these options, select the text and click .

How do I use plain text?

The text component lets you add text to the page and format it exclusively using styles defined in the theme. The formatting tool bar is not available when editing the content, so you can't override the selected style with custom formatting.

This can be useful if you use standardized formatting for elements such as headings. You can update the styles defined in the theme and automatically update the associated text throughout the site without format overrides that would prevent it.

To add a text component:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the paragraph component to enter the text. The text takes on the formatting of the default style for the component (<p> or paragraph element).

   To add an additional paragraph, just press Enter.

   > **Note:**
   >
   > You can copy and paste content from other sources into the text component, but images and underlying HTML tags are removed.

4. To change the base style for the text component:

   a. Click the component's menu icon and choose **Settings**.

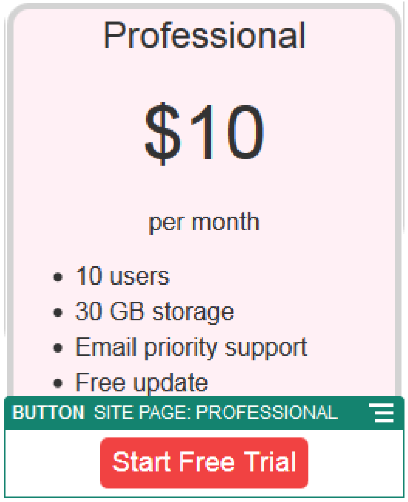
   b. Click **Choose Style** and choose the style from the menu.

      The list includes standard HTML tags for paragraph and headings. The style you select assigns the associated tag to the content.

   The component reflects the selected base style.

How do I use buttons?

Use a button to make a link or other functionality more apparent on the page.



To add a button to the page:

1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To adjust the properties for the button, click its menu icon  and choose **Settings**.

   You can specify the text on the button (label), size, alignment and other display options for the button.

   > **Note:**
   >
   > If you set the **Width** and **Height** fields to 0 (zero), the button will automatically size to the fit the text you specify for the label.

   To specify the background color, font, border, and other settings, click the **Style** tab. You can choose from the predefined styles in the current theme or click **Customize** to specify your own values.
4. To associate a link or other actions with a button:
   a. In the Settings panel, click **Link**.
   b. Click **Select Link Type** and choose one of the following options:
      - **No Link**: The button performs no action when the user clicks it.
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a selected file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
      - **Lightbox Preview**: Preview and optionally download a selected file in an overlay over a dimmed and inactive version of the page.

- **Trigger Actions**: Select one or more page actions to perform when the button is pushed. Page actions include:
  - **Navigate to Site Page**: Select a page on the current site.
  - **Navigate to External URL**: Specify a full URL to an external page or site.
  - **Show Alert**: Show a specified message in a window.
  - **Show or Hide a Component**: Select a component on the current page to show, hide, or toggle.
  - **Show or Hide a Slot**: Select a slot on the current page to show, hide, or toggle.

See How do I use triggers and actions?

Structure Components

Structure components help to separate content on the page.

- How do I use dividers?
- How do I use spacers?

How do I use dividers?

Use a divider (horizontal line) to create a visual break in a column or across a page.

To add a divider to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?

3. To adjust the properties for the divider, click its menu icon and choose **Settings**.

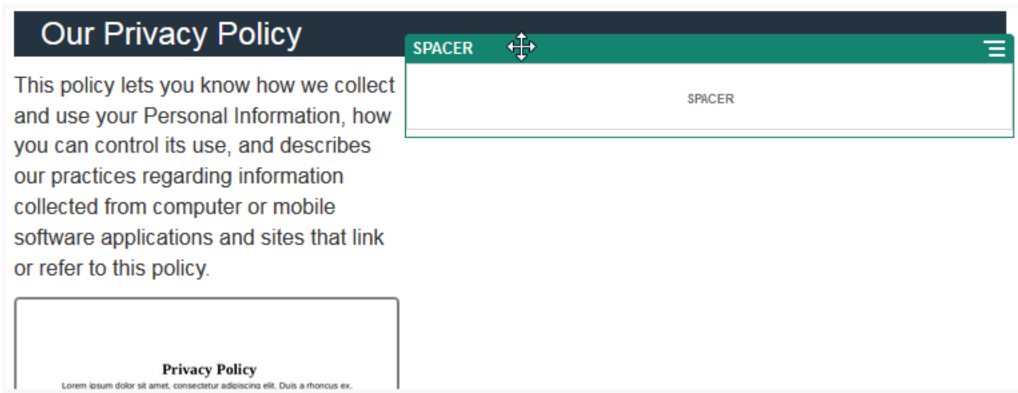
   You can specify the horizontal placement and length of the divider by adjusting the left and right spacing options.
   Line color, thickness, and other settings are defined by the component style. You can choose from the predefined styles in the current theme or click **Customize** to specify your own values.

How do I use spacers?

Managing the “white space” on pages can make the page more visually appealing and more readable. Use the spacer component to add white space without having to override the spacing defined in styles or in other components.

To add vertical blank space between components in the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?



3. To adjust the height of the spacer, click its menu icon and choose **Settings**.

Media Components

Media components bring image and video to your pages.

- How do I use images?
- How do I use galleries?
- How do I use a gallery grid?
- How do I use a YouTube video?
- How do I use video?

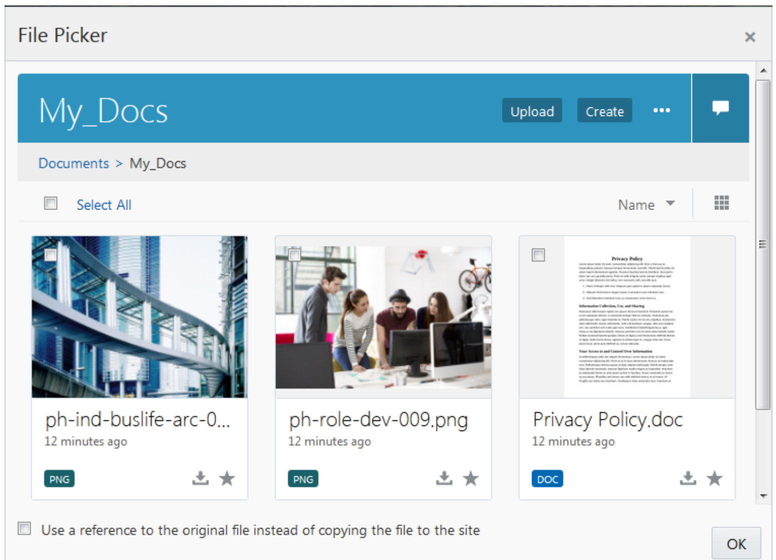
How do I use images?

Images can direct a viewer’s attention and invite the viewer to explore different content areas on the page.

To add an image to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The image component shows a placeholder image until you select the image you want to use.

3. To select an image, click the menu icon, choose **Settings**, and click **Select** next to the Image field.



You can use images from Oracle Content and Experience Cloud or another repository to which you have access. You can also use images that have been shared with you or that you upload from a local or network file location. See How do I upload files?

4. Select an image from the repository:

> **Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

   a. Locate and click the image you want to use.

   b. To link to the file in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.

c. Click **OK**.

5. Use the Settings panel to add a caption or to modify spacing, alignment, style, and other options.

6. You can associate a link or other actions with an image:

   a. In the Settings panel, click **Link**.

   b. Select one of the following options:

      - **No Link**: The image performs no action when the user clicks it.
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a specified file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
      - **Lightbox**: Open the image over a dimmed and inactive version of the page.

How do I use galleries?

Use an image gallery to present a series of images. You can choose to let the images automatically cycle or let the user advance through the images manually.

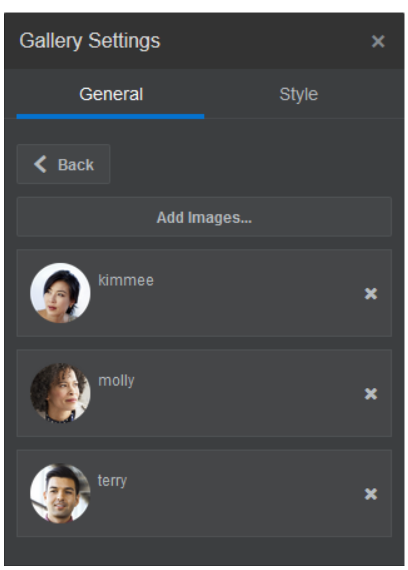
To add an image gallery to the page:

1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?

2. Add the component to the page. See How do I add content to a page? The gallery component shows a placeholder image until you select the images you want to use.

3. To add one or more images to the gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.

4. Click **Add Images**.



You can use images from Oracle Content and Experience Cloud or another repository to which you have access. You can also use images that have been shared with you or that you upload from a local or network file location. See How do I upload files?

5. Select one or more images in the repository.

> **Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

   a. Locate and click the image or images you want to use.
   b. To link to the file in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.
   c. Click **OK**.

   The selected images are added to the list of images. Drag and drop the images to reorder them in the list. The default title of each image is the file name without the extension.

6. To change the title, description, or other options for a particular image, click the image in the list and make the change.

   You can also associate a link or other actions with an image in the gallery:

   a. In the Settings panel for a particular image, click the Link field.
   b. Select one of the following options:
      - **No Link**: The image performs no action when the user clicks it.
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a specified file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
   c. Click **Back** to return to the image settings panel. Click **Back** again to return to the image list to select another image to update.
   d. When you're done updating individual images, click **Back** to specify gallery options.

7. To size and scale images in the gallery:

   a. Use **Width** to specify the width, in pixels, of the gallery within the slot. Click an alignment option other than **Fill** to specify the width. After you set the width, you can use **Fill** to extend the image to the specified width.
   b. Select a **Scaling** option to adjust the presentation of images in the gallery:

- **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.
- **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.
- **Stretch**: The larger of the two dimensions (width or height) is scaled to fit the available space and the smaller dimension is stretched to fill the available space.
- **None**: The image is used at its full pixel resolution and is cropped uniformly if it doesn't fit in the available space.

8. To help the user move through the gallery:
   a. Select a **Navigation** method:
      - **Thumbnails**: Show a list of the images in the gallery in sequence below the gallery. The user clicks a thumbnail image to go to the associated image in the gallery.
      - **Indexer**: Show a series of buttons below the gallery to represent each image in the gallery. The user clicks a button to go to the associated image in the gallery.
      - **None**: Provide no visual navigation. The user can swipe right or left to display the adjacent image. This manual method is always available.

   b. Click **Show Previous/Next** to include arrow icons on each image to advance to the previous or next image in the gallery.
9. You can elect to show or hide a caption for the image by selecting the **Show Caption** box.
10. To have the gallery cycle through the images automatically, select **Autoplay** and specify **Transition Time** and **Display Time**.

    The user can still use all the manual navigation features you set up.

How do I use a gallery grid?

Use a gallery grid to present a set of images at one time in rows and columns.

To add an image gallery to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The gallery grid component shows a placeholder image until you select the images you want to use.
3. To add one or more images to the gallery, click its menu icon , choose **Settings**, and click **Images** on the **General** tab.
4. Click **Add Images**.

   You can use images stored in Oracle Content and Experience Cloud or in another repository to which you have access. You can also use images that have been shared with you or that you upload from a local or network file location. See How do I upload files?

5. Select one or more images in the repository.

> **Note:**
>
> The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing an image file, you must select a file with a valid image format (GIF, JPG, JPEG, PNG, or SVG).

   a. Locate and click the image or images you want to use.
   b. To link to the file in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.
   c. Click **OK**.

   The selected images are added to the list of images. Drag and drop the images to reorder them in the list (and in the grid). The default title of each image is the file name without the extension.

6. To change the title, description, or other options for a particular image, click the image in the list and make the change.

   You can also associate a link or other actions with an image in the gallery:

   a. In the Settings panel for a particular image, click the Link field.
   b. Select one of the following options:
      - **No Link**: The image performs no action when the user clicks it.
      - **Web Page**: Specify a full URL to an external page or site.
      - **Site Page**: Select a page on the current site.
      - **File Download**: Download a specified file from the repository.
      - **Email**: Specify a valid email address. The resulting message is opened in and sent through the default email client.
      - **Lightbox**: Open the image over a dimmed and inactive version of the page.
   c. Click **Back** to return to the image settings panel. Click **Back** again to return to the image list to select another image to update.
   d. When you're done updating individual images, click **Back** to specify gallery options.

7. Use the **Layout** option to arrange the images in a grid.
   - Masonry
   - Columns
   - Custom

Each of these options is described in the steps that follow.

8. Choose the **Masonry** layout to automatically arrange the images in rows within the available space.

   The resulting rows have a uniform height, but no defined columns.

   a. Specify **Height** to proportionately scale all images to the specified height in pixels.

   b. Specify **Image Spacing** to increase or decrease the space between images in the row.

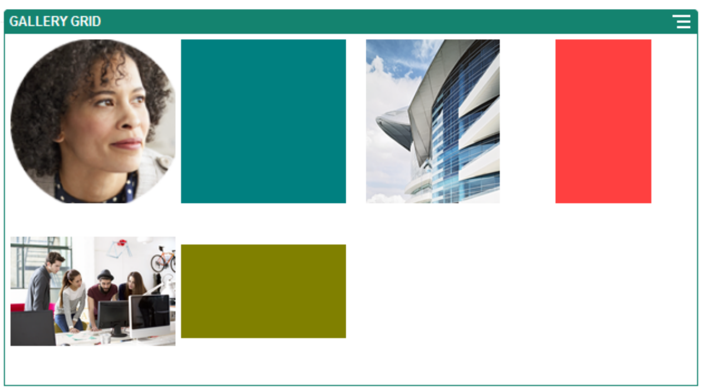
9. Choose the **Column** layout to arrange the images in rows and columns.

   a. Select a **Scaling** option to adjust the presentation of images in the grid:

      - **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.

      - **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.

      For example, the following grid uses four columns and scales the six images to fit:

      Here’s the same grid with the images cropped:

b. Specify an **Aspect Ratio** to determine the shape of the cells in the grid.
   - **Square**: An aspect ratio of 1:1.
   - **Landscape**: An aspect ratio of 16:9.
   - **Portrait**: An aspect ratio of 9:16.
   - **Custom**: Specify your own numeric values for the aspect ratio.

c. Specify the number of **Columns**.

