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# PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System

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**September 2009**

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# PeopleSoft Enterprise Portal Preface

This preface discusses:

- About PeopleSoft Enterprise Portal.
- Using this PeopleBook.
- Related PeopleBooks.
- PeopleBooks and the PeopleSoft Online Library.

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## About PeopleSoft Enterprise Portal

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Enterprise Portal feature overview.
- PeopleSoft Enterprise Portal and PeopleTools.

## PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

- PeopleSoft Enterprise Portal.
- PeopleSoft Community Portal.
- PeopleSoft Enterprise Internal Controls Enforcer.

### ***PeopleSoft Enterprise Portal***

Oracle's PeopleSoft Enterprise Portal is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Enterprise Portal is ideal for customers wishing to deploy an unlimited number of communities across enterprise that focus on PeopleSoft application business processes.

PeopleSoft Enterprise Portal 9.1 contains a rich set of Web 2.0 features. For instance, collaborative workspaces and related content services can be keyed to PeopleSoft application transactions providing contextually relevant collaboration.

PeopleSoft Enterprise Portal 9.1 provides these important new features:

- Blogs.
- Feed publishing.

- Related content services—specifically, the Related Discussion service, the Related Links service, and the Related Tags service.
- Tagging (also known as social bookmarking).
- Wiki content.

These new features add to the existing features already present in PeopleSoft Enterprise Portal:

- Action items
- Collaborative workspaces
- Community calendars
- Context Manager
- Discussion forums
- Document management
- Polls and surveys
- Resource Finder
- Searches and saved searches

See "[PeopleSoft Enterprise Portal Preface](#)," [PeopleSoft Enterprise Portal Feature Overview](#), page xv.

### ***PeopleSoft Community Portal***

Oracle's PeopleSoft Community Portal joins PeopleSoft Enterprise Portal as an option for creating a portal experience using the PeopleSoft Portal Solutions product family.

PeopleSoft Community Portal has the same collaborative features and functions as PeopleSoft Enterprise Portal. However, with PeopleSoft Community Portal, you are limited to creating and managing a maximum of three sites. With PeopleSoft Enterprise Portal, you can create and manage an unlimited number of sites.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "PeopleSoft Community Portal."

### ***PeopleSoft Enterprise Internal Controls Enforcer***

Oracle's PeopleSoft Enterprise Internal Controls Enforcer is designed to automate and enforce internal controls required under Section 404 of the Sarbanes-Oxley Act. Using the product's monitoring and diagnostic capabilities, you can reduce the cost of complying with the new regulations and the risk of unforeseen changes in internal controls. PeopleSoft Enterprise Internal Controls Enforcer will work in conjunction with other PeopleSoft corporate governance solutions to make the entire compliance process repeatable and auditable, allowing you to focus on running your business.

In addition, the product enables you to continuously track and monitor controls, and, optionally, certify their effectiveness at interim times throughout the year to support certifications that are required for Section 302 of Sarbanes-Oxley.

See *PeopleSoft Enterprise Internal Controls Enforcer 9.1 PeopleBook*, "PeopleSoft Internal Controls Enforcer Preface."

## PeopleSoft Enterprise Portal Feature Overview

Two key characteristics distinguish PeopleSoft Enterprise Portal as a rich Web 2.0 platform:

- First, PeopleSoft Enterprise Portal is a traditional portal framework that can be used for aggregating and managing content.
- Second, its collaborative capabilities make PeopleSoft Enterprise Portal a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Enterprise Portal is built on the same architecture and with the same tools as PeopleSoft applications. This provides native integration and single sign-on with PeopleSoft applications. Because PeopleSoft Enterprise Portal is built on the PeopleTools platform, these core characteristics are also available in your portal implementations:

- Branding.
- Common toolset across all PeopleSoft applications.
- Database, application server, and web server independence.
- Feed Publishing Framework.
- Related Content Framework.
- Rich text editor.
- Role-based security and access management.
- Single sign-on.
- SOA support through Integration Broker.

Combined with pre-built application content delivered as PeopleSoft application portal packs, these features make configuration and deployment of PeopleSoft Enterprise Portal for a PeopleSoft-rich environment much easier than with other portals.

PeopleSoft Enterprise Portal provides numerous collaboration and Web 2.0 features such as blogs, content management, discussion forums feeds, tagging, collaborative workspaces and others. Each of these features is discussed briefly in this section.

### ***Action Items***

Miscellaneous to-do's and issues are frequently assigned during project status meetings and in workspaces. Successful resolution of these detailed action items is critical to meeting broader business objectives. PeopleSoft Enterprise Portal provides an action items feature that helps project leaders track open action items assigned to various team members as well as capture their resolution for a given project.

### ***Blogs***

Blogs (or weblogs) are a familiar and useful means for authoring and broadcasting information for an individual or team. Blogs are also participatory in that they allow for commentary and feedback from the audience. In PeopleSoft Enterprise Portal, blogs are integrated with other features such as feeds, notifications, search, tagging, and workspaces.

## ***Branding***

A WYSIWYG interface allows branding administrators to define and deploy header and footer elements for the portal. Because branding is integrated with site management as well as collaborative workspaces, subject matter experts can override these branding elements locally, making it easier for non-portal experts to create compelling sub-communities within the portal.

## ***Calendars***

In PeopleSoft Enterprise Portal, calendars allow communities to manage events within portals, sites, and workspaces. Individual communities or workgroups can maintain their own distinct calendars. Users can subscribe to any or each of the calendars to which they have access and display the results as a unified calendar on their homepage or within a workspace.

## ***Collaborative Workspaces***

A collaborative workspace is a virtual team room. Workspaces can be created to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals. Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

In PeopleSoft Enterprise Portal, collaborative workspaces incorporate the product's other collaborative features including action items, blogs, calendars, discussions, documents, feeds, polls, search, tagging, and wikis. In addition, workspaces can be contextually linked to PeopleSoft application pages to provide robust collaboration in the context of transactions and business processes.

## ***Content Management***

PeopleSoft Enterprise Portal's content management system enables you to organize all your content creation processes. The content management system helps you to manage, create, and organize content, through approval, version management, and publication features. The resulting content is ready and available for browsing by users and for reuse in portal pagelets, news publications, related information, and workspaces. Content migration allows you to author content in a staging database and then migrate the finalized content to a production database.

## ***Context Manager***

In PeopleSoft Enterprise Portal, Context Manager appears as a frame on the right side of the page displaying pagelets that are loaded with appropriate information based on the target page or transaction. Context Manager is the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate. PeopleSoft Enterprise Portal also delivers related content services to provide PeopleSoft Enterprise Portal features on any PeopleSoft application pages.