   The grid adjusts automatically to create columns of equal width.

d. Specify **Image Spacing** to increase or decrease the space between images in both rows and columns.

10. Choose the **Custom** layout to arrange the images in rows and columns based on an image size and width that you specify.

    a. Select a **Scaling** option to adjust the presentation of images in the grid:
       - **Crop**: The smaller of the two dimensions (width or height) is scaled to fit the available space and the larger dimension is cropped to prevent stretching the image.
       - **Fit**: Each image is scaled so the entire image fits in the available space without distorting the image.

    b. Specify an **Image Height** and **Image Width** to determine the shape of the cells in the grid.

       The grid adjusts automatically to create cells with the dimensions you specify.

    c. Specify **Image Spacing** to increase or decrease the space between images in both rows and columns.

11. Specify **Alignment**, **Width**, and **Spacing** options to position the grid within the slot.

    Use **Width** to specify the width, in pixels, of the gallery within the slot. Click an alignment option other than **Fill** to specify the width. After you set the width, you can use **Fill** to extend the image to the specified width.

How do I use a YouTube video?

Include streaming YouTube videos to add motion and visual engagement to the page.

To use videos other than those hosted by YouTube, see How do I use video?

To add a YouTube video to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The component shows a placeholder image until you select the video you want to use.
3. To specify the YouTube video to use and to adjust its display properties, click its menu icon and choose **Settings**.
4. Locate the video you want to use, then copy the URL and paste it into the **YouTube URL** field.
5. Specify any display options:
   - **Show Controls**: Enable on-screen and device options to allow the user to manually control video playback.
   - **Show info**: Temporarily include the video description in the upper left corner of the video.
   - **Autoplay**: Automatically start video playback.
   - **Loop**: Automatically repeat the video after it completes.
6. Use the **Aspect Ratio** defined for the video (**Auto**) or choose another aspect ration to determine the shape of the video display.
7. Specify any alignment or spacing options to position the video.

How do I use video?

Include videos streamed from Oracle Content and Experience Cloud to add motion and visual engagement to the page.

To use videos hosted by YouTube, see How do I use a YouTube video?
To stream a video stored in Oracle Content and Experience Cloud:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The component shows a placeholder image until you select the video you want to use.
3. To specify the video to use and to adjust its display properties, click its menu icon and choose **Settings**.
4. Choose the video you want to use.
   a. Click **Select**.
   b. Locate and choose the video from the files in Oracle Content and Experience Cloud.

> **Note:**
>
> Chose a video file of type MP4. The MP4 video format is common to all supported browsers.

c. To link to the video in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the video is stored with the site and referenced from the site.

   Video files can be large. Linking to the original video avoids duplicating the content. In addition, the link allows site visitors to see the video even if the permissions on the video file change or would otherwise restrict viewing.

5. Select a preview image for the graphic. Some videos have a pre-defined preview image. Those that don't show a blank screen as the preview image. If you want to use a graphic in place of a blank screen, click **Select** and choose an image from your Digital Assets repository.
6. Specify any display options:
   - **Show Controls**: Enable on-screen and device options to allow the user to manually control video playback.
   - **Show Description**: Temporarily include the video description in the upper left corner of the video.
   - **Autoplay**: Automatically start video playback.
   - **Loop**: Automatically repeat the video after it completes.
7. Use the **Aspect Ratio** defined for the video (**Auto**) or choose another aspect ration to determine the shape of the video display.
8. Specify any alignment or spacing options to position the video.

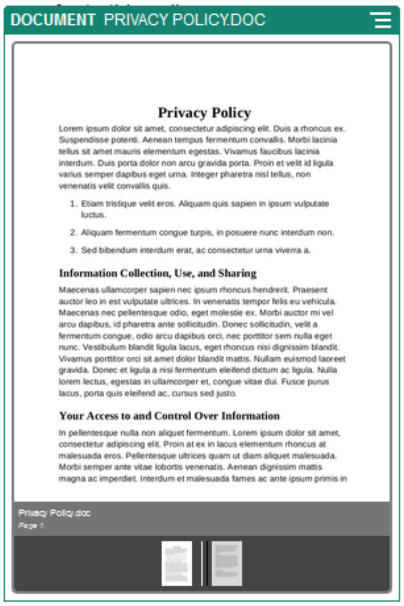
Document Components

Let's look at some components that let you access and display files and folders.

- How do I use documents?
- How do I use a folder list?
- How do I use a file list?
- How do I use documents manager?
- How do I use a project library?

How do I use documents?

You can view multi-page documents and slide presentations directly from a page.



To add a document to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The document component shows a placeholder image until you specify the document to show.
3. To select a document, click its menu icon , choose **Settings**, and click **Select** next to the Document field.

   You can use documents from Oracle Content and Experience Cloud or another repository to which you have access. You can also use documents that have been shared with you or that you upload from a local or network file location. See How do I upload files?
4. Select a document in the repository and click **OK**.

   > **Note:**
   >
   > The window displays all available files. You must choose the file type that's appropriate for the context. For example, if you're choosing a document file, you must select a file with a valid document format such as TXT or DOC.

5. Use the Settings panel to add a caption or to modify spacing, alignment, style, and other presentation options.
6. To help the user move through the document:
   a. Click **Show Page Numbers** to show a page number below each page.
   b. Select a **Navigation** method:

   - **Thumbnails**: Show a list of the pages in the document in sequence below the document. The user clicks a thumbnail image to go to the associated page.
   - **Indexer**: Show a series of buttons below the document to represent each page in the document. The user clicks a button to go to the associated page.
   - **None**: Provide no visual navigation. The user can swipe right or left to display the adjacent page. This manual method is always available.

c. Click **Show Previous/Next** to include arrow icons on each page to advance to the previous or next page in the document.

How do I use a folder list?

You can use a folder list to list the folders within a specified folder from your Oracle Content and Experience Cloud account.

If you use this component in conjunction with one or more file list or document manager components on the page, these components can automatically display the contents of a folder selected in the folder list.

To add a folder list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to set the default details about the content that's displayed.
5. Click **Select** next to **Folder Selection** to change the folder to use for display. You must select a folder other than document repository home page. Click **Back** when you are done.

   > **Note:**
   >
   > The folder list grants all users downloader access. Users can view and download files regardless of their role. If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

6. Choose from the following to set additional defaults for the content that's displayed.
   - **Choose Default Selection**: If you selected **Oracle Documents Folder**, select the folder (if any) to show as selected in the list.
   - **Show folder name header**: Select this to display the folder name in the heading of the embedded component.

- **Folder Sorting**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.
- **Show Subfolders**: Use the slide bar to limit the number of subfolders displayed.

7. Use the General tab to modify spacing, alignment, and other presentation options.
8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

For information about using the web interface, see Managing Your Files and Folders.

How do I use a file list?

You can use a file list to provide a view of files from a specified folder in your Oracle Content and Experience Cloud account.

If you use this component in conjunction with one or more folder list components on the page, the file list component can automatically display the contents of a folder selected in the folder list. You can also configure the component to perform one or more actions when a user clicks a file in the list. For example, you can preview the selected file in a separate browser window, or in a "lightbox" overlay, or even in a Documents Manager component on the page.

To add a file list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add a component group to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to set the default details about the content that's displayed.
5. Click **Select** next to **Folder Selection** to change the folder to use for display. You must select a folder other than document repository home page. Click **Back** when you are done.

> **Note:**
>
> The file list grants all users downloader access. Users can view and download files regardless of their role. If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.

6. Choose from the following to set additional defaults for the content that's displayed.
   - **Display options**: Choose what details will be shown with the listed files.
     – **Folder name header**: show the folder name in the heading.
     – **File description**: show the file description, if one is given.
     – **File separators**: separate each file by a line.

   - **Download icon**: include a download icon so users can download the file if they want.
   - **Last updated**: show the date when the file was last updated.
   - **File size**: show the size of the file.
   - **Image**: show a thumbnail image of the contents of the file.
- **Triggers & Actions**: Choose if you'd like to auto-refresh the file list with contents of the folder selected in a Folder List component. You can also choose to enable the File Selected trigger when a file is selected. Use the Link tab to associate actions with the **File Selected** trigger.
- **File Sorting**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.
- **Show Files**: Choose if all files will be displayed or if you want to limit the number of files using the slider bar.

7. Use the General tab to modify spacing, alignment, and other presentation options.
8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.
9. Use the Link tab to associate actions with the **File Selected** trigger. For example, to configure the file list component to preview a selected file in a lightbox overlay:
   a. Make sure you select **Activate trigger when file is selected** in the File List Settings window.
   b. In the Link tab of the file list settings, click the **File Selected** trigger.
   c. Click and drag the **Lightbox Preview** page action to the action list.
   d. In the File ID or URL field, choose **File Link**.

      File Link uses a reference link with downloader privileges so all site visitors can preview and optionally download the file. If you use **File ID**, a member link is used. A member link allows only registered users to preview and optionally download the selected file.

   When the user clicks on a file in the file list, the file preview opens over a dimmed and inactive version of the page.

For information about using the web interface, see Managing Your Files and Folders.

How do I use documents manager?

You can use documents manager to provide a view of your home page or files in Oracle Content and Experience Cloud.

To add a documents manager component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to set the default details about the content that's displayed.

5. Click **Select** next to **Folder Selection** to change the folder to use for display.

   To select a folder, check the box next to the folder name. To open a folder, click the folder name. Click a folder name in the path to return to that folder or click **Navigate to Home** to return to the home folder. Click **Back** when you are done.

6. Click **Select Folder Access** and choose the access role to grant visitors.

   Visitors will be able to view and work with the folder content based on their role and on the **Browsing Options** you enable in the next step.

   - **Member Access**: Visitors will be able to use any features available to members of the folder, such as viewing conversations, annotations, or custom properties of items.
   - **Viewer**: Viewers can look at files and folders, but can't change things.
   - **Downloader**: Downloaders can also download files and save them to their own computer.
   - **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

   > **Note:**
   >
   > - A site author can't grant access to a folder that is greater than the access they themselves have. For example, if the author has downloader access to a folder, they can't give contributor rights to site visitors.
   > - The privileges set on the folder in the component can augment the visitor's privileges. For example if the visitor has viewer privileges (or no privileges) for the folder, the component can grant greater privileges based on the selected role. These enhanced privileges are valid only in the component itself.
   > - If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.
   > - Privileges granted on a folder apply to the folders and files nested in that folder.

7. Choose from the following to set additional defaults for the content that's displayed.

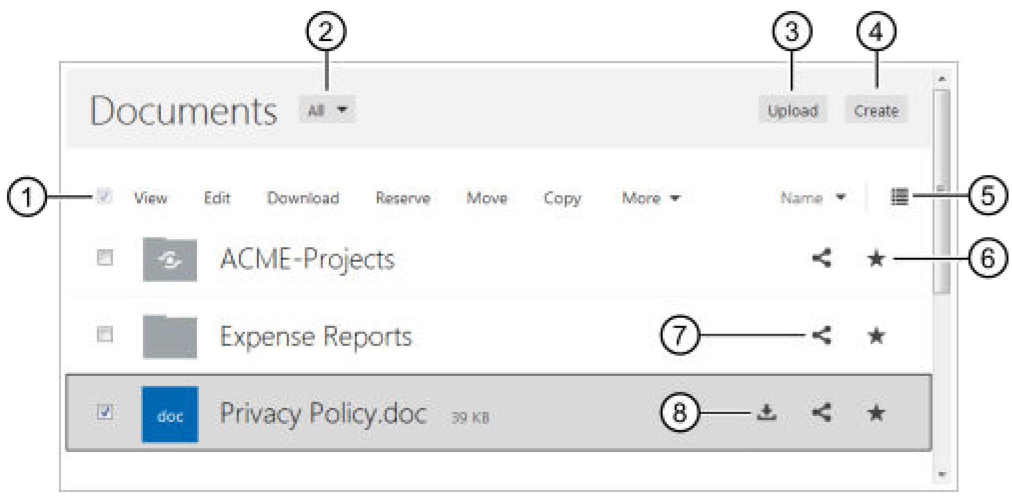
   - **Layout**: Select an initial grid , list or compact list layout for the folders and files. Users can change the layout when they view the finished embedded component.
   - **Color Scheme**: Choose one of the available color schemes for the embedded folder listing.
   - **Sort Order**: Choose how the items will be initially displayed, either alphabetically by name, or by when the items were last updated.
   - **Browsing Options**: Choose what options will be available to users when they select an item. For example, you can choose to allow users to view files, download files, share or copy files and folders, or delete files. If you want to restrict what users can do with your files and folders, deselect an option in this

list. If you chose Member Access in the previous step, you can elect to show a side pane where any conversations, annotations, or custom properties will be shown.

- **Viewer Options**: Choose how users will view files. You can allow files to be viewed within the embedded frame or in another tab (or window depending on your browser settings). You can also hide or show thumbnails, and customize how videos are viewed.
- **Show Zoom Controls**: Choose whether to show a slider bar or zoom controls in the embedded view of the folder.
- **Viewer Fit Mode**: You can choose to have files be shown filling the page, filling the width of the page, or in the original size.
- **Triggers & Actions**: Choose to refresh a file list if it is also used with the folder list component.

8. Use the General tab to modify spacing, alignment, and other presentation options.
9. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

After the documents manager has been added, viewers will see a view of the selected folder embedded in a frame on your site. Users can use the provided display options to change how folders and files are listed. If a user selects a file or folder, they can choose options provided by the menu bar or with the right-click menu and perform any action allowed by their role and the **Browsing Options** you specify:



- The **menu bar (1)** has options for working with the selected item such as **Move**, **Copy**, **Delete**, **Share**, and so on. Some options are available only for folders or only for files. You can work with only 1 item at a time.

  Tip: Looking for a shortcut? Right-click an item to open the context menu and choose an option.

  > **Note:**
  >
  > Independent conversations (those not associated with a folder) must be added using the conversation component.

In folders other than the home folder, the folder path is displayed above the menu bar. Click any folder in the path to display that folder.

- In the home folder, use the **filter menu (2)** to show all folder content or only content that is owned by you, shared with you, marked as a favorite, or in the trash.

> **Note:**
>
> The filter menu is available only in the home folder.

- Click **Upload (3)** to upload a local file to the current folder.
- Click **Create (4)** to create a new folder in the current folder.
- Use the **display options (5)** to show the folder content in a list or in a grid and sort items either by name or by the date they were last updated.
- Use the **Add to Favorites (6)** icon to include the item in your list of favorites.
- Use the **Share** icon **(7)** associated with an item to create a member link to share the item with registered users or to create a public link to share the item with all users.

  In folders other than the home folder, a **Share** button is also provided next to the **Upload** button **(3)** to share the current folder.
- Use the **Download** icon **(8)** associated with a file to download a copy of the file to local storage.

If a conversation is associated with an item, you'll see with the item. Click it to open the conversation pane where you can view annotations and comments. If an item has custom properties, you can view the properties in a pane. Click **More** then select **Custom Properties** to open the property pane.

For information about using the web interface, see Managing Your Files and Folders.

How do I use a project library?

You can use a project library to assemble folders from different locations in the repository without having to change the original folder or its location. You can also use the project library component to assign different permission levels to each folder to accommodate different project team roles.

For example, if you give a folder in the project library one of the visitor roles (viewer, downloader, or contributor), visitors can see and interact with the folder content with the privileges associated with the role. If you specify member access, only members will see it listed in the project library. Members interact with the folder content with the privileges specified for them on the original folder.
If you use this component in conjunction with one or more file list or document manager components on the page, these components can automatically display the contents of a folder selected in the project library.

To add a project library component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?

2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon, and choose **Settings**.
4. Choose **Custom Settings** to select conversations and to select display options.
5. Specify a title. The default title is Project Library. You can choose to display or hide the title by selecting or deselecting the **Title** display option below.
6. Select a **Color Scheme**.

> **Note:**
>
> If you use triggers and actions to associate a project library with a documents manager component, the color scheme you select for the project library also applies to the folder selected to show in the documents manager component. This is not the case if you associate the project library with folder list or file list components because those components do no support color schemes.

7. Click **Add** next to the list of folders to add an existing folder or to create a new folder.
   a. Navigate to and Select one or more folder or click **Create** to create a folder. Each folder you select in this window is added to the project library.

      You can use any of the options listed in the tool bar including view and sort options.
   b. Click **Back** when you are done.
8. To organize the list, select a folder and click **Move Up** or **Move Down** to change its location in the list order or click **Remove** to remove the folder from the list.
9. To specify access to a folder based on the user's role, select the folder from the list of folders, click **Select Folder Permission**, and choose the access role.
   - **Member Access**: Only registered users with permissions on the folder will see the folder listed in the project library. Members interact with the folder content with the privileges specified for them on the original folder.
   - **Viewer**: Viewers can look at files and folders, but can't change things.
   - **Downloader**: Downloaders can also download files and save them to their own computer.
   - **Contributor**: Contributors can also modify files, update files, upload new files, and delete files.

> **Note:**
>
> - A site author can’t grant access to a folder that is greater than the access they themselves have. For example, if the author has downloader access to a folder, they can’t give contributor rights to site visitors.
> - The privileges set on the folder in the component can augment the visitor’s privileges. For example if the visitor has viewer privileges (or no privileges) for the folder, the component can grant greater privileges based on the selected role. These enhanced privileges are valid only in the component itself.
> - If a site visitor has privileges that are greater than those specified for the component, their individual privileges override those set on the component.
> - Privileges granted on a folder apply to the folders and files nested in that folder.

10. For folders with **Member Access** permission, you can display conversations associated with folders or content by clicking **Show Conversation pane in Documents Manager**.

    If you select this option and configure a documents manager component on the page to display a selected folder, the user can click the conversation icon to display any conversations associated with the folder. If you do not select this option, the conversation icon is not shown.

11. When you are done, close the window.
12. Use the General tab to modify spacing, alignment, and other presentation options.
13. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.
14. Use the Link tab to associate actions with the **Folder Selected** trigger. For example, if you also add a documents manager component to the page, you can use the documents manager component to display the contents of a folder selected in the project folder:
    a. In the Link tab of the project library settings, click the **Folder Selected** trigger.
    b. In the Configure Trigger Actions window, click Documents Manager.
    c. Click and drag the **Display documents** action to the action list.
    d. In the Folder ID or URL field, choose **Selected Folder**.

    When the user clicks on a folder in the project library, the folder content is displayed in the documents manager component on the page.

For information about using the web interface, see Managing Your Files and Folders.

Social Components

Social components help your users stay connected and communicate.

- How do I use the social bar?

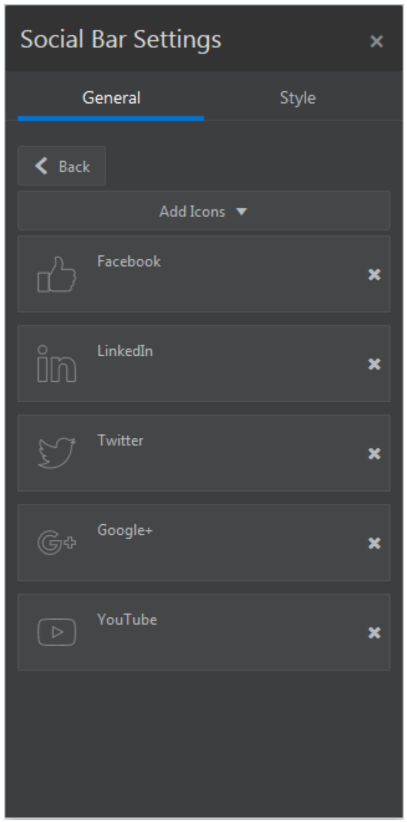
- How do I use Facebook Like?
- How do I use Facebook Recommend?
- How do I use Twitter share?
- How do I use Twitter follow?
- How do I use a conversation component?
- How do I use a conversation list?

How do I use the social bar?

Easily add icons and links to popular social media, such as Facebook and Twitter. The social bar includes some targets by default, but you can add and remove items in the social bar.

To add and modify a social bar:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The social bar shows the icons included by default.
3. To add or change the icons in the social bar, click its menu icon , choose **Settings**, and click **Icons** at the top of the **General** tab.



To remove a social icon, click the x next to the name. To add an icon, the icon must reside in the Oracle Content and Experience Cloud repository or another repository to which you have access. You can also use images that have been shared with you or that you upload from a local or network file location.

4. To upload one or more icons from a local or network location:
   a. Click **Add Icons** at the top of the panel.
   b. Navigate to the location in the repository where you want to store the image or click to add a new folder in the current location.
   c. Click .
   d. Locate and select the image file or files and then click **Open**.

      The image files are uploaded to the current location in the repository.
5. Select one or more images in the repository and click **OK**.
   a. Locate and click the image or images you want to use.
   b. To link to the file in the repository, select **Use a reference to the original file instead of copying the file to the site**. If you do not select this option, a copy of the file is stored with the site and is referenced from the site. Linking to the original file avoids duplicating the content. The link allows site visitors to see the content even if the permissions on the file change or would otherwise restrict viewing.
   c. Click **OK**.

The selected images are added to the list of images. Drag and drop the images to reorder them in the list. The default title of each image is the file name without the extension.

6. To change the target URL, title, description or other options for a particular image, click the image in the list and make the change.

   When you're done updating individual icons, click **Back** to specify general options.

7. Specify the size, spacing, orientation, and alignment for all of the icons in the social bar.

How do I use Facebook Like?

You can add a Facebook Like button to a page to let viewers easily like your site on Facebook.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the app and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Facebook Like Settings** to set the URL and to optionally add a **Share** button so you can easily post a link to your site on a Facebook page.
5. Use the General tab to modify spacing, alignment, and other presentation options.
6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

How do I use Facebook Recommend?

You can add a Facebook Recommend button to a page to let viewers easily recommend your site on Facebook.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the app and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Facebook Recommend Settings** to set the URL and to add a **Share** button so you can easily post a link to your site on a Facebook page.
5. Use the General tab to modify spacing, alignment, and other presentation options.
6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

How do I use Twitter share?

You can add a Twitter Share button to a page to let viewers quickly share a link on a Twitter account.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the app and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Twitter Share Settings** to set the following defaults. Users can change the values when they use the button.
   - **Share URL**: The URL of the site a user can share.
   - **Tweet Text**: The text of a tweet about the page.
   - **Via @**: The Twitter user account used for the tweet.
   - **Recommend @**: The Twitter user account used for a Twitter recommendation.
   - **Hashtag #**: A hash tag you'd like used for the post.
   - **Count**: A display of the Share count, either vertical or horizontal.
   - **Large button**: Choose either a large or smaller button for the app.
5. Use the General tab to modify spacing, alignment, and other presentation options.
6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

How do I use Twitter follow?

You can add a Twitter Follow button to let viewers easily follow a Twitter user.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the app and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Twitter Follow Settings** to set the Twitter user name and to choose whether to show the user name and to choose the size of the **Follow** button.
5. Use the General tab to modify spacing, alignment, and other presentation options.
6. Use the Style tab to format the frame that contains the app with predefined styles or with your own custom choices.

How do I use a conversation component?

You can use a conversation to promote discussion about a topic directly from your site.

> **Note:**
>
> For a conversation to work on a site, the site must be a secure site limited to specified users or limited to users with the Content and Experience Cloud Users role. See How do I change site security?

To add a conversation component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to select a conversation and to select a presentation color scheme.
5. Click **Select** next to **Choose Conversation** to select an existing conversation or to create a new one.
   a. Select a conversation from the list of available conversations or click **Create** to create and name a new conversation.

      The list contains all the conversations to which you have access.
      You can filter the list:

      - **All**: Shows all conversations except those that are marked as muted.
      - **Favorites**: Shows conversations that have been marked as favorites.
      - **Muted**: Shows conversations that have been muted and excluded from your list of conversations.
      - **Closed**: Shows all conversations that are marked as closed.

      You can also sort the list:

      - **Last Updated**: List conversations in order from most recently updated to least recently updated.
      - **Name**: Lists conversations in alphanumeric order from lowest to highest.
      - **Unread**: Lists unread conversations first in order of the conversation with the most unread comments to the conversation with the least number of unread comments.

   b. Click **Back** when you are done.
   c. If you selected an independent conversation (one not based on a file or folder), you can set the access permission for people viewing the conversation.

d. Select a **Color Scheme**.

e. To use the conversation component in conjunction with a conversation list component on the page, select **Auto-refresh conversation based on selection in the conversation list component**.

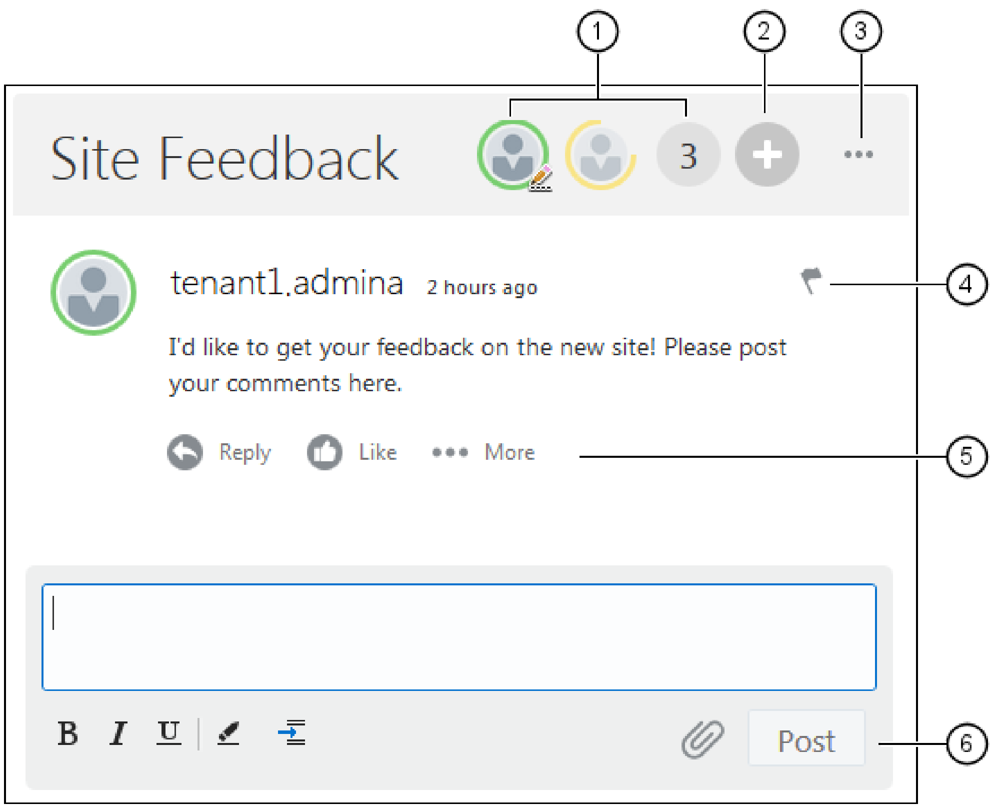
   When a user selects a conversation from the list, it displays in the conversation component.

f. When you are done, close the window

6. Use the General tab to modify spacing, alignment, and other presentation options.
7. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

On the published site, visitors will see the conversation in a frame on your site. Users can navigate within the conversation to read and respond to comments.

> **Note:**
>
> If the visitor has not been explicitly added as a member of the conversation, they will have the ability to read and reply to comments, but they will not see items 1 through 4 in the image below.



- The **menu bar (1)** has information about individual participants in the conversation. Click a user icon to get status information and to see options for working with the user. The number icon shows the total number of participants. Click the icon to see the complete list.

- Click **Add Users (2)** to add users to the conversation.
- Click **More Options (3)** to see a list of options for working with the conversation. The list of options varies with the role of the user. For conversations associated with folders and files, The list of options also depends on the permissions set on the folder or file.
- Click **Flags (4)** to alert a particular user by assigning them a notification flag. The user is alerted by email as specified in their preferences.
- Use the **comment options (5)** to perform actions on a particular comment in the conversation such as replying to the comment, or liking, editing, or deleting the comment.
- When you add or edit a comment, use the **edit options (6)** to add or remove basic formatting such as bold or underlining, add an attachment, and post the comment to the conversation. Unless the site visitor is a member of the conversation, they won't be able to add attachments.