See "[PeopleSoft Enterprise Portal Preface, Related Content Services, page xvii](#)."

## ***Discussion Forums***

Discussion forums provide a platform that groups can use to discuss topics of interest. Participants can post discussion topics, such as issues, suggestions, or questions, and receive replies and feedback. In PeopleSoft Enterprise Portal, discussion forums are integrated with other features such as action items, alerts, documents, feeds, notifications, search, tagging, and workspaces. Standalone forums within a portal or site can be managed as moderated or unmoderated.

## ***Feed Publishing and Consumption***

PeopleSoft Enterprise Portal leverages the PeopleTools Feed Publishing Framework to deliver feeds for several features including blogs, discussion forums, news publications, and workspaces. You can use the framework to publish secure or public feeds. These feeds make it easy for people to subscribe to information that interests them, rather than logging into the application that delivers this information. PeopleSoft Enterprise Portal also provides pagelets and features that facilitate the discovery and consumption of internal and external feeds.

## ***My Links***

My Links functionality provides an easy way for to bookmark your most frequently needed and accessed content. My Links serves as a collection of bookmarks to specific PeopleSoft Enterprise Portal pages, to PeopleSoft transactions, and to non-PeopleSoft content such as external websites.

## ***Polls and Surveys***

PeopleSoft Enterprise Portal provides polls as a simple way to gather opinions and comments from portal users using a pagelet that is displayed on the portal or site homepage, in a workspace, or attached to a menu item. While polls cover a single question only, surveys allow you to create and distribute questionnaires and evaluate the responses.

## ***Related Content Services***

The PeopleTools Related Content Framework provides the tools for subject matter experts or portal administrators to contextually link application pages with collaborative content provided as related content services. PeopleTools provides the service definitions for three PeopleSoft Enterprise Portal related content services:

- Related Discussion service
- Related Links service
- Related Tags service

These related content services provide features of PeopleSoft Enterprise Portal that can be added to PeopleSoft application pages through the framework. While the service definitions are provided in PeopleTools, an installed PeopleSoft Enterprise Portal database is required to provide the services and to store the related data.

## ***Resource Finder***

Resource Finder is a highly flexible repository that you can configure to receive data loads containing information about any organizational resource, along with links that relate these resources to each other. These resources are typically things like customers, suppliers, employees, departments, locations, companies, and business units, but can also be easily expanded to include things like products and projects, for example.

## ***Search***

In PeopleSoft Enterprise Portal, searches can be executed from the portal header, from within specific features, and via saved searches. From the portal header and the search page, searches can be scoped or limited to specific types of content. Because tags are integrated into search indexes, search results improved based on user tagging. Integration with Oracle's Secure Enterprise Search (SES) exposes PeopleSoft Enterprise Portal content to external systems via web services.

## ***Tags***

Tags, also known as social bookmarks, provide the means for users to store, organize, search, and manage content bookmarks in PeopleSoft Enterprise Portal. Tagging increases the probability of properly characterizing the content and hence its discovery and use. In PeopleSoft Enterprise Portal, tagging is integrated directly with other content types including blogs, collaborative workspaces, content management system items, and discussion forums. In addition, the tagging framework is available through the Related Tags service and to non-PeopleSoft applications as a web service.

## ***Third-Party Integration***

PeopleSoft Enterprise Portal supports integration with:

- Calendar servers: Lotus Domino or Microsoft Exchange 2003 and 2007.
- Email servers: IMAP, Lotus Domino, Microsoft Exchange 2003 and 2007, or POP.
- Instant messaging domains: GTalk, Sametime, XMPP, or Yahoo.
- Oracle Secure Enterprise Search (SES).

## ***Wikis***

Wikis support the collaborative authoring needs of portal users. In PeopleSoft Enterprise Portal, wikis are available in collaborative workspaces, which means that the security controls of workspaces apply to wikis. Wikis incorporate the easy to use rich text editor and other features to provide a collaborative authoring environment.

## ***User Interface Features***

The PeopleSoft Enterprise Portal user interface relies on these features and others from PeopleTools:

- AJAX features such as modal dialog boxes, drop-down menu navigation, and partial page and pagelet refreshes.
- Branding updates incorporating the SWAN style sheet.

- Menu bread crumbs.
- Pagelet drag-and-drop.
- Pagelet Wizard pagelets with help and search.

## PeopleSoft Enterprise Portal and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Enterprise Portal, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the PeopleBooks and chapters that are devoted to portal functionality. Because PeopleSoft Enterprise Portal builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Enterprise Portal suite of PeopleBooks builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft Enterprise HRMS or Oracle's PeopleSoft Enterprise CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search ability, content management, navigation, and homepage personalization.

PeopleTools PeopleBooks cover the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

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## Using this PeopleBook

This section discusses:

- About this book.
- Common elements used in PeopleSoft Enterprise Portal.

## About this Book

This PeopleBook comprises the following chapters:

- Understanding the Content Management System

This chapter discusses Content Management system features and locations of essential information about implementation and setup guidelines.

See [Chapter 1, "Understanding the Content Management System," page 1](#).

- **Setting Up the Content Management System**

This chapter discusses how to set up the Content Management system and how to define Content Management system data.

See [Chapter 2, "Setting Up the Content Management System," page 5.](#)

- **Accessing Content**

This chapter provides an overview of the folder hierarchy and discusses how to browse folder hierarchies search for folders and content, browse published categorized content, view a content folder in a pagelet, and use other methods for accessing folders and content.

See [Chapter 3, "Accessing Content," page 65.](#)

- **Setting Up and Working with Managed Content**

This chapter provides an overview of the Managed Content business process and discusses how to manage folders, add new managed content, manage content versions, work with the My Managed Content pagelet, and import managed content into other features.

See [Chapter 4, "Setting Up and Working With Managed Content," page 81.](#)

- **Setting Up and Working with Categorized Content**

This chapter provides an overview of the fundamentals of the Categorized Content feature and discusses how to manage folders, manually add new categorized content, and manage categorized content.

See [Chapter 5, "Setting Up and Working with Categorized Content," page 151.](#)

- **Running the Content Categorization Spider**

This chapter provides an overview of the content categorization spider process and discusses how to set up to run the content categorization spider, run the content categorization spider, debug a run of the categorization spider, make categorized content available on other sites, and review delivered sample folders of categorized content data.

See [Chapter 6, "Running the Content Categorization Spider," page 179.](#)

- **Setting Up and Working with News Publications**

This chapter provides an overview of the New Publication feature and discusses how to set up news publications, manage sections and section articles, add new articles, associate images with news articles, delete News Publications, manage news articles, administer news content, publish news publications, and view news publications.