For details about using conversations, see Using Conversations to Collaborate.

How do I use a conversation list?

You can use a conversation to promote discussion about a topic directly from your site.

If you use this component in conjunction with one or more conversation list components on the page, the conversation list component can automatically display the contents of a conversation selected in the conversation list.

> **Note:**
>
> For a conversation or conversation list to work on a site, the site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Users role. See How do I change site security?

To add a conversation list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to select conversations and to select display options.
5. Specify a title. The default title is Conversation List. You can choose to display or hide the title by selecting or deselecting the **Title** display option below.
6. Click **Add** next to the list of conversations to add an existing conversation or to create a new one.

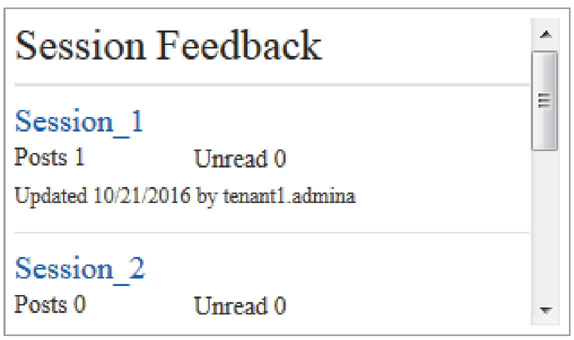
a. Select one or more conversations from the list of available conversations or click **Create** to create and name a new conversation.

b. Click **Back** when you are done.

c. Choose the permissions allowed for those who view the conversation list.

7. To organize the conversation list, select a conversation and click **Move Up** or **Move Down** to change its location in the list order or click **Remove** to remove the conversation from the list.
8. Select a **Color Scheme** and chose additional **Display Options**. The display options you select are shown below the name of the conversation in the list.
9. When you are done, close the window.
10. Use the General tab to modify spacing, alignment, and other presentation options.
11. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

The following image shows a conversation list titled *Session Feedback* with all display options selected.



For details about using conversations, see Using Conversations to Collaborate.

Process Components

Process components let site users initiate and manage tasks for pre-defined processes.

> **Note:**
>
> To use process components, you must use Oracle Process Cloud Service release 17.1.3 or later.

- How do I use a process start form?
- How do I use a process task list?
- How do I use a task detail form?

How do I use a process start form?

You can use a process start form to initiate a process defined with Oracle Process Cloud Service.

> **Note:**
>
> For a process start form to work on a site, the following must be true:
>
> - The associated processes and process start forms must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Processes in *Using Oracle Process Cloud Service*.
> - To use the process start form, the user must be assigned the role associated with the process swimlane that contains the start form.
> - The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See How do I change site security?
> - An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrating with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a process start form component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Select a partition for the start form. You can choose between a Test partition (for testing) or a Production partition (for finished work)
5. Choose **Custom Settings** to select a process start form and to set form defaults. You can set name and value pairs to pre-populate the start form. The name is one of the form fields, not a label used on the form, and the value is what is allowable for that field. You can use the special values of `%%username%%` and `%%userid%%` to insert the current logged-in user data in a value.
6. Select the partition for the start form. You can use the Test partition to verify that the process is working as planned or the Production partition to deploy the process for general use.
7. Click **Select a start form** to choose a pre-defined start form. Forms have the following syntax: `process type:version:processname:start`. For example, `Basic Approval:1.0:Process:Start Basic Approval`.

> **Note:**
>
> - If a message at the top of the window states “No Process Cloud Service connection”, it’s possible that the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud is not configured. Contact your administrator.
> - The process author must add you as an initiator of the process to see it in the list.
> - The process author must add all site visitors as initiators of the process or the visitors will be able to complete the form, but not initiate the process.

8. Choose from the following to set additional defaults for the form.
   - **Form title**: Optionally replace the default form title with a title of your own.
   - **Submit button name**: Optionally rename the **Submit** button with a value you specify.
   - **Show Submit button**: Optionally show or hide the **Submit** button on the component (it’s shown by default). You might hide the component **Submit** button if a similar button is provided on the form itself.
   - **Submit confirmation**: Optionally replace the default confirmation message with a message of your own.
   - **Show submit confirmation**: Optionally show or hide the confirmation message when the **Submit** button is clicked. It’s shown by default and displays within the process start form component.
   - **Show Save button**: Optionally show or hide the **Save** button on the component (it’s hidden by default). You might show the component **Save** button if the associated process allows you to save your work and return to it later.
   - **Show Discard button**: Optionally show or hide the **Discard** button on the component (it’s hidden by default). You might show the **Discard** button if you want to allow the user to discard the form content and start over.
   - **Show Attachments**: Optionally show or hide an **Attachments** area on the form with ability to upload a file or files (it’s hidden by default). Files uploaded are stored as part of the process in Oracle Process Cloud Service.
9. Use the General tab to modify spacing, alignment, and other presentation options.
10. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.
11. Use the Links tab to assign actions to the triggers provided by the component:
    - **Start form submitted**: This trigger occurs when the user clicks the **Submit** button.
    - **Start form saved**: This trigger occurs when the user clicks the **Save** button.
    - **Start form discarded**: This trigger occurs when the user clicks the **Discard** button.

    Click the trigger to assign an action.

Note:

You can add a conversation component to the page and assign any of the triggers to display process information in the conversation component. To use the conversation component for messaging in this way, do not select a conversation to display. The process associated with the start form assigns the conversation as part of the trigger. Just select the trigger and assign the conversation's Display Conversation action with Conversation Id as the payload. For more information about assigning triggers and actions, see How do I use triggers and actions?

How do I use a process task list?

You can use a process task list to selectively list processes defined with Oracle Process Cloud Service. You can show detailed information for the tasks in the task list component, or use the process task list component in conjunction with a task detail component to simplify the list and to show detailed information for a selected task only.

Note:

For a process task list to work on a site, the following must be true:

- The associated processes must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Processes in *Using Oracle Process Cloud Service*.
- The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See How do I change site security?
- An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrating with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a process task list component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to set display options and to filter the available tasks.
5. Choose from the following to set display options for the task list.

> **Note:**
>
> You can set display options for the component, but the presentation of the tasks themselves is determined by the design in Oracle Process Cloud Service.

- **Show Details**: Select to include task detail information in the task list itself. Use the process task list component in conjunction with a task detail component to simplify the list and show detailed information for a selected task only.
- **Show Search**: Select to include the search bar at the top of the task list. If you select **Show Search**, you have the additional option of selecting **Show Filter** to include the filter option in the search bar. Use the filter options below to set the default filter values.
- **Show Select All**: Select to allow the user to select all the displayed task for processing.
- **Page Size**: Adjust to specify the maximum number of tasks to display. If there are fewer tasks than the specified maximum, the component automatically adjusts to the smaller number. If there are more tasks than the specified maximum, the component shows the maximum number and adds links to the additional page or pages.

6. Choose from the following to filter the available tasks in the list.

   The filters you apply determine the initial list of tasks. If you choose the **Show Search** and **Show Filter** options above, the user can adjust the settings to modify the filter for all settings except **From User**.

   - **Search Keywords**: Optionally specify one or more search terms. Search results include only those tasks with titles that include all of the specified keywords. If you selected **Show Search**, these keywords are displayed in the search bar and can be removed or modified by the user.
   - **Status**: Select one of the available Status values. The default is **Assigned**.
   - **Assignee**: Select one of the available Assignee values. The default is **Me and My Group All** which includes all tasks available to the user and their group, including those that are claimed but not workable.
   - **From User**: Optionally select one or more users from whom the task originates. Begin typing the user name to initiate a search of the available users on the associated Oracle Process Cloud Service. The values you specify are not displayed to the end-user and can’t be removed. Users can add additional user names to further expand the list of users.
   - **Due Date**: Optionally select a due date that is On, Before, After, or Between a date selected from the calendar.
   - **Application**: Optionally select the name of a particular application. You can select one or more applications from the list of applications available to the user.

7. Use the General tab to modify spacing, alignment, and other presentation options.
8. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

Note:

If you have a process task list and a task detail form on the page, the task detail component automatically displays the detail for a task selected from the list. For more information about triggers and actions, see How do I use triggers and actions?

How do I use a task detail form?

You can use a task detail form in conjunction with a process task list to display details for a selected task. If you have a process task list and a process detail form on the page, the process task detail component automatically displays the detail for a task selected from the list.

Note:

For a task detail form to work on a site, the following must be true:

- The associated processes must be defined with Oracle Process Cloud Service before you can display them with this component. See Developing Processes in *Using Oracle Process Cloud Service*.
- The site must be a secure site limited to specified users or limited to users with the Oracle Content and Experience Cloud User role. See How do I change site security?
- An administrator must set up the integration between Oracle Process Cloud Service and Oracle Content and Experience Cloud. See Integrating with Oracle Process Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

To add a task detail component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Choose **Custom Settings** to set display options.
5. Choose from the following to set display options for the task detail form.

> **Note:**
>
> You can set display options for the component, but the presentation of the task detail is determined by the design in Oracle Process Cloud Service.

- **Show Actions**: Select to display the actions available to the user, such as Approve, Reject, and so on.
- **Show Save**: Select to display the **Save** button.
- **Show Close**: Select to display the **Close** button.
- **Show Attachment**: Select to display the **Attachment** section in the detail form.
- **Show Comments**: Select to display the **Comments** section in the detail form.
- **Show History**: Select to display the **History** section in the detail form.
- **Show More Information**: Select to display the **More Information** section in the detail form.
- **Show Links**: Select to display the **Links** section in the detail form.

6. Use the General tab to modify spacing, alignment, and other presentation options.

   By default, the task detail component expands to display all the specified detail. Click **Set Height** and adjust the height value to set a specific height.
7. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.
8. Use the Links tab to assign actions to the triggers provided by the component:
   - **Task details submitted**: This trigger occurs when the user clicks the **Submit** button.
   - **Task approved**: This trigger occurs when the user clicks the **Approve** button.
   - **Task rejected**: This trigger occurs when the user clicks the **Reject** button.
   - **Task closed**: This trigger occurs when the user clicks the **Close** button.
   - **Task saved**: This trigger occurs when the user clicks the **Save** button.
   - **Task comment added**: This trigger occurs when the user adds comment text and clicks the **Post Comment** button.

   Click the trigger to assign an action.

> **Note:**
>
> The process task list component does not support manual triggers or actions, however if you add a task detail component to the page, it automatically displays the detail for a task selected from the list. For more information about triggers and actions, see How do I use triggers and actions?

For information about using Oracle Process Cloud Service, see Getting Started with Oracle Process Cloud Service.

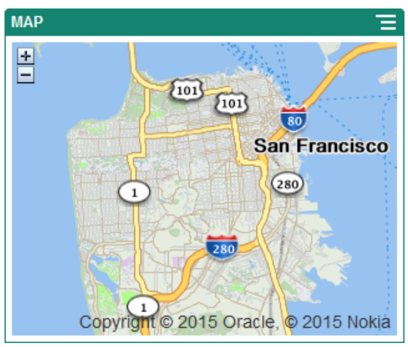
Other Components

Let's look at some components that combine different type of content.

- How do I use maps?
- How do I use a headline?
- How do I use an article?
- How do I use an image with text?
- How do I use a component group?
- How do I use Cobrowse on a page?
- How do I use Oracle Policy Automation?
- How do I use Oracle Visual Builder Cloud Service?

How do I use maps?

Add a map to your site to let users interactively explore the area around a location.



To add a map to the page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The Oracle map component shows a default location.
3. To change the location for the map and to adjust its display properties, click its menu icon and choose **Settings**.
4. Enter the starting **Location** for the map. You can use an address, zip code, or comma-separated latitude and longitude (for example, 40.5,-57.6)

   If you use an address, make sure you provide enough information to match a single location. If the address matches more than one location, the map remains blank.
5. Specify an initial **Zoom** level for the map. You can optionally allow the user to adjust the zoom level using a mouse, track pad, or on-screen controls.
6. Specify any style, alignment, and display options:

- **Zoom**: Enable on-screen and device options to allow the user to adjust the zoom level of the map.
- **Pan**: Enable on-screen and device options to allow the user to move the area of focus of the map.
- **Display Marker**: Mark the starting location with a pin icon.
- **Scale**: Include an indicator that shows the scale of the current zoom level.
- **Overview**: Include an inset map that shows the current view in a larger context.

How do I use a headline?

You can add a headline to call attention to a certain spot on the site with title text and a supporting image and paragraph.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the different areas of the component to add text. You add content to the main headline and the paragraph below the main headline. The text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.
4. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.
5. To remove the formatting applied with these options, select the text and click .
6. To edit the component and its appearance, click its menu icon , and choose **Settings**.
7. Choose **Components** to set the details about the content that's displayed.
   - **Image**:
     – Click **Select** to use an image in the headline. You can use images stored in Oracle Content and Experience Cloud or in another repository you can access. You can also use images that have been shared with you or that you upload from a local or network file location (see How do I upload files?). Select an image and click **OK**
     – **Title**: Enter text you'd like to have displayed in a tooltip.
     – **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.
     – **Caption**: Enter a caption that appears under the image in the headline.
     – **Alignment, Width, and Spacing**: Change the layout of the image as needed.
   - **Title**: Change the alignment, width, spacing, and other layout options for the headline text.
   - **Paragraph**: Use these options to change the layout of the text that appears under the main headline.

8. Use the General tab to modify spacing, alignment, and other presentation options.
9. Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

How do I use an article?

You can add an article to your site, which combines the components of a headline, paragraph, and image in one easy-to-use component.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the different areas of the component to add text. You add content to the article headline and a sub-head below that. Then you can add the text of your article below the sub-heading. All text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.
4. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.
5. To remove the formatting applied with these options, select the text and click .
6. To edit the component and its appearance, click its menu icon , and choose **Settings**.
7. Choose **Components** to set the details about the content that's displayed.
   - **Image**:
     - Click **Select** to use an image in the headline. You can use images stored in Oracle Content and Experience Cloud or in another repository you can access. You can also use images that have been shared with you or that you upload from a local or network file location (see How do I upload files?). Select an image and click **OK**
     - **Title**: Enter text you'd like to have displayed in a tooltip.
     - **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.
     - **Caption**: Enter a caption that appears under the image in the headline.
     - **Alignment, Width, and Spacing**: Change the layout of the image as needed.
   - **Title**: Change the alignment, width, spacing, and other layout options for the headline text.
   - **Paragraph** (sub heading) and **Paragraph**: Use these options to change the layout of the text that appears under the main headline.
8. Use the General tab to modify spacing, alignment, and other presentation options for the component.
9. Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

How do I use an image with text?

You can add use the image and text component which combines the components of a paragraph and an image in one easy-to-use component.

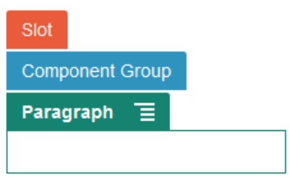
1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. Click in the paragraph area of the component to add text. All text takes on the formatting of the default style for the component. Press Enter to add additional lines of text.
4. If you want to change the default formatting for any portion of text, select the text that you want to format, then select any of the options in the formatting tool bar, such as font, color, or alignment.
5. To remove the formatting applied with these options, select the text and click .
6. To edit the component and its appearance, click its menu icon , and choose **Settings**.
7. Choose **Components** to set the details about the content that's displayed.
   - **Image**:
     – Click **Select** to use an image in the headline. Select an image and click **OK**. You can use images from the Oracle Content and Experience Cloud repository or another repository you can access. You can also use images that have been shared with you or that you upload from a local or network file location. See How do I upload files?
     – **Title**: Enter text you'd like to have displayed in a tooltip.
     – **Alternate Text**: Enter the alternate text that will be displayed for accessibility purposes.
     – **Caption**: Enter a caption that appears under the image in the headline.
     – **Alignment, Width, and Spacing**: Change the layout of the image as needed.
   - **Paragraph**: Use these options to change the layout of the text that appears under the main headline.
8. Use the General tab to modify spacing, alignment, and other presentation options for the component.
9. Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders.

How do I use a component group?

You can combine one or more components to create a component group that you can name and reuse.

When you save a component group, the component group is saved as a custom component with the name you give it and it then appears in the list of custom components in the editor.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add a component group to the page. The component group is identified by . See How do I add content to a page?
3. Drag and drop one or more components into the frame of the custom component.
4. Position and size the components within the component group in the same way you do for components in a slot.
5. To edit a component and its appearance, click its menu icon , and choose **Settings**. If you click the component name instead of the menu icon, you can see and select the menu icon for the component group (or slot):

   The Settings tab for the component group lets you specify the position of the component group, a background image, and other settings that apply to the entire component group.
6. When you are ready to save your changes to the component group, click the component group, click its menu icon , and choose **Save**.
   a. In the dialog, enter a name for the component group. You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with a hyphen.

      If this is a new component group, you cannot use the name of an existing custom component.
      If you added an existing component group to the page, modified the component group, and then tried to save your changes, you are given the option to provide a name to create a new component group to select **Overwrite the existing component group** to update the existing component group with your changes.
   b. Click **Save**.

      The component group is saved with the specified name as a custom component. It appears in its own folder in the component manager and in the list of custom components in the editor if you are the owner or someone has shared the component with you. You can share the component group as you would any custom component.

How do I use Cobrowse on a page?

The Oracle Cobrowse Cloud Service is a collaboration tool that lets you share screens or initiate a cobrowsing session with another person. For example, you may want to include this on an order form so a representative can view a customer's screen while the customer is placing an order.

To use this feature, it must first be enabled for a site. There are two types of launcher scripts that can be enabled: one that uses a customized button (Launch Point 2) and one that uses the default Cobrowse button (Launch Point 1). You determine which kind of launcher will be used when you enable the feature for your site and add the necessary script. See How do I enable Cobrowse to work with a site? for details.

After Cobrowse is enabled for a site, any page can be configured to allow cobrowsing.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Click . Select the checkbox in the Cobrowse section.
3. Click **Close**.

If a Launch Point 1 script is enabled, when you next view the page, you'll see the default Cobrowse button appear or after pressing a hot key, if configured.

If a Launch Point 2 script is enabled, you need to add the custom button to the page.

1. Make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?. The Cobrowse Launcher component is listed in the Integration section of the components.
3. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can adjust the label for the button, its appearance, size, and alignment. Use the Style tab to add formatting around the text and to customize the background color, fonts, and borders. For more advanced styling, edit or add style classes in the `design.json` and `design.css` files in the theme designs folder of current site template. The style class prefix is `scs-cobrowse`.

After your site is published, your site visitors can use the Cobrowse button to initiate a session with a representative from your organization. The visitor clicks the Cobrowse button and is given a secure session ID. The visitor relays the ID via a phone call to a representative from your organization who has access to the Cobrowse Agent Console. The agent uses the console to initiate a session, which continues until either the visitor or the agent terminates it. When using a Launch Point 2 setting, the Launcher component has a fixed ID of cec-start-cobrowse. Use that ID in the Cobrowse console.

Notes on Usage

When using Cobrowse Instant Mode (ICB), video or embedded iFrames are not viewable on a page unless the iFrame content is enabled with the same Cobrowse site

ID. As a result, some Content and Experience Cloud components are not rendered in the Cobrowse agent console in ICB mode. Use Cobrowse Advanced Mode (ACB) to render the following components:

- Video
- Youtube
- Document Manager
- Facebook Like
- Twitter Follow
- Twitter Share
- Facebook Recommend
- Conversation

A custom component that uses an iFrame to get content also does not render in Instant Mode.

See Cobrowse Overview in the *Cobrowse Deployment and Use Guide* for more information about Oracle Cobrowse Cloud Service. See How do I enable Cobrowse to work with a site? for details about using Cobrowse with a secure site or one under development.

How do I use Oracle Policy Automation?

Oracle Policy Automation is used to implement online ‘interview” scenarios, such as feedback for troubleshooting or eligibility assessments for services. It delivers advice across channels by capturing rules in natural language Microsoft Word and Excel documents, then building interactive customer service experiences called interviews around those rules.

Before you can use the Oracle Policy Automation feature, it must be configured and enabled. Your service administrator enables the feature for your service, including adding the host name, URL, user name, and password for the Oracle Policy Automation hub in use. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

On the Oracle Policy Automation side, interviews must be created and stored on the host site. In addition, your Oracle Content and Experience service must be authorized for use by the Oracle Policy Automation host.

Once Oracle Policy Automation is configured and enabled, you can add an OPA component to a page on your site.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The component appears in the Integration section of the Component list.
3. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can adjust the label for the component, its appearance, size, and alignment. Use the Style tab to use the default style associated with the interview from the Oracle Policy Automation host. For more advanced styling, edit or add

style classes in the design.css files in the theme designs folder of the current site template. The style class prefix is scs-opainterview-.

After your site is published, your site visitors will see the interactive interview that is chosen in the Oracle Policy Automation component. For more details about Oracle Policy Automation, see the Oracle Policy Automation library documentation.

How do I use Oracle Visual Builder Cloud Service?

Oracle Visual Builder Cloud Service is a hosted environment for your application development infrastructure. It provides an open-source standards-based solution to develop, collaborate on, and deploy applications within Oracle Cloud.

Initial Steps

Before using Oracle Visual Builder Cloud Service, it must be enabled and configured. Your service administrator enables the feature for your service, including adding the host name for where the apps are created and stored. See Integrating with Oracle Visual Builder Cloud Service in *Administering Oracle Content and Experience Cloud*. The integration between the two services requires SSO sign-ons, so both services must be in the same identity domain.

On the Oracle Visual Cloud Service side, the following must be done before this feature can be used with Oracle Content and Experience Cloud Service:

- Cross-Origin Resource Sharing (CORS) must be enabled on the Oracle Visual Cloud Service site.
- Apps must be created and made available for embedding.
- The apps must be configured for use with Oracle Content and Experience Cloud.

Create VBCS Components

After the integration is enabled and apps are created and ready to use, you must create a new component for each app that you want to add to your site pages.

1. On the home page, click  and click the **Experience** tab to view options.
2. Click . Registered remote components and layouts are displayed.
3. Click **Create** and choose **Create VBCS Component**.
4. Enter a name for the component. You can't use a name used by another component or layout.

   You can use letters, numbers, underscores (_), and hyphens (-). If you enter a space, it's automatically replaced with an underscore.

   Don't use the following names for templates, themes, components, sites, or site pages:

   - authsite
   - content
   - pages
   - scstemplate_*
   - _comps

  - _components
  - _compsdelivery
  - _idcservice
  - _sitescloud
  - _sitesclouddelivery
  - _themes
  - _themesdelivery

  Although you can use the following names for site pages, don’t use them for templates, themes, components, or sites:

  - documents
  - sites

5. Optionally, enter a description for the component.
6. Select the app to use with the component. The apps shown in the dropdown list are those that are available on the VBCS site that was configured to work with your service.
7. Click **Create**. After the component is created, the name appears in the list of components. You can explore the folders and files that make up the component or layout by clicking the component name in the list .
8. To select an icon other than the default icon assigned to the component:
   a. Select the component from the list.
   b. Click **Properties**
   c. Click the **Component Logo** tab.
   d. Click a logo from the gallery of logos and then click **Done**.

Adding the Component to a Site Page

Now you can add the component for the app to one of your site pages. You can add the component to either a public or a secure page.

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page? The component appears in the Custom section.
3. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can adjust the label for the component, its appearance, size, and alignment. Use the Style tab to use the default style associated with the interview from the Oracle Policy Automation host. For more advanced styling, edit or add style classes in the design.css files in the theme designs folder of current site template. The style class prefix is scs-opainterview-.

You can view the component in preview mode while editing your site. After your site is published, your site visitors see the Oracle Visual Builder Cloud Service app chosen for use with that component, running in an iFrame on the page.

Section Layouts

A section layout automatically organizes content added to it, making it easy for a contributor to add content without spending time formatting it on the page.

- How do I use a horizontal section layout?
- How do I use a vertical section layout?
- How do I use a two-column section layout?
- How do I use a three-column section layout?
- How do I use a tabbed section layout?
- How do I use a slider section layout?

How do I use a horizontal section layout?

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

A horizontal layout arranges the items added to it one after the other in a horizontal line. The layout changes proportionally as the page width is increased or decreased. By default, items are fit into one line and are allocated equal horizontal space.

To add a layout to a page:

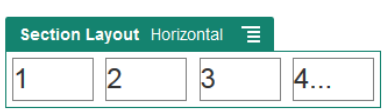
1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page?
3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts.

   The following is a horizontal layout with numbered text components to show the sequence of items in the layout:

4. To edit the component and its appearance, click its menu icon , and choose **Settings**. You can set the width for individual areas if you don’t want to use the default proportional sizing. You can also set the alignment (left, center, or right).
5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.
6. Use the Background tab to modify background settings for the layout.

   See How do I change the background?

How do I use a vertical section layout?

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

A vertical layout arranges the items added to it one after the other in a vertical line.

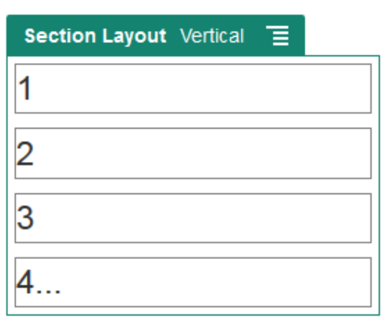
To add a layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page?
3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts.

   The following is a vertical layout with numbered text components to show the sequence of items in the layout:



4. To edit the component and its appearance, click its menu icon , and choose **Settings**.

5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.

6. Use the Background tab to modify background settings for the layout.

   See How do I change the background?

How do I use a two-column section layout?

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

To add a layout to a page:

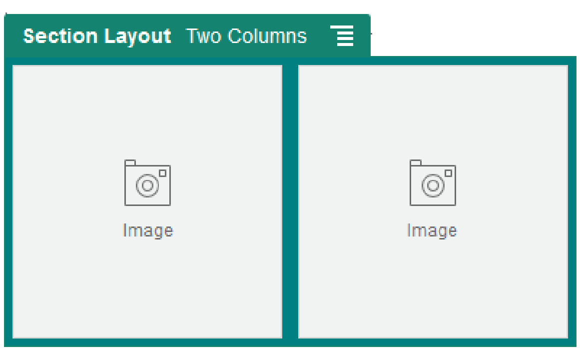
1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page?
3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts or add component groups.

   The following is a two-column layout with image components as placeholders:

   If you add more items, they are shown in additional rows, each with a maximum of two items.

4. To edit the component and its appearance, click its menu icon , and choose **Settings**.
5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.

6. Use the Background tab to modify background settings for the layout.

See How do I change the background?

7. Choose **Custom Settings** to set additional defaults for the content that's displayed.
   - **First Column Width (%)**: Specify the column width as a percentage of the space available to the layout.
   - **Second Column Width (%)**: Specify the column width as a percentage of the space available to the layout.
   - **Responsive Breakpoint (in pixels)**: For responsive page designs that automatically reformat the content when the available display size varies, specify the width in pixels where the section layout switches between the standard two-column layout and the **Responsive Behavior** options you specify below.
   - **Responsive Behavior**: Select how the layout changes when the available display size is smaller than the **Responsive Breakpoint** value.
     – **No Action**: Do not adjust the layout behavior.
     – **Hide the first column**: Hide the content in the first column to provide more space for the remaining columns.
     – **Hide the second column**: Hide the content in the second column to provide more space for the remaining columns.
     – **Hide both columns**: Hide all the content in the layout.
     – **Move the second column under the first column**: Arrange items in a single column with all items from column one followed by all items from column two.
     – **Move the first column under the second column**: Arrange items in a single column with all items from column two followed by all items from column one.

How do I use a three-column section layout?

You can use a section layout to automatically determine the spacing and arrangement of components you add to the layout.