See [Chapter 7, "Setting Up and Working With News Publications," page 195.](#)

- **Using the Advanced Options**

This chapter discusses how to browse, search, and maintain all folders; maintain all content; unlock content; review content details; render content URLs, and search for content.

See [Chapter 8, "Using the Advanced Options," page 261.](#)

- Setting Up and Managing Company Promotions

This chapter provides an overview of company promotions and discusses how to set and manage company promotions and view company promotions by role.

See [Chapter 9, "Setting Up and Managing Company Promotions," page 275.](#)

- Setting Up and Managing Web Magazines

This chapter provides an overview of web magazines and discusses how to set up web magazines, maintain graphic images, create and publish articles, and work with the Web Magazine pagelet.

See [Chapter 10, "Setting Up and Managing Web Magazines," page 289.](#)

- Appendix A: Creating Custom Templates for Web Magazines

This appendix discusses how to construct templates for cover pages, use the section page layout to display articles in a particular section, and use the article page layout to display articles within the publication.

See [Appendix A, "Creating Custom Templates for Web Magazines," page 303.](#)

- Appendix B: iScripts Used to Assemble and Present Web Magazines

This appendix provides an overview of web magazine iScripts and discusses the iScripts within the Web Magazine hierarchy.

See [Appendix B, "iScripts Used to Assemble and Present Web Magazines," page 317.](#)

- Appendix C: Performing Content Autocategorization

This appendix provides an overview of the autocategorization process and setup tasks, discusses how to define autocategorization engine vocabularies, and discusses how to perform autocategorization.

See [Appendix C, "Performing Content Autocategorization," page 341.](#)

- Appendix D: Understanding Content Management Tables

This appendix provides an overview of the tables that support Content Management features and categorized content.

See [Appendix D, "Understanding Content Management Tables," page 345.](#)

- Appendix E: Using Integration Broker for Content Migration

This appendix discusses how to verify service operation and add routing for REQUEST, RESPONSE, and PREVIEW message in the source and the target databases.

See [Appendix E, "Using Integration Broker for Content Migration," page 351.](#)

- Appendix F: Setting Default Approver Role for Content Management

This appendix discusses how to set and modify a default approver role.

See [Appendix F, "Setting Default Approver Role for Content Management," page 357.](#)

## Common Elements Used in PeopleSoft Enterprise Portal

This section discusses the rich text editor.

### ***About the Rich Text Editor***

Many PeopleSoft Enterprise Portal features—including blogs, discussion forums, text/HTML content, wiki content, and others—employ the rich text editor.

The rich text editor provides editing and formatting capabilities for long edit boxes. It allows for the rich formatting of text content, including structural elements such as HTML tags and lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and sizing of images among other features. Moreover, the rich text editor tool bar is extensible by using a custom settings configuration file.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Working With Pages," Working With Rich Text-Enabled Fields.

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## Related PeopleBooks

This section discusses:

- PeopleSoft Enterprise Portal PeopleBooks.
- PeopleTools PeopleBooks.

## PeopleSoft Enterprise Portal PeopleBooks

The PeopleSoft Enterprise Portal PeopleBook library includes:

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*

This PeopleBook covers the branding feature, which enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*

This PeopleBook covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety of collaborative projects and processes.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*

The PeopleBook you are reading, this book describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*

This PeopleBook covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*

This PeopleBook describes how to setup and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*

This PeopleBook covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Enterprise Portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

## PeopleTools PeopleBooks

The PeopleTools 8.50 PeopleBook library contains the complete set of books covering PeopleTools 8.50. In particular, several of these books are useful to the setup, administration, and use of PeopleSoft Enterprise Portal including:

- *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*

The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Enterprise Portal data as feeds. In addition, the framework can be used to develop custom feed types.

- *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*

Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*

PeopleTools portal technology is the foundation of the PeopleSoft Enterprise Portal product. This book covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the Related Content Framework, and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

This book covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*

This PeopleBook provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

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**Note.** These and other PeopleBooks in the PeopleTools library are referenced as needed.

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## PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

## Chapter 1

# Understanding the Content Management System

This chapter discusses PeopleSoft Enterprise Portal Content Management system features.

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## Enterprise Portal Content Management System Features

The Oracle PeopleSoft Enterprise Portal enables you to organize all your content-creation processes and their results. Content Management includes features to help you manage, create, and organize content, as well as manage crawling, approvals, versioning, multiple user access, and publication processes. The resulting content is ready and available for placement in various portal pagelets, including News Publications, Related Information, and Browsing Categorized Content.

The portal's Content Management and Publication system includes the following types of features:

- *Managed Content:* This feature enables you to organize content in folders, create content, and share content with other users.

The system offers a check-in checkout function, version controls to safeguard editions of content, and a submission and approval process that culminates in content and available for publishing to a wider portal audience.

- *Content Categorization:* This feature enables you to access web server and file server content, or content management entries through a detailed categorization hierarchy.

The PeopleSoft Enterprise Portal uses a crawler to automatically populate the hierarchy.

- *News Publications:* This feature enables you to organize approved content in multiple publications, which are viewable as pagelets on the portal.

Content can be imported from Managed Content folders or created within the publication feature itself. New content goes through a submittal process, which can include author and editor revisions, and can be published to a pagelet and removed according to specific dates.

- *Web Publishing:* The content of any publication—including web magazines, employee handbooks, business procedures, newsletters, and customer surveys—can be maintained in its entirety in your PeopleSoft portal and dynamically deployed to your audience based on their roles within and outside your organization.

- *Open Content Services:* This feature enables you to integrate third-party content management system content into the portal.

Content contributors, editors, approvers, and publishers can leverage the third-party content management facilities to create, edit, approve, and deploy content and to have the content metadata pushed to the PeopleSoft Enterprise Portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Using Public Web Services."

In addition to these features, the PeopleSoft Content Management system enables you to access and view managed content that is shared by other Enterprise Portal features. The following table describes these features:

<b>Content Management Feature</b>	<b>Description</b>
Collaborative Workspace	<p>A Collaborative Workspace is a virtual team room, which is used to facilitate the completion of a project. A Collaborative Workspace can include modules such as discussion threads, a member directory, and documents to enable team members to collaborate online.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces</i>.</p>
Discussion Forum	<p>Discussion Forum provides a platform where discussion groups can be created and participants can post topics and replies. Participants can monitor the groups to which they belong through the Discussion Forum pagelet on the homepage.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces</i>, "Working in Collaborative Workspaces," Using the Discussions Module.</p>
Manage Navigation	<p>Manage Navigation provides an interface to the portal registry for tasks that are specific to the current site, based on site defaults. Authorized site administrators can manage their site's content and navigation without having access to the registry for other sites or to the default portal.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration</i>, "Publishing to a Site," Managing Site Navigation.</p>
Menu Item Requests	<p>Menu Items are pages, websites, or files that are accessible from the navigation menu. The Menu Item Requests feature enables portal users to contribute information to their organization's intranet by submitting a menu item request for a file attachment, managed content, a website URL, or a PeopleSoft URL.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration</i>, "Managing Menu Item Requests."</p>

<b>Content Management Feature</b>	<b>Description</b>
Pagelet Wizard	<p>The Pagelet Wizard supports the creation of pagelets from a wide variety of data sources. Supported data sources include PSQuery, general URL, Integration Broker, HTML, Managed Content (HTML or text), Navigation Collection, and Java.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: Internet Technology</i>.</p>
Related Information	<p>The Intelligent Context Manager enables a pagelet to be loaded with information based on the target page or transaction. The Related Information pagelet takes advantage of the Intelligent Context Manager. The content that is made available with this pagelet includes external URLs, menu items, and managed content.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i>, "Understanding PeopleSoft Enterprise Portal-Delivered Related Content Services."</p>
Action Items	<p>The Action Items feature enables you to create and track action items, as well as collaborate with other users. Action items are assignments or tasks that are assigned to people across groups and require some sort of activity, monitoring, or event to take place before they can be considered complete. Items can be tracked through summary homepage pagelets and inquiry pages, as well as through email notification and calendar entries.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i>, "Working With Action Items."</p>
Community Calendar Events	<p>Community calendars provide a way for groups to share, organize, and communicate about events that pertain to their organization or group. Calendar membership can be assigned for users or roles and have different privileges including the ability to view, create, and edit the events for a calendar. Users can view calendars online in pagelets, the full-page view accessible from the pagelet, or the menu navigation. Community calendars can be accessed from portals, sites, and workspaces.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i>, "Working With Community Calendars."</p>

While these features provide many possibilities for content management and publishing, they are based on a single foundation system and underlying technology—the PeopleSoft Enterprise Portal. Portal administrators identify where documents can be stored, how to divide and manage content management responsibilities, and how the user navigates the content management system.



## Chapter 2

# Setting Up the Content Management System

This chapter provides an overview of the setup of the Content Management system and discusses how to:

- Administer the Content Management system.
- Purge or inactivate content.
- Define features.
- Migrate content.

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## Understanding Setup of the Content Management System

The implementation of PeopleSoft Enterprise Portal Content Management requires the following initial setup steps:

1. Identify how to divide and manage responsibilities.

Responsibilities are divided by privilege sets. Specific duties, such as adding folders and publishing content, are assigned to privilege sets on the Privilege Sets page. Privilege sets list the actions that a user can perform on a folder or the content that is located in that folder. When you're creating each content management folder, these privilege set definitions are associated with member roles and user IDs.

Privilege sets are segregated by content management features, and each feature requires a top administrator to create its top folders. The user IDs on the Top Administrators page define who can create the top folders.

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**Note.** Oracle delivers a number of permission lists to support Content Management-related features. These features are discussed in detail in the *Enterprise Portal Application Technology PeopleBook*.

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See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "PeopleSoft-Delivered Security Data."

2. Identify where document content can be stored.

Administrators register Content Management storage locations on the Define File Storage page. You can store content on File Transfer Protocol (FTP) file servers or in database binary large objects (BLOBs). The choice of URLs is based on the information from the URL Maintenance page that is found in the PeopleTools, Utilities, Administration, URLs menu path.

See [Chapter 2, "Setting Up the Content Management System," Defining Document Storage Locations, page 21.](#)

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities," Using Administration Utilities, URL Maintenance.

3. Identify where image attachments can be stored.

PeopleSoft Enterprise Portal can upload, access, and render image files by way of an FTP service. To render image files as actual images, the FTP service must exist in a web server directory in the PeopleSoft domain.

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**Note.** The web server directory extension and the FTP service should be installed only on a single web server that is used by the Enterprise Portal database. For clustered web servers, all image attachments are rendered and stored on a selected single web server.

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## Administering the Content Management System

This section provides an overview of the administration of the Content Management system and discusses how to:

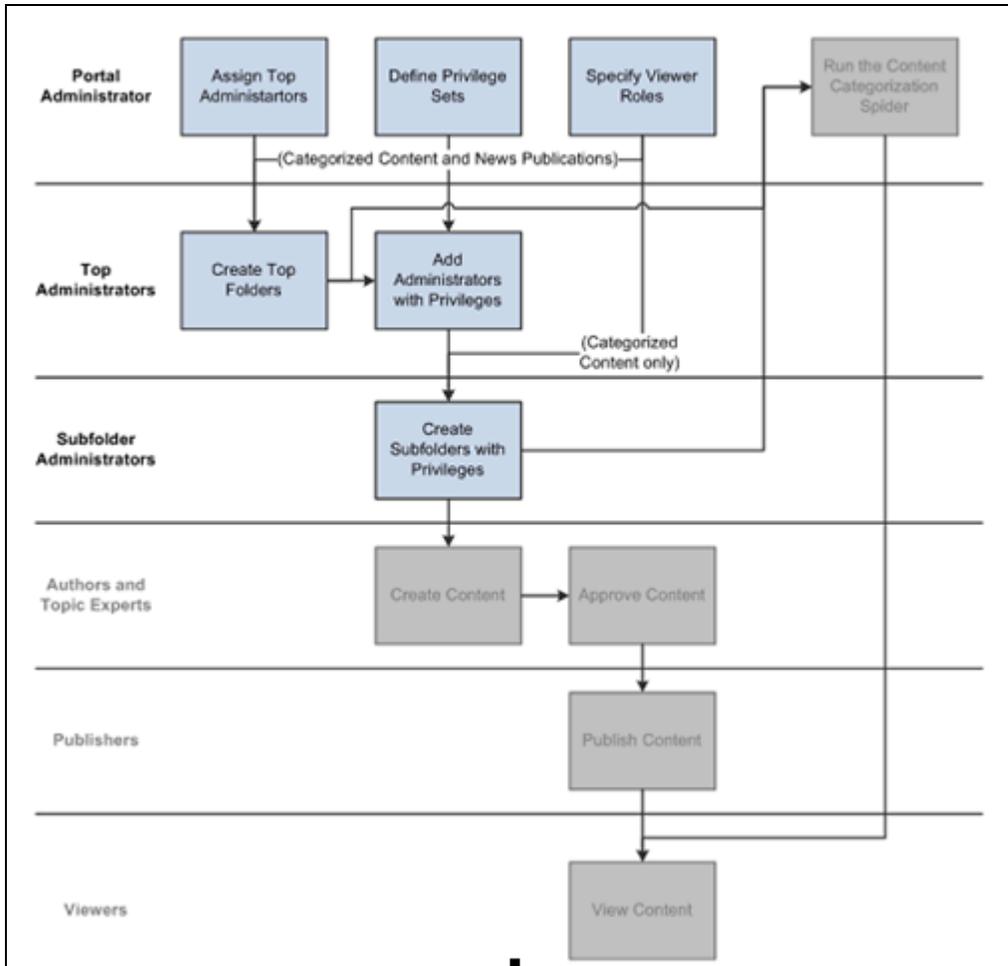
- Assign top administrators.
- Define privilege sets.
- Create a top folder.
- Add a subfolder.
- Specify viewer roles.
- Define document storage locations.
- Set up an FTP service for image attachments.