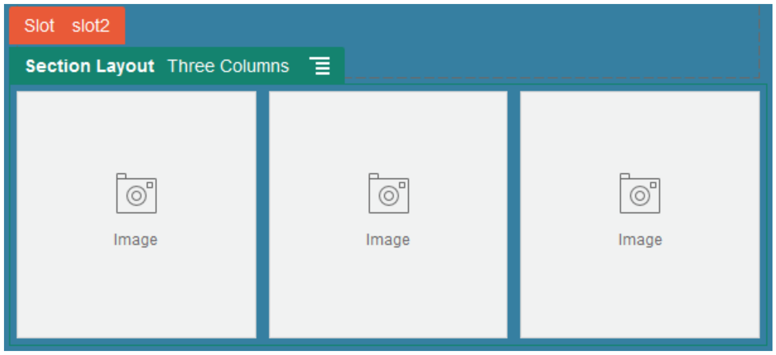
To add a layout to a page:

1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page?
3. To place other content in the section layout, drag and drop the content onto the layout.

   The layout highlights with a solid border and a banner that shows Add Item.

You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts or add component groups.

The following is a three-column layout with image components as placeholders:



If you add more items, they are shown in additional rows, each with a maximum of three items.

4. To edit the component and its appearance, click its menu icon , and choose **Settings**.
5. Use the General tab to modify settings for the individual components in the layout.

   Click a component name to see the settings for that component.
6. Use the Background tab to modify background settings for the layout.

   See How do I change the background?
7. Choose **Custom Settings** to set additional defaults for the content that's displayed.
   - **First Column Width (%)**: Specify the column width as a percentage of the space available to the layout.
   - **Second Column Width (%)**: Specify the column width as a percentage of the space available to the layout.
   - **Third Column Width (%)**: Specify the column width as a percentage of the space available to the layout.
   - **Responsive Breakpoint (in pixels)**: For responsive page designs that automatically reformat the content when the available display size varies, specify the width in pixels where the section layout switches between the standard three-column layout and the **Responsive Behavior** options you specify below.
   - **Responsive Behavior**: Select how the layout changes when the available display size is smaller than the **Responsive Breakpoint** value.
     - **Stack the columns**: Arrange the items from top to bottom in a single column with all items from column one, followed by items from column 2, and so on.
     - **Hide the first column**: Hide the content in the first column to provide more space for the remaining columns.

- **Hide the second column**: Hide the content in the second column to provide more space for the remaining columns.
- **Hide the third column**: Hide the content in the third column to provide more space for the remaining columns.

How do I use a tabbed section layout?

You can use a tabbed section layout to create spacing and arrangement of the components you add into the layout.

To add a layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page? By default, a single tab is added with the layout. Click **New Tab** to add additional tabs.
3. To place other content in a tab, drag and drop the content onto the tab.

   You can continue adding items to the layout and the layout will format them accordingly. You can even add other section layouts to create sophisticated layouts or add component groups.
4. To edit a tab and and its appearance, click its menu icon , and choose **Settings**.
5. Use the Background section to modify background settings for the tab.

   See How do I change the background? You can use an image for the tab, change its position, and so on.
6. Use the Style section to modify other appearance settings for the tab. Choose a style, such as hairline, frame, and so on, or customize the border and the corners for the tab.

How do I use a slider section layout?

You can use a slider section layout to create content that remains in place until it is “slid” to one side, making room for new content. Users navigate through the slides by clicking the navigation dots under the slide section.

To add a slider layout to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the layout to the page. See How do I add content to a page? By default, a single slide is added with the layout. Click **New Slide** to add additional slides.
3. To place content on a particular slide, display the slide in the slider, then drag and drop the component or content item onto the slide.

   You can continue adding items to the slide and positioning them as needed. You can add other section layouts to create sophisticated layouts or add component groups, letting you position content where you want.

4. To edit a slide layout and its appearance, click its menu icon , and choose **Settings**.
5. Use the Background section to modify background settings for the entire slide area.

   See How do I change the background? You can use an image, change its position, and so on.
6. Use the Style section to modify other appearance settings. Choose a style, such as hairline, frame, and so on, or customize the border and the corners for the slide.
7. To modify settings for each individual slide, click the name of the slide to open its settings. Change the background, style, and so on for each slide as needed.

Content Items

For enterprise users, every site has a collection that contains digital assets and content items associated with the site. Content item components make it easy to add items to your site.

You can drag and drop digital assets and content items directly from the Content panel in the editor and the appropriate component is automatically used, whether for an digital asset image or for a structured content item.

Additional components selected from the Component panel let you dynamically display content items based on the content type.

- How do I use a content item component?
- How do I use a content placeholder component?
- How do I use a content list component?
- How do I use a content search component?

How do I use a content item component?

As a enterprise user, you can use a content item component to help lay out a page and set up page interactions until you are ready to add the content items themselves.

When you drag and drop a content item from the Content panel onto a page, it automatically inserts a content item component to hold the item. If you add the component first, you can drag the content item from the Content panel onto the component at a later time.

To add a content item component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Use the General tab to modify spacing, alignment, and other presentation options.

If a content item is assigned to the component, a thumbnail view of the content items is shown. If no content item is assigned yet, a placeholder image and message is displayed.

5. Choose from the following to set additional defaults for the content that's displayed.
   - **Version to use**: If you select **Use latest version of asset** and there is a newer, unpublished version of the content item, the newer version will be published automatically when the current site update is published. Unless specifically requested, all items will be the draft or latest versions.
   - **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout. See How do I create a local component or layout?
   - **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

     Note:

     If you do not create a detail page, the link to display details is not shown for the content item in the default layout. See How do I add a page?
6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

How do I use a content placeholder component?

As a enterprise user, you can use a content placeholder component to dynamically display content items of one or more types.

For example, you can use a content item placeholder on a designated detail page and when a user clicks a link to get more detailed information for a particular content item, it will automatically load the detail view for the associated content item. For example, if there is a page with multiple articles, each with a headline and image, and the user clicks a particular article, the detail page displays the full article regardless of which article is chosen.

To add a content placeholder component to a page:

1. Navigate to the page you want to edit and make sure that  is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Use the General tab to modify spacing, alignment, and other presentation options.
5. Choose from the following to set additional defaults for the content that's displayed.

- **Content Type**: Select one or more of the available content types. The content types are those of the content items in the site collection.
- **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout. See How do I create a local component or layout?
- **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

> **Note:**
>
> If you do not create a detail page, the link to display details is not shown for the content item in the default layout.

6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

How do I use a content list component?

As a enterprise user, you can use a content list component to dynamically display content items of a particular type.

For example, you can use a content item placeholder on a designated detail page and when a user clicks a link to get more detailed information for a particular content item, it will automatically load the detail view for the associated content item. For example, if there is a page with multiple articles, each with a headline and image, and the user clicks a particular article, the detail page displays the full article regardless of which article is chosen.

To add a content placeholder component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Use the General tab to modify spacing, alignment, and other presentation options.
5. Choose from the following to set additional defaults for the content that’s displayed.
   - **Content Type**: Select one of the available content types. The content types are those of the content items in the site collection.
   - **Maximum Items**: Specify the maximum number of items to display. Additional items are not displayed.
   - **Show Pagination**: Specify if you want to include pagination options with the list. If selected, you can then tailor the way the pagination is displayed with buttons or page numbers and different labels if needed.

- **Date Created**: Use the options provided to select content items to display based the item creation date before, after, between, or within selected dates or date ranges.
- **Additional Query String** (optional): Specify additional query parameters to further refine the list of items displayed using a syntax similar to: `field:dept:eq=Finance`. Operators include:
  - eq: equals
  - ge: greater than or equal
  - gt: greater than
  - le: less than or equal
  - lt: less than
  - sw: starts with
  - co: contains
  - mt: match phrase
  - mt: wildcard
  - sm: similar
- **Order By**: Sort the items either by name or date in ascending or descending order.
- **Item View**: Select the layout used to display the content item. The supplied **Default** layout shows all fields in the content item. If the content item has other, custom layouts designed for it, you can choose any available layout. See How do I create a local component or layout?
- **Page to display individual item**: If you have designated one or more pages as a detail pages, they are listed here. Choose a page to display detailed information when a user clicks the link on a the content item to view detailed information.

> **Note:**
>
> If you do not create a detail page, the link to display details is not shown for the content item in the default layout. See How do I add a page?

- **List View**: Select a section layout to arrange the items. This list can include custom layouts. The following layouts are provided:
  - **Horizontal**: Arranges the items one after the other in a horizontal line.
  - **Vertical**: Arranges the items one after the other in a vertical line. This is the default if no layout is selected.
  - **Two Columns**: Arranges the items by twos in multiple rows.
  - **Three Columns**: Arranges the items by threes in multiple rows.

  Click the right arrow next to the selected layout to modify settings for the layout. See Section Layouts.

6. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices.

How do I use a content search component?

As an enterprise user, you can use a content search component and specify the actions returned by the search.

You can insert a customized search bar to change or refresh the content that’s displayed on the page or choose another action, such as opening a search results page or displaying an alert.

To add a content search component to a page:

1. Navigate to the page you want to edit and make sure that is set to **Edit**. See How do I navigate to a page?
2. Add the content search component to the page. See How do I add content to a page?
3. To edit the component and its appearance, click its menu icon , and choose **Settings**.
4. Use the General tab to modify placeholder text, spacing, alignment, and other presentation options.
5. Use the Style tab to format the frame that contains the component with predefined styles or with your own custom choices for the font, border, background color, and so on.
6. If you want to use the search component to refresh data on the current page, add a Content List component to the page. Go to **Settings** and pick the content type and any other query information, such as number of items to display, whether to paginate the results, or lazy load on scroll (loading content as the page is scrolled). You can now go to View mode and try out the search.
7. If you want to use the search component to refresh data on the current page and you have more than one Content List component on the page, you’ll need to turn off the auto-query on all content lists except for the one that will display results. Go to the Content List settings and uncheck **Auto-refresh on search query in Content Search component.**
8. If you want to have more than one content search component on a page (with each search component driving a certain content list for results), you must uncheck all auto-refresh options in the Content List components and use Trigger/ Actions to associate the content search component to its respective content list.
9. For the search component, use the Link tab to associate actions with the component. Choose an option from the Select Link Type dropdown list. Select **Trigger Actions** then click **On search query** to see the available triggers or to create a new trigger. Select **Refresh Component**. Under **Query String** select **Search String** and pick the content list to use in the **Do this action in** option.
10. You can also use the content search component to pass the query to a search results page. On the Link tab of the search component, select **Search Page** to display a search result page. You can use the default page or link to a search result page that you created. Select the page from the Page dropdown list and choose the display actions for the page. You can tailor the results to a specific content type, open the results in a new window, and so on.

The following pointers can help you design an effective search results page:

- Create a page and designate it as a search page. By default, it’s marked as hidden, but you can change the setting in the page properties.
- Edit the page and add a content list to the page. You can edit the settings for the content list, specifying a content type. Or the content type can be specified from the search component link settings (above). If you use the link settings, that lets you use a search results page that can show results from different content types, depending on which component is used to initiate the search.
- To edit the display, change the settings, such as choosing lazy load pagination (because the page will probably be used exclusively for search results).
- On the search results page, you can also put in a content search component. This will echo the search string used to launch the page, letting a user refine the search if needed.

16 Troubleshooting

Here's where you'll find some answers to a few frequently asked questions.

General Troubleshooting

- I can't sign in
- I can't move or copy a file
- I don't see digital assets or content items
- I can't upload or download a file
- I exceeded my storage quota but I didn't think I had that many files
- I can't create a folder
- I need to edit a file but it's reserved by someone else
- I don't see the folders that I expected to see in my folder list
- I'm having trouble loading the software
- I'm having trouble viewing a file or video
- There are multiple version numbers after a file name but I only uploaded one version
- URLs copied from a spreadsheet don't paste correctly
- I don't see the results I expected when searching

Digital Assets Troubleshooting

- I don't see any content types
- I see files in my asset view but not my Digital Assets folder
- I don't see the asset or collection I need

Sync Troubleshooting

- I have sync problems or slow syncing
- Files and folders in my Oracle Content folder are wrong or out of date
- Icons in an Oracle Content account folder don't show sync status
- Links in my synced files aren't working
- I exited or quit the desktop app and don't know what's happened to sync
- I can't check for updates
- I can't work with a file on my desktop after I rename it
- I can't change an Oracle Content account folder location
- My files aren't compressed when I add them to a compressed folder
- I don't see a folder to sync or I can't find a synced file

- I can’t restore a folder I deleted

Microsoft Office Add-On Troubleshooting

- Why are there two Oracle Content storage services when using Microsoft Office?
- My Office add-in or Outlook add-in isn’t working
- Links in Outlook email on a Mac don’t work as I expect

Sharing Troubleshooting

- I shared a folder with someone, but they can't use it the way I expected
- Someone sent me a folder link, but I can't access the files there
- I can't get a public link to send to someone in a folder that's shared with me
- Files are missing from one of my folders that I shared
- I can't create a public link to a folder I own
- I have a link to a file or folder but it requires an access code
- I stopped sharing a folder and now the subfolders aren't shared

Mobile Troubleshooting

- What do I do if my device is lost or stolen?
- I can't view a file when I have Viewer rights in a shared folder
- I need to reset my passcode
- I can't view a file that I downloaded
- I’m having trouble viewing a video
- Where are my downloaded files stored?
- My file didn't sync in the Android app
- I got an error when transferring a file during sync in the Android app
- My edits don't appear in a file I synchronized on my Android device

Sites Questions

- I am trying to create a site, but there are no templates
- I can’t delete a site
- I can’t open the site tree or edit a page
- I added a component, but it doesn’t show up on the page
- My folder, file, and conversation components don’t work
- I uploaded a new version of an image, but it doesn’t show up on the page
- I changed the page layout and some of my content disappeared
- I added a component based on another service but it isn’t working

General Troubleshooting

Here are some questions that may come up about working in your browser, your mobile devices, or your desktop app.