## Understanding Administration of the Content Management System

PeopleSoft Enterprise Portal enables you to organize your content-creation processes and the resulting content. PeopleSoft Enterprise Portal's Content Management system includes features for content creation, content versions, approval, organization, publication, automatic acquisition (crawling), and management. The resulting content is ready and available for placement in various portal pagelets, including news publications, related information, and categorized content.

Before content can be created, published, and used, the Content Management system folder hierarchy and privilege sets must be set up by administrators. Depending on the needs of the site, the tasks of administering the Content Management system can be distributed across multiple administrator roles.

This flowchart summarizes the Content Management system folder hierarchy and privilege settings that must be set up by administrators before content can be created, published, and used:



Content Management system folder hierarchy and privilege settings

The following list highlights the administration tasks by role:

1. Assign top administrators for each feature of the Content Management system (portal administrator).
2. Define privilege sets for each feature of the Content Management system (portal administrator).
3. Specify viewer roles for viewing published content from the Content Management system (portal administrator).
4. Create the top folders for a feature (top administrators by feature).
5. Set top folder properties, add administrators, and set privileges to each top folder (top administrators by feature).
6. Create subfolders, set folder properties, and assign privileges for each of those subfolders (subfolder administrators).

## Pages Used to Administer the Content Management System

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Top Administrators	EPPCM_TOP_CAT_ADMN	Content Management, Administration, Top Administrators	Assign specific users who will be able to create top folders within the Content Management system. A top administrator must be defined for each Content Management-based feature that is actively being used.
Privilege Sets	EPPCM_PRIVILEGES	Content Management, Administration, Privilege Sets	Define the security privilege sets to secure row-level access to a specific feature in the Content Management system.
Folder Properties	EPPCM_CATG_MAIN	Content Management, Managed Content, Browse Folder  Click the Add Top Folder button.	Set the properties for a new folder or to update property details for an existing folder.  <b>Note.</b> Use the Folder Properties page for top folders as well as for subfolders.
Folder Securities	EPPCM_CATG_MEM	Content Management, Managed Content, Browse Folder  Click the Add Top Folder button.  Select the Folder Security tab.	Manage the folder members and their privileges. This page lists the members and privilege sets for the current folder.
Folder Security - Select Member Privileges	EPPCM_CATG_PRIV	Content Management, Managed Content, Browse Folder  Click the Add Top Folder button.  Select the Folder Security tab.  Click the Add Member button or the Edit button.	Assign privilege sets for the current folder.
Viewer Roles	EO_PE_ROLE_TBL	Content Management, Administration, Viewer Roles	Define the viewer (audience) roles to use to secure published content.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
File Storage	EPPCM_DEFAULT_URL	Content Management, Administration, File Storage	Define the storage location for file attachments in the Content Management system.
URL Maintenance	URL_TABLE	Content Management, Administration, File Storage  Click the Edit link that is associated with the desired URL ID on the File Storage page.	Set up the FTP URL addresses or record names of the document repositories.  <b>Note.</b> This setup must be done before you access the Content Management setup pages; it is the responsibility of the system administrator.
Purge/Inactivate	EPPCM_PRG_RUN	Content Management, Administration, Purge/Inactivate	Purge content or folders, inactivate content, unpublish content, or delete versions from the Content Management system.

## Assigning Top Administrators

Access the Top Administrators page (select Content Management, Administration, Top Administrators).

## Top Administrators

Specify one or more users as a Top Administrator for the Features in the Content Management system. Only these users can create Top Folders where the feature allows more than one top folder. Top Administrators are granted all Privilege Set actions for the Feature.

Administrators					
Customize   Find   View All   First 1-25 of 27 Last					
	*Feature	*User ID		Description	
1	Categorized Content	PAPP_CONTCATGADM	🔍	Categorization Administrator	+ -
2	Collaborative Workspaces	PAPP_CONTENTADM	🔍	Content Administrator	+ -
3	News Publications	PAPP_CONTENTADM	🔍	Content Administrator	+ -
4	Managed Content	PAPP_CONTENTADM	🔍	Content Administrator	+ -
5	Discussion Content	PAPP_DISCUSSIONSADM	🔍	Discussions Administrator	+ -
6	Action Items	PS	🔍	PeopleSoft Demo Role User	+ -
7	Categorized Content	PS	🔍	PeopleSoft Demo Role User	+ -
8	Related Content	PS	🔍	PeopleSoft Demo Role User	+ -
9	Discussion Content	PS	🔍	PeopleSoft Demo Role User	+ -
10	Collaborative Workspaces	PS	🔍	PeopleSoft Demo Role User	+ -
11	Calendar Events	PS	🔍	PeopleSoft Demo Role User	+ -
12	News Publications	PS	🔍	PeopleSoft Demo Role User	+ -
13	Managed Content	PS	🔍	PeopleSoft Demo Role User	+ -
14	Menu Item Requests	PS	🔍	PeopleSoft Demo Role User	+ -
15	Navigation Content	PS	🔍	PeopleSoft Demo Role User	+ -

Top Administrators page

Use this page to assign specific users who will be able to create top folders within the Content Management system. A top administrator must be defined for each Content Management-based feature that is actively being used.

For example, within the Categorized Content feature, at least one user must be able to create top folders to delegate more specific responsibilities within those top folders. Similar top administrator responsibilities must be assigned for managed content, news publications, discussion forums, and other features.

---

**Note.** The top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned member.

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<b>Feature</b>	<p>Use the drop-down list box to select a feature for this privilege set. Available features are:</p> <ul style="list-style-type: none"> <li>• <i>Categorized Content</i></li> <li>• <i>Collaborative Workspace</i></li> <li>• <i>Discussion Forum</i></li> <li>• <i>Manage Navigation</i></li> <li>• <i>Managed Content</i></li> <li>• <i>Menu items</i></li> <li>• <i>News Publications</i></li> <li>• <i>Pagelet Wizard</i></li> <li>• <i>Related Information</i></li> </ul> <hr/> <p><b>Note.</b> For non-Content Management features, such as Discussion Forum, top administrators can view the content through Content Management.</p> <hr/>
<b>User ID</b>	<p>Use the search icon to select the user who is to be granted top folder authorization for the corresponding feature. For Discussion Forum, the search prompt limits the selection to users who have security access to the browse component.</p> <hr/> <p><b>Note.</b> You can also enter a value manually.</p> <hr/>
<b>Description</b>	<p>Display the description for this privilege set.</p> <p>This value is set in the Folder Properties - Security page.</p>

## Defining Privilege Sets

Access the Privilege Sets page (select Content Management, Administration, Privilege Sets).

Define Privilege Sets

## Privilege Sets

Define the security Privilege Sets used to secure row level access for this feature in the Content Management system. Privilege Sets are assigned to folder members. Privilege Sets list the actions a member can perform upon a folder or the content located in that folder. Select the appropriate privilege actions for the privilege set. Only non-system Privilege Sets and Privilege Sets not assigned to any folder member can be deleted.

Privilege Set: ADMINISTRATOR  System Item

Feature: Managed Content  Assigned

\*Description:

Content Privileges	Folder Privileges	Discussion Privileges
<input checked="" type="checkbox"/> View Content	<input checked="" type="checkbox"/> View Folder	<input checked="" type="checkbox"/> View Content Discussions
<input checked="" type="checkbox"/> Subscribe to Content	<input checked="" type="checkbox"/> Add Folder	<input checked="" type="checkbox"/> Add Content Discussions
<input checked="" type="checkbox"/> Add Content	<input checked="" type="checkbox"/> Edit Folder	<input checked="" type="checkbox"/> Moderate Content Discussions
<input checked="" type="checkbox"/> Edit Content	<input checked="" type="checkbox"/> Delete Folder	
<input checked="" type="checkbox"/> Edit Content Metadata	<input checked="" type="checkbox"/> Assign Members	
<input checked="" type="checkbox"/> Delete Content	<input checked="" type="checkbox"/> Publish Folder	
<input checked="" type="checkbox"/> Delete Approved Content	<input checked="" type="checkbox"/> Unpublish Folder	
<input checked="" type="checkbox"/> Release Locked Content		
<input checked="" type="checkbox"/> Publish Content		
<input checked="" type="checkbox"/> Approve Content		

### Privilege Sets page

Use this page to create and maintain privilege sets, which are unique to each Content Management feature. Within each privilege set, three groupings of privileges are available: content privileges, folder privileges, and discussion privileges. Each privilege controls the visibility of an action button on the folder and content management pages. You typically need to set up the administrator privilege set for each feature.

---

**Note.** Some features require additional privilege sets such as author (or contributor), expert (or approver), and viewer. Some privileges may not apply to every feature.

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**Privilege Set**                      Displays the unique privilege set name that is entered on the search page.

<b>Feature</b>	<p>Displays the selected feature for this privilege set. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Categorized Content</i></li> <li>• <i>Collaborative Workspace</i></li> <li>• <i>Discussion Forum</i></li> <li>• <i>Manage Navigation</i></li> <li>• <i>Managed Content</i></li> <li>• <i>Menu Items</i></li> <li>• <i>News Publications</i></li> <li>• <i>Pagelet Wizard</i></li> <li>• <i>Related Information</i></li> </ul>
<b>Description</b>	<p>Enter a meaningful description for this privilege set. This description appears on the Folder Properties - Security page.</p>
<b>System Item</b>	<p>Indicates whether this privilege set is used by the system.</p> <hr/> <p><b>Note.</b> Only non-system privilege sets can be deleted.</p> <hr/>
<b>Assigned</b>	<p>Indicates whether this privilege set is currently assigned to a folder member.</p> <hr/> <p><b>Note.</b> Privilege sets that are assigned to folder members <i>cannot</i> be deleted.</p> <hr/>

### **Content Privileges**

Use this section to select the content privileges for this privilege set.

<b>View Content</b>	<p>Select to provide read-only access to content and the ability to send email notifications.</p> <p>The system automatically assigns the view privilege.</p>
<b>Subscribe to Content</b>	<p>Select to enable the user to add members to the interested party list.</p>
<b>Add Content</b>	<p>Select to enable the user to add new content to a folder and edit his or her authored versions.</p>
<b>Edit Content</b>	<p>Select to enable the user to check out and edit content.</p>
<b>Edit Content Metadata</b>	<p>Select to enable the user to edit the descriptive attributes, but not the content detail itself.</p>
<b>Delete Content</b>	<p>Select to enable the user to delete content from a folder.</p>

<b>Delete Approved Content</b>	Select to enable the user to delete content that is approved or that is pending approval.
<b>Release Locked Content</b>	Select to enable the user to release content that is checked out by another user.
<b>Publish Content</b>	Select to enable the user to publish, reject, or submit content for rework. This option is applicable to the Company News Publication feature.
<b>Approve Content</b>	Select to enable the user to approve, reject, or mark content for rework. This option is applicable to the Workgroups feature.

### ***Folder Privileges***

Use this section to select the folder privileges for this privilege set.

<b>View Folder</b>	Select to provide read-only access to content and the ability to send email notifications.
<b>Add Folder</b>	Select to enable the user to add a new folder below a top folder.
<b>Edit Folder</b>	Select to enable the user to change the properties of a folder.
<b>Delete Folder</b>	Select to enable the user to delete a folder.
<b>Assign Members</b>	Select to enable the user to assign members and their privilege sets to a folder.
<b>Publish Folder</b>	Select to enable the user to publish the folder as a pagelet or publish to the left navigation as a menu item.
<b>Unpublish Folder</b>	Select to enable the user to unpublish a published folder. The user must have security access to the content reference to unpublish it.

### ***Discussion Privileges***

Use this section to select the discussion privileges for this privilege set.

<b>View Content Discussions</b>	Select to provide read-only access to discussion forums.
<b>Add Content Discussions</b>	Select to enable the user to add new discussion topics and responses to forums that he or she can access.
<b>Moderate Content Discussions</b>	Select to enable the user to edit and remove posts in addition to adding topics and responses.

## Creating a Top Folder

Access the Folder Properties page (select Content Management, Managed Content, Browse Folder; click the Add Top Folder button).

Folder Properties page

Use this page to set the properties for a new folder or to update property details for an existing folder.

---

**Note.** The Folder Properties page is used for top folders as well as for subfolders.

---

Users can add folders at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders.

**Title** Enter the desired information.

**Summary** Add a brief description of the content.  
This field supports HTML entries.

**Owner** Assign the owner of the content.  
Click the name link of the owner to access the Instant Message page, where you can send an instant message to the owner.