- I can't sign in
- I can't move or copy a file
- I don't see digital assets or content items
- I can't upload or download a file
- I exceeded my storage quota but I didn't think I had that many files
- I can't create a folder
- I need to edit a file but it's reserved by someone else
- I don't see the folders that I expected to see in my folder list
- I'm having trouble loading the software
- I'm having trouble viewing a file or video
- There are multiple version numbers after a file name but I only uploaded one version
- URLs copied from a spreadsheet don't paste correctly
- I don't see the results I expected when searching

I can't sign in

If you don't know your service URL or your login information, you can find that information in a welcome information that was sent to you after you were assigned an Oracle Content and Experience Cloud account. Look for an email with the subject line "Welcome to Oracle Content!" Your service administrator may have also sent a separate email with more details. If you're trying to sign in to the desktop app, use the same URL for the service as that which is used to sign in on a browser.

Note the following when logging in:

- Your login information is case-sensitive, so make sure the caps lock key isn't on.
- Check your user name and the URL for your service. This information was sent to you in an email.
- Make sure you have Internet connectivity.
- Your service is set up for specific number of users. It's possible the maximum number of users has been reached.

If you need help resetting your password, see Managing Your Password for details.

If you still can't sign in, contact your service administrator for details about your account or your password. The service administrator is the person in charge of managing the service for your organization.

I can't move or copy a file

You must have the Manager or Contributor role to move items to a shared folder or move items out of a shared folder.

You also may not be able to move a file if its size is larger than allowed or its file type is blocked. Your service administrator (the person who manages Oracle Content and Experience Cloud for your organization) sets any file size and type restrictions.

You must have a Manager, Contributor or Downloader role to copy a file from a shared folder. To copy a file into a shared folder, you need a Manager or Contributor role in the shared folder.

I don’t see digital assets or content items

The digital asset and content items navigation options are only shown if you have an enterprise user role.

If your organization does not have an enterprise edition of Oracle Content and Experience Cloud installed, you won’t see the **Digital Assets**, **Content Items**, or **Collections** navigation option in your browser or your mobile device.

If you see the **Content Items** option but are unable to create a content item, it’s possible that a content type hasn’t been shared with you. In order to create a content item, you need to use a content type. Check with the content administrator who creates content types for your organization.

I can't upload or download a file

Your service administrator sets the maximum file size and types of files that you can upload to the cloud. You'll get an error message if you try to upload a file that's too big or the wrong type, or if you've exceeded your storage quota. You can see the maximum file size and allowed file types on your user preferences page, which you can open from your user menu.

Some browsers can't process very large files when uploading. If that happens, the upload will fail. Try splitting your file into sizes smaller than 5 GB and upload again.

When downloading a file, you must have the Download role in the folder.

If you create a public link to a file that doesn’t pass virus scanning, it can’t be downloaded through that public link.

I can't create a folder

There's a few reasons you may not be able to create a folder:

- If you use invalid characters, like < or /, in the folder name.
- If you use certain reserved words in the name, like NULL, AUX, or other system terms.
- You may not have the right permissions. If you're a member of a shared folder, you need a Contributor or a Manager role to create a folder.

If you can't perform an action, the action isn't available. For example, if you can't create a subfolder, the option to create a folder isn’t shown.

I exceeded my storage quota but I didn't think I had that many files

If you shared folders with others and gave people permission to add content to the folder, that content counts against your storage quota. You may want to check your shared folders to see how much content is stored there. For example, if your folder contains 500 MB of files and after sharing it, other users add another 300 MB of files, then the combined 800 MB counts towards your quota.

You may also have multiple versions of a file, which count against your quota. Check the number of versions you have for your files and see if you can remove some.

I need to edit a file but it’s reserved by someone else

If you need to work on a file that someone else has reserved, you can clear their reservation and an e-mail will notify them. It is still a good idea to contact them when they are available to check if they have made any edits to the document that should be incorporated into your revision.

I’m having trouble loading the software

Some plugins or extensions may interfere with the operation of the software in different browsers. If your access becomes unstable, check the history of usage for your browser to see if any new extensions have been added. Disable all browser plugins and extensions and try again.

I'm having trouble viewing a file or video

You may not be able to view a file because some file formats aren't supported, and those files can't be viewed. For example, a .zip file can't be viewed but if you have adequate permissions (at least the Downloader role), you can download the file for use.

Your service administrator may also have prohibited certain file types, so you won't be able to view those.

File previews are limited to the first 100 pages. The entire file size must be less than 158MB.

Supported video file formats are dependent on your browser, which must support the HTML5 video tag. The currently supported formats are:

- Internet Explorer: MP4
- Chrome: MP4, WebM, and Ogg
- Firefox: MP4, WebM, and Ogg
- Safari: MP4

There are multiple version numbers after a file name but I only uploaded one version

Someone else may change the file if it's stored in a shared folder. If they do that and then upload the changed version, each version of the file is saved. That way, you can compare the different versions and decide which one you want to keep.

I don't see the folders that I expected to see in my folder list

Make sure your listing shows all the items you can view. The page navigation control is at the bottom of the screen, and there may be more than one page of items.

Make sure your list displays all the files and folders you can access. Click the menu next to the heading and select **All Files**. To change your viewing list, click **Shared with You** or **Owned by You**.

If you're looking for a shared folder, it should appear in your folder list with a shared icon. Contact the person who shared the folder to make sure the invitation to share was sent and that the folder is still being shared.

If a folder was shared with a public link, it won't show in your listing as a shared folder. You can only access that folder via the public link.

URLs copied from a spreadsheet don’t paste correctly

When copying a URL from a spreadsheet into a conversation, the URL may exceed the size of the conversation pane and thus not paste correctly. You must first convert the URL to text format to paste it correctly:

1. Highlight the cell containing the hyperlink.
2. Open the hyperlink dialog box.
3. Highlight the entire URL and copy it.
4. Close the hyperlink dialog box.
5. Paste the URL to the desired location.

I don’t see the results I expected when searching

Your search results may not be as expected because of a few different factors.

Check and see if any of these search tips apply to your search:

- A search looks through the titles, the content (such as words in a document), file extensions, the name of the person who last modified the file, and the information about an item (like a folder's description). It also checks any metadata associated with the item, tags for digital assets, conversation messages, hashtags used in conversations, and people in the conversation.
- There may be a slight time delay to show the newest search results. For example, if you search for the term `Report` and then add another document with the term `Report` in it, that newest document will be not be returned in search results for a few seconds.

- If you have more than 100 shared folders (either shared by you or with you), a global search may not return the expected results. The search is done on Favorite shared folders first and then other shared folders, up to 100. You may want to designate some folders as Favorites before searching, to ensure better search results.
- If an item is larger than 10MB in size, it will not appear as a possibility in full-text search (a search through the content of a file, not just the metadata about a file). You can find the item by searching for the entire name.

Digital Asset Troubleshooting

Here are some questions you might have when using digital assets.

- I don’t see any content types
- I see files in my asset view but not my Digital Assets folder
- I don’t see the asset or collection I need

I don’t see any content types

Content types have to be shared with you in order for you to use them.

Content types can be created by anyone who has a content administrator role. After the type is created, it must be shared with others in order for them to use it. If you expect to see a content type but don’t see it in the list when you try to create a content item, contact the person who created the type to make sure that it was shared.

I see files in my asset view but not my Digital Assets folder

If a collection was shared with you, you’ll see those assets in your asset view.

When you select **Digital Assets** from the navigation menu, you see all assets that you can access. This includes any assets from a collection that was shared with you. Those assets won’t appear in your Digital Assets folder. The files in your Digital Assets folder are the ones that you own and manage through your account.

You can find the collection where an asset is managed. Double-click on the asset to view the properties of the item. The collection and any tags associated with the asset are displayed.

I don’t see the asset or collection I need

Your asset view and collection list shows those items you can access.

Digital assets are managed in a collection. A collection can be associated with a website or it can be an independent collection, like one created for a project or event.

The collection manager must share the collection with you in order for you to use the assets in the collection. If you’re expecting to see assets, contact the collection owner and ask to be added as a member to the collection.

Sync Troubleshooting

Here are some questions you might have about using the desktop app.

- I have sync problems or slow syncing
- Files and folders in my Oracle Content folder are wrong or out of date
- Icons in an Oracle Content account folder don't show sync status
- Links in my synced files aren't working
- I exited or quit the desktop app and don't know what's happened to sync
- I can’t check for updates
- I can't work with a file on my desktop after I rename it
- I can't change an Oracle Content account folder location
- My files aren't compressed when I add them to a compressed folder
- I don’t see a folder to sync or I can’t find a synced file
- I can’t restore a folder I deleted

I don’t see a folder to sync or I can’t find a synced file

You must have at least a Downloader role in a folder in order for it to appear in the list of folders available for syncing. For example, if someone shared a folder with you and you’d like to sync it, you must have at least a Downloader role in that folder for you to see it in your list of available folders. Check with the person who shared it with you and request that your role be changed.

If a file is edited or moved on your desktop computer while the file or the folder it’s contained in is modified, the file might be missing from your list of synced files. Check the local trash folder on your desktop computer for the file.

Links in my synced files aren't working

Fixed links (links that include the drive and directory structure of the target document's location, for example `C:\Finance\Sales\sales-report.doc`) probably won't work in synced files because the drive and directory structures of the synced computers are probably not identical.

Relative links (for example, `..\..\sales-report.doc`) should continue to work in synced files, if the linked files are kept in the same locations relative to each other on all computers.

I have sync problems or slow syncing

You probably won't encounter problems with file sync, because the desktop sync client resolves most of them automatically. However, sometimes a more serious underlying cause is found and you may have to intervene to resolve it.

If there is a problem, you might see ⚠ in the notification area or next to a file in your Oracle Content folder.

You can view all problems by selecting **Sync Problems** using one of these methods:

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).
- Click and then click .

The Problems window opens where you see a list of files and problems. Click on one and you'll get an explanation of the problem and a suggestion on how to resolve it. After you make changes, the list may refresh automatically or you can click **Retry** or **Retry All** to clear all problems.

You might get a system error, which is usually a problem with your cloud connection. To see the error, click . An error dialog is shown and there may be a **View Details** link, where you can find out more about the problem.

If you edit a file in a shared folder and someone else reserves the file while you're editing it, a sync error occurs. Your changes won't be saved unless you override the reservation and explicitly save the file from the Problems dialog.

If your sync process is running slowly, your desktop app can be optimized for better performance. Over time, the database that tracks your synced files grows slowly and can reduce productivity. From the menu, click **Help** and then **Troubleshoot**. Click **Optimize** to clear out old data.

File Conflicts

Conflicts happen when a file is changed on more than one computer at the same time. The first version of the file to be saved or uploaded to the cloud is considered the new authentic file, and that file is then synced across all computers and the cloud. One exception to this is if the only change is the file's name. In that case, the new name is applied to the authentic file, and it's synced.

If someone tries to save or upload another version of the file, it's kept in Oracle Content but is given a different name. That file isn't automatically synced across computers.

If you want to sync a version of the file that wasn't the first saved, rename that file yourself. This triggers the desktop app to treat the file like a new one and it will be synced to all computers and the cloud. This new version of the file is kept with the original. You can then decide whether to keep both versions, keep only the latest, or merge the content of the two.

The desktop app doesn't merge the contents of conflicting files for you. Some applications (for example, Microsoft Word) let you compare the contents of files. You can use it to view the differences between two files and decide what material from each file should be kept.

Items Not Syncing

The following types of files or folders aren't synced:

- Hidden files, like system files
- Temporary files (beginning with a tilde (~) or with a .tmp extension)
- Windows shortcuts

- Symbolic links (symlinks)
- Hidden folders
- Encrypted folders on Mac computers
- A file with a name containing any of these characters: | \ / ? " : < > *
- Files known to contain viruses. If a local virus scanner isn't enabled, an infected file is transferred from the Oracle Content folder to the cloud during sync. There it's scanned for viruses and moved to the Trash folder.

Files with file paths exceeding the 247-character limit in Windows will sync, but long paths can cause issues when using Windows. This limit doesn't apply to files in the cloud or on Mac computers.

Windows Briefcase folders are synced as if they were typical Windows folders. The special features of Windows Briefcase folders aren't supported.

I can't change an Oracle Content account folder location

You can change the location of an account folder if you need to, but only to a new location on a local hard drive. Hard drives must use NTFS formatting for Windows computers, or HFS+ formatting for Mac computers. FAT32 formatting isn't supported. You can't use other locations, such as network drives and external hard drives.

Icons in an Oracle Content account folder don't show sync status

The Microsoft Windows operating system limits the number of overlays that can be made to icons in the Windows file system. If you exceed the limitation, you may not see any sync status on your icons. If this happens, your files will still sync as long as the desktop app is still running.

My files aren't compressed when I add them to a compressed folder

Compression of synced files is not supported. You're able to add compressed folders to the Oracle Content folder for sync, but files added to these folders aren't compressed. Sync and sharing does work correctly for such folders.

I can't check for updates

If you install the desktop app, you can typically check for updates at any time by selecting **Check for Updates** from the Help menu.

If the desktop app was installed for you by a service administrator, they may prevent the ability to check for updates. If so, the option in the help menu is disabled.

Files and folders in my Oracle Content folder are wrong or out of date

There are different potential causes for this, and different levels of action that you can take to fix it.

- **Fix by rebuilding your synced folders**

  If changes made in the cloud or on other computers aren't showing correctly on your current computer, it may be because the number and complexity of changes made to folders and files in an Oracle Content folder has caused sync to be permanently lost.

If only one or a few folders are affected, you can rebuild those folders one at a time. This uses sync records from the desktop sync client and from the cloud to rebuild each folder in an Oracle Content folder on the affected computer. To rebuild a single folder, select it from your Oracle Content folder, right-click and select **Oracle Content** and choose **Rebuild Folder**.

- **Fix by deleting the Oracle Content account from your computer**

  If most or all of your folders become unsynced, or if there are other problems that can't be fixed by rebuilding individual folders, you can remove the Oracle Content account from your computer and start over.

  This process will automatically remove the account folder from your computer. All files that were in the cloud will continue to be available from there.

  To remove the account, select **Preferences** using one of these methods:

  – Right-click in the task bar (Windows) or in the menu bar extras area (Mac).

  – Click and then click .