<b>Content can be Published</b>	<p>Select to enable approved content to be imported and published in features outside of managed content.</p> <p>You must select this option for publishing features to import or reference managed content.</p> <hr/> <p><b>Note.</b> If you want approved content to remain private, you can create a development or work-in-progress folder that is nonpublishable. As content is completed and approved, you can then add a new publishable folder location for the content. The development folder should have only publishing and viewing members.</p> <hr/> <p>See <a href="#">Chapter 4, "Setting Up and Working With Managed Content," Selecting Content Locations, page 140.</a></p>
<b>Folder can be Published</b>	<p>Select to allow for publishing of this folder as a pagelet or menu item.</p> <hr/> <p><b>Note.</b> Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the Publish as Pagelet, Publish as Feed, and Publish as Menu Item links.</p> <hr/>
<b>Do Not Allow Deletes</b>	<p>Select to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.</p>
<b>File Storage</b>	<p>Select the document storage location for the folder's child content.</p> <p>The value appears by default from entries set up for attachment locations. As delivered, two locations are set up: one for storage of attachments in a database table and another as a file server placeholder. The file server choice will not function properly until you edit the URL entry with your server information. The database storage choice functions for the underlying database table that exists within the PeopleSoft Enterprise Portal.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," page 5.</a></p>
<b>Approvals</b>	<p>This field determines the approval mode for the folder. Available options are:</p> <ul style="list-style-type: none"> <li>• <i>Requires Approval:</i> All content in the folder must be approved.</li> <li>• <i>Auto-Approved Content:</i> The system automatically marks content as approved.</li> <li>• <i>Optional Approval:</i> As content is being created, content authors can choose to require approval or have the content automatically approved.</li> </ul> <hr/> <p><b>Note.</b> This setting cannot be changed after content has been created. If you need to change the approval setting, you must delete the content and add it again with the new approval setting.</p> <hr/>

**Inactivate Date**

Select the default inactivation date for content created in this folder.

Content with an archive date previous to the current date does not show in the content list in the Browse Content or My Content pages. However, the content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. Publishing features such as News Publication and Categorized Content use the expiration date to control when the content no longer appears.

Select a default inactivation date for content created in this folder from the following values:

- *Current Date*
- *Current Date + 1 Week*
- *Current Date + 30 Days*
- *Current Date + 90 Days*
- *Current Date + 365 Days*
- *Current Date + 999 Days*
- *Never Archive*

***Adding Members to the Folder with Administrator Privileges***

After you set the properties for a new folder or to update property details for an existing folder, you add a member to the folder with administrator privileges. The administrator privilege allows this user to create subfolders within the new top folder among other administrative privileges.

Access the Folder Securities page (select Content Management, Managed Content, Browse Folder; click the Add Top Folder button, and select the Folder Securities tab.)

Folder Properties | **Folder Security**

Specify the Members, Privileges and Viewers. A Privilege specifies the actions a user can perform upon the folder and the content located in that folder.

[Top > Corporate Communications](#)

**Member Privileges** Customize | Find | View All | First 1-3 of 3 Last

Member Type	Member Name	Privilege Sets		
Role	PAPP_CONTENT_ADMIN	Administrator	Edit	Delete
Role	PAPP_CUSTOMER	Viewer	Edit	Delete
Role	PAPP_PUBLISHER	Viewer	Edit	Delete

Add Member

Save

[Return to Browse Managed Content](#)

### Folder Securities page

Use this page to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page. A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an Inherit Members button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

---

**Note.** A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member of a folder.

---

See [Chapter 2, "Setting Up the Content Management System," Administering the Content Management System, page 6.](#)

- |   |  |
|---|--|
| <b>Edit</b>                             | Click to edit the privileges of this member.   |
| <b>Delete</b>                           | Click to remove the member and prohibit him or her from accessing content from this folder.  |
| <b>Add Member</b>                       | Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform upon the folder and the content located in that folder.   |
| <b>Return to Browse Managed Content</b> | <p>After you finish creating a top folder in the Managed Content feature, click this link to return to the Browse Managed Content page.</p> <p>The folder that you created now appears as a top folder in the Managed Content feature.</p> |

## Setting Member Privileges

Access the Folder Security - Set Members Privileges page (select Content Management, Managed Content, Browse Folder; click the Add Top Folder button; select the Folder Securities tab; and click the Add Member button or the Edit button).

### Folder Security

## Set Members Privileges

Select members and their privilege security.

**Members**

\*Member Type                      \*Member Name

Role [v]                       [magnifying glass]

Member Privileges	
Privilege Set	Privileges
<input type="checkbox"/> Administrator	Add Folder Edit Folder Delete Folder Publish Folder Unpublish Folder Assign Members Add Content Edit Content Edit Content Metadata Delete Content Delete Approved Content Approve Content Publish Content Release Locked Content View Content Discussions Add Content Discussions Moderate Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/> Author	Add Content View Content Discussions Add Content Discussions Subscribe to Content View Content and Folder

Folder Security - Set Members Privileges page, Managed Content component

Use this page to assign privilege sets to the selected member.

**Member Type**                      Select either *Role* or *User* for member type.

**Member Name**                      Enter or select the desired information.

**Privilege Set**                      Select appropriate privileges for this member.  
 Available options are Administrator and Author.

<b>Privileges</b>	Displays the privilege sets that were defined for the Manage Content feature.
<b>OK</b>	Click to accept changes to the privilege sets and return to the Folder Security page.

## Adding a Subfolder

Access the Folder Properties page (select Content Management, Managed Content, Browse Folder; click an entry in the Title column to select a top folder in which to add the subfolder; and click the Add Folder button).

### Folder Properties page

This page is used to set the properties for a new folder or to update property details for an existing folder.

---

**Note.** This Folder Properties page is used for top folders as well as for subfolders.

---

Users can add folders at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders.

The settings for the Content can be Published, Folder can be Published, and Do Not Allow Deletes options as well as for the options in the Child Content Defaults section have been inherited from the parent folder. The members and privileges defined for the parent folder have also been inherited and you cannot modify those privileges.

See [Chapter 2, "Setting Up the Content Management System," Creating a Top Folder, page 15.](#)

## Specifying Viewer Roles

Access the Viewer Roles page (select Content Management, Administration, Viewer Roles).

Role Name	Description		
PAPI_GUEST	Investor Portal Guest	+	-
PAPP_CUSTOMER	Portal Customer	+	-
PAPP_EMPLOYEE	Portal Employee	+	-
PAPP_GUEST	Guest User Access	+	-
PAPP_SUPPLIER	Portal Supplier	+	-
PAPP_USER	Enterprise Portal User	+	-

Viewer Roles page

Use this page to specify the roles that you want to make available to content publishers. Specifying viewer roles creates a short list from all of the PeopleTools security roles defined in the system. Only the roles that are specified on this page are available to publishers when they select roles to make up the authorized viewing audience for published content.