  Select the account to delete and click **Delete**. Deleting an account clears your user account information and deletes the Oracle Content folder on your computer. You must reenter your user account information. You can re-select folders to sync and you can bring those folders back onto your computer by starting sync in the usual way.

I can't work with a file on my desktop after I rename it

There is a limit to how long the combination of file name and path to a file can be on a desktop, which is lower than that in the cloud. If you rename a file in your web browser to a length that exceeds the desktop limit, the file syncs to your computer but you can't rename, edit, or delete it. It's best to avoid lengthy file names. Try to ensure that the length of the combination of path and file name does not exceed 256 characters.

I exited or quit the desktop app and don't know what's happened to sync

If you exit or quit the desktop app on your current computer, changes to files on this computer are no longer synced to other computers, and changes from other computers are no longer synced to this computer. Sync does continue between the cloud and other computers running the desktop app (that is, between the cloud and your other computers, and those of people you are sharing files with).

When you restart the desktop app on your current computer, the files are synced with those in the cloud.

If restarting sync causes a file conflict, you see an error icon overlaid on the app icon in the system trap. Select **Sync Problems** from one of these menus to view any errors.

- Right-click in the notification area (Windows) or in the menu bar extras area (Mac).

- Click and then click .

I can't restore a folder I deleted

When you delete a folder from your cloud account using your browser, that folder is moved to your Trash bin in the cloud and if you're synchronizing that folder, it's also moved to the Recycle Bin on your desktop. If you need to restore the folder, it is easiest to do it from the cloud Trash. However, if you try to restore the folder from your desktop Recycle Bin, the "restore" location is a ".tmp" folder in your desktop account folder, not the original location. Make sure you can view all files, including hidden files, in your account folder and you can then restore the folder by moving it from the temporary location to the location you want.

Microsoft Office Add-On Troubleshooting

Here are answers to questions that may come up about using the Microsoft Outlook or Office add-ons.

- Why are there two Oracle Content storage services when using Microsoft Office?
- My Office add-in or Outlook add-in isn't working
- Links in Outlook email on a Mac don't work as I expect

Why are there two Oracle Content storage services when using Microsoft Office?

If you use Microsoft Office 2013 and 2016, you may see an additional Oracle Content storage service account available. This is caused by a compatibility problem between Microsoft Office 2013 and Microsoft Office 2016. If you attempt to add the second account, an error may result that indicates the Oracle Content add-in is not correctly installed. If you use the same version of the software on all your desktops you won't see this incompatibility.

My Office add-in or Outlook add-in isn't working

The Office add-in radial menu appears when you edit a Microsoft file, such an Excel spreadsheet and it lets you quickly access several menu options. The Outlook add-in lets you add links to conversations and documents in your email using the Outlook toolbar. If these add-ins become disabled, you can re-enable them following these steps:

1. Open any Microsoft file, such as a Word, Power Point, or Excel file.
2. Click **File**, then **Options** and then **Add-Ins**.
3. In the Manage area, make sure **COM Add-ins** is selected and then click **Go**.
4. In the COM Add-Ins dialog, select **Oracle Content Add-In for Office**.
5. Exit and restart your Microsoft program to enable the add-in.

If your Office add-in is enabled but not working, there may be another reason:

- You only see the Office radial menu for files that are being synced using the Oracle Content sync client. Make sure your files are being synced and that the sync app is active.
- Make sure the radial menu is enabled. You can also show or hide the menu by right-clicking on the desktop app icon in your notification area on your computer. Choose **Preferences** and then **Hide Radial Menu** or **Show Radial Menu**.
- The radial menu only works with Office versions 2010 and later.
- The radial menu only works with locally installed Office applications, not web-based applications.

Links in Outlook email on a Mac don’t work as I expect

Links to an Office file, such as a Word file or spreadsheet, may not open correctly on an Apple Mac computer.

When a link is sent to an Office document to a person using a Mac, the document link will not open correctly. The Outlook software recognizes the Office extension and attempts to open the corresponding Office app rather than use the browser to view the document.

There are several workarounds for this issue:

- Right click on the link and select **Open Link** to open the link in a browser.
- Remove the document name from the link.
- Replace the period in the document name with an underscore.

Any of those actions will open the file correctly.

Sharing Troubleshooting

Here are some questions you might have about sharing your content or sites.

- I shared a folder with someone, but they can't use it the way I expected
- Someone sent me a folder link, but I can't access the files there
- I can't get a public link to send to someone in a folder that's shared with me
- Files are missing from one of my folders that I shared
- I can't create a public link to a folder I own
- I have a link to a file or folder but it requires an access code
- I stopped sharing a folder and now the subfolders aren't shared

I shared a folder with someone, but they can't use it the way I expected

When you share a folder, you assign a role to the people you invite to the folder. Depending on the role you assigned, that person may not be able to download files, edit files, or do other actions. You can change the role assigned to someone as needed

If you email a Member link to someone, that person must be able to log in to Oracle Content and Experience Cloud to access the files in a folder. If you need to share a folder with someone who doesn't have access to the service, email a public link instead.

If you created a public link for a folder then emailed that link to someone, that person may not have the necessary rights to the folder. The default role for public links is Viewer but you can change the default role. To see the defaults for your account, click your user name and then click **Preferences**.

Someone sent me a folder link, but I can't access the files there

You may not have the appropriate permissions to access a file in a folder. If the link is to a shared folder, you may have been removed as a member of the folder or your role may have changed in the folder, limiting your access to the files.

If the folder link was created as a public link, that public link might be removed and therefore the link will stop working. When a public link is sent, a role is assigned to the person receiving the link. If the link was sent with a Viewer role, then files can't be downloaded.

It's possible that someone may have deleted the folder that was shared with you. In that case, the link won't work.

I stopped sharing a folder and now the subfolders aren't shared

If you share a parent folder that you own and then change your mind and remove sharing, all the subfolders that were shared are no longer shared.

I have a link to a file or folder but it requires an access code

A public link can be created that requires an access code to use the link. This is created by the person who creates the link. You’ll need to contact the person who sent the link to get the access code.

I can't get a public link to send to someone in a folder that's shared with me

When someone shares a folder with you, you're assigned a role. Depending on your role, you may not be able to email a public link to a file in that shared folder. When that happens, the Public link tab isn't available.

Files are missing from one of my folders that I shared

If you share a folder and assign a Manager or Contributor role to someone for the folder, that person can also delete files from the folder or delete subfolders.

If the item is deleted using the browser, the items appear in the Oracle Content and Experience Cloud Trash folder for the owner of the items and the person who deleted the items. Either the owner or the person who deleted the items can restore the items from Trash. Only the owner can permanently delete the items in Trash.

If the items are being synchronized using the desktop sync client, the deleted items appear in the recycle bin on your desktop even if you were not the person who deleted the items.

It's best to restore the files from the Trash folder using the web browser. That way you can be sure you have the latest copy of the information.

Your service administrator can set the length of time that items in Trash are retained. If the item is missing, it may be that your Trash was automatically emptied.

I can't create a public link to a folder I own

Your service administrator may have disabled public links. To check, click **Preferences** and then **Sharing**. If the Public options aren't available, they've been disabled.

Mobile Troubleshooting

Here are some questions you might encounter when using your mobile device.

- What do I do if my device is lost or stolen?
- I can't view a file when I have Viewer rights in a shared folder
- I need to reset my passcode
- I can't view a file that I downloaded
- I’m having trouble viewing a video
- Where are my downloaded files stored?
- My file didn't sync in the Android app
- I got an error when transferring a file during sync in the Android app
- My edits don't appear in a file I synchronized on my Android device

I need to reset my passcode

To reset your passcode, you have to know the old passcode. Sign in to the app and on the Settings page, go to the Security section. You'll see an option there to change your passcode.

If you don't know your old passcode, tap **Forgot Passcode** to sign out of the app. You can then sign back in and reset your passcode.

I can't view a file when I have Viewer rights in a shared folder

You need to have a Downloader, Contributor, or Manager role to view files on an iPhone or iPad because files must be downloaded first before you can view them. If you don't have a role that lets you download a file, then you can't view the file.

I can't view a file that I downloaded

To view a file, you need the right software on your device. For example, if you downloaded a PDF file, you would need an app on your device that can open a PDF file. If you don't have the right app, you won't be able to view the file.

I’m having trouble viewing a video

When playing a video on an iPad or iPhone, the video is downloaded and played in the app using the native iOS viewer. If a format can’t be viewed, you can download the video and open it another app for viewing.

When playing a video on an Android device, use the **Open In** option to play the video using a different viewer on the device.

Where are my downloaded files stored?

Downloaded files are stored in the Downloads area on an iPhone or iPad. To access that area, go to the navigation menu and tap **Downloads**.

There is no Downloads area on an Android device. You can synchronize files on an Android device to work with them in another app, the same way downloaded files are used in another app on an iPad or iPhone.

You can delete any file that's downloaded to your device without affecting the original copy stored in the cloud. Go to the Downloads area and find the file you want to delete from your device. Select the file or files to delete and tap **Delete** at the bottom of the screen.

My file didn't sync in the Android app

Sync may not happen for a couple of reasons:

- If you aren't connected to a network.
- If you don't have automatic sync turned on. Tap to access your settings. Choose the account you want to use then tap **Synchronization Settings** and turn on auto-sync.

I got an error when transferring a file during sync in the Android app

A sync error might happen in the following circumstances:

- If you're syncing a file and you lose your connection to Oracle Content or to the network. Try re-syncing the individual file or do a full sync of all files.
- If your local file storage is full. Your device may be out of space and can't save the synced file. Check your storage amount and delete files if needed.

My edits don't appear in a file I synchronized on my Android device

When you choose to auto-synchronize a file on your Android phone or tablet, the file on your device is kept current with the file that's stored in the cloud according to the update frequency you specified. When the file in the cloud is updated, the copy on your device is automatically updated, too.

If you edit the file using another app on your Android phone or tablet, its counterpart in the cloud isn't updated automatically. You'll have to upload it to the cloud to update the copy there.

What do I do if my device is lost or stolen?

When you use Oracle Content and Experience Cloud from a mobile device or the sync client, the information about that access is saved. If you lose your device or it's taken, you should remove that device from the list of those used to access the service. To remove a device and revoke the access for it:

1. Sign in to Oracle Content and Experience Cloud in a web browser.
2. Click your user name and select **Preferences**.
3. Select **Linked Devices** from the dropdown menu near the Preferences heading.
4. Find the device to remove and click **Revoke**.

Your device's authorization to access the service is removed. The next time you or anyone else tries to activate the app on the device, the account is signed out and all local content stored on the device for that account is deleted.

Revoking access for the device affects only one account, so if you're using multiple accounts, you need to revoke access separately for each account to block all access to Oracle Content and Experience Cloud and delete all local content stored on the device.

Sites Troubleshooting

You may have some questions about creating sites. Here's some answers for you.

- I am trying to create a site, but there are no templates
- I can't delete a site
- I can't open the site tree or edit a page
- I added a component, but it doesn't show up on the page
- My folder, file, and conversation components don't work
- I uploaded a new version of an image, but it doesn't show up on the page
- I changed the page layout and some of my content disappeared
- I added a component based on another service but it isn't working

I am trying to create a site, but there are no templates

Templates must be installed and shared before you can create a site.

The templates provided with Oracle Content and Experience Cloud must be installed and shared by an administrator before you can use them. Contact your administrator.

Similarly, when you create a template, whether by importing, copying, or creating from a site, the template can't be used by anyone else until you explicitly share it.

See Configuring Site Settings in *Administering Oracle Content and Experience Cloud*.

I can't delete a site

Here are some reasons why you may not be able to delete a site:

- The site is online.

  First, take the site offline and then delete it. You must have the manager role for a site to take the site offline.

- You don't have the required privileges.

  You can delete a site if you created the site (you're the site owner) or if someone has shared a site with you and has given you the contributor or manager role.

See How do I manage sites?

I can't open the site tree or edit a page

The site editor opens in preview mode by default, which allows you to view the site, but not edit it. You can only edit a site if the editor is in edit mode.

Make sure that  is set to **Edit**.

I added a component, but it doesn't show up on the page

There are several possible reasons for this.

- Verify that the URL associated with a remote component (app) is valid.

  See How do I register a remote component?

- The editor encloses remote components in an HTML element called an inline frame (iframe tag). Not all remote components allow being enclosed in an inline frame.

  Check with the component provider to find out if it can be enclosed in an inline frame.

My folder, file, and conversation components don't work

Components that communicate with Oracle Content and Experience Cloud require certain resources and settings.

The following components require access to resources in Oracle Content and Experience Cloud:

- Folder list
- File list
- Documents manager
- Conversation

Folder and file components require access to the REST application programming interface (API).

Verify the following:

- The component must have access to the API endpoint to access folder and file REST operations.

  By default, the Oracle Content and Experience Cloud REST API endpoint is available if you use the standard URL provided for the site. If you use a custom

URL, you may have to explicitly provide access to the /documents REST API endpoint.

See How do I map a site URL?

I changed the page layout and some of my content disappeared

If you choose a layout with fewer or differently named slots, existing content in other slots won't display in the new layout.

The content isn't deleted, it just can't be displayed unless the layout you choose has a slot with the same name.

Make sure you choose a layout with the same number of slots. If the layout you choose has the same number of slots, but some of your content still does not display, it's likely the slots have different names. Contact the theme designer to resolve the discrepancy.

I uploaded a new version of an image, but it doesn't show up on the page

When you select an image file from the repository to use with a component, a unique copy is created and stored with the site.

When you upload files, they are stored in the Oracle Content and Experience Cloud repository. If you upload a file with the same name as an existing file, it creates a new version of the file.

The image file you see on the page is a copy of the file selected from the repository and is not automatically updated. This is by design and prevents inadvertent changes in existing pages when an image file is updated in the repository.

To update the image used with the component, you must explicitly select the image from the component property page. See How do I use images?

I added a component based on another service but it isn't working

You can integrate your site with several different processes and services.

If you created a component based on integration with Process Cloud Service, Oracle Policy Automation, and other services, both services must use the same identity domain. Check with the person who set up the integration to verify that the two services use the same identity domain.