**Role Name** Use the search button to select a role name from PeopleTools security roles. Only the roles that are selected are available to users when they select roles that comprise the viewing audience of published content for news articles and promotions.

**Description** Displays the description for each role.

## Defining Document Storage Locations

Access the File Storage page (select Content Management, Administration, File Storage).

## File Storage

Specify the URL ID where Content Management file attachments are stored. Use the PeopleTools URL catalog maintenance utility to add additional storage URL entries. Each folder contains a property to specify which file storage URL in this list is used for new content created under that folder.

Storage List		Find   View All	First	1-2 of 2	Last
	URL Identifier	Description	Default		
1	<input type="text" value="CMDOCDB"/>	Documents in Database	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">+</a> <a href="#">-</a>
2	<input type="text" value="CMDOCFS"/>	Documents in File Server	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">+</a> <a href="#">-</a>

### File Storage page

Use this page to specify the locations where document file attachments can be stored for the content management features. When users add a new Managed Content folder or News Publication section, they can specify any location that is listed in this table as the storage location for all document files that are in that folder.

**URL Identifier** Use the search button to select the desired URL identifier from a list of available URLs. The system uses this ID when referring to document locations.

The URL list is populated from the URL Maintenance page.

**Description** Displays the description for each URL identifier.

**Default** Select to define the location that you want to use as the default whenever a new folder or new publication section is created.

**Edit** Click to access the URL Maintenance page to set up the URL address for this storage location.

---

**Note.** This page defines locations for document files only. Image files are stored in a specific location on the web server.

---

See [Chapter 2, "Setting Up the Content Management System," Setting Up an FTP Service for Image Attachments, page 25.](#)

Files can be stored on FTP servers or in the Enterprise Portal database as BLOBs. Two locations are predefined, one for each type. However, the FTP server definition is not complete; it is just a placeholder. You must edit the actual FTP URL address for your server, or delete it and add multiple new URL ID choices, as needed, with the actual server and directory addresses. You can specify as many file server locations as necessary. Use the PeopleTools URL maintenance utility to define these URL identifiers:

- *CMDOCFS - File server location:* An FTP service must be running for the PeopleTools file attachment functions to work properly.
- *CMDOCDB - Database Location (BLOB):* The record PS\_EPPCM\_DOCINDB is delivered with the PeopleSoft Enterprise Portal database for this purpose.

You can also create additional database records to store attachments by using the same structure that is defined in PS\_EPPCM\_DOCINDB. Assign them to the desired tablespace.

---

**Note.** You should discuss these options with the database and system administrators and consider the advantages and disadvantages of each. Physical storage requirements, backup procedures, virus scanning, and access rights should all be considered. You can implement Content Management by using one or both options.

---

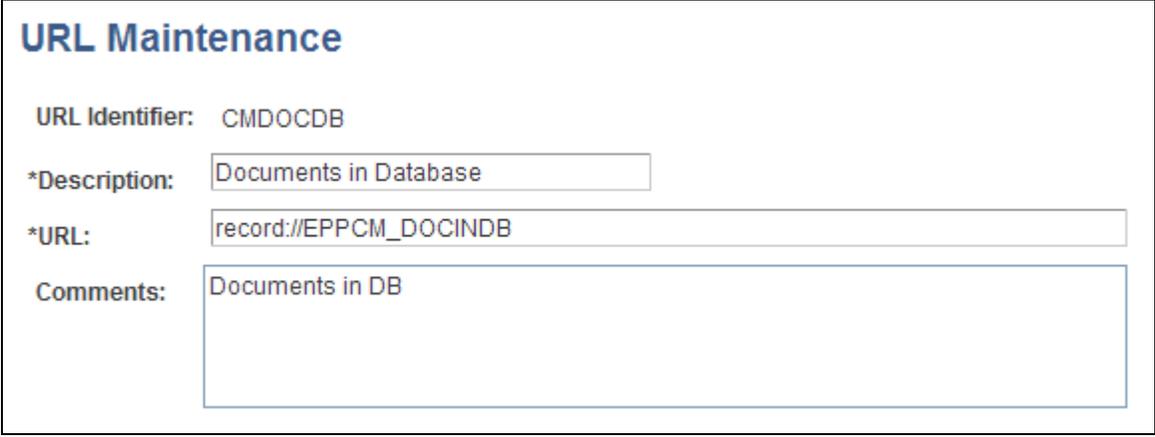
### **Security for File Attachments**

Security within content management is enforced through the member and privilege set concept. Document content is accessible by members of all folder locations where the content resides.

See the "Securing Your PeopleSoft System in a Web Environment" red paper on the My Oracle Support website.

### **Setting Up URL Addresses for Document Storage**

Access the URL Maintenance page (select Content Management, Administration, File Storage; click the Edit link that is associated with the desired URL ID on the File Storage page).



The screenshot shows a web form titled "URL Maintenance". It contains the following fields:

- URL Identifier:** CMDOCDB
- \*Description:** Documents in Database
- \*URL:** record://EPPCM\_DOCINDB
- Comments:** Documents in DB

URL Maintenance page

The system administrator is responsible for setting up actual URL addresses for document storage. This must be completed before you use the Content Management Attachment Locations page.

**URL Identifier** Name that uniquely identifies the URL that is entered on the search page. This name appears later as the selection on the Content Management's Define File Storage page.

See [Chapter 2, "Setting Up the Content Management System," Defining Document Storage Locations, page 21.](#)

**Description** Enter a meaningful description for this URL identifier. This value appears on the File Storage page.

- URL** Enter the location of the document repository. The required formats are:
- FTP File server: `ftp://user:password@fileservers`.
  - BLOB in database: `record://recordname`.
- Comments** Add any additional comments about this URL identifier.
- URL Properties** Click to access the URL Properties page, where you can specify or update URLs. URLs that are saved here can be referenced from page controls such as a button or link. The associated URL can be either an internet or intranet link.
- See Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration, Using PeopleTools Utilities, Using Administration Utilities, URL Maintenance

### Using Document File Storage Locations

A folder administrator selects document file storage locations when he or she creates new Managed Content folders, News Publication sections, or Categorized Content taxonomy folders.

See [Chapter 4, "Setting Up and Working With Managed Content," page 81](#); [Chapter 5, "Setting Up and Working with Categorized Content," page 151](#) and [Chapter 7, "Setting Up and Working With News Publications," page 195](#).

Each time that a new version of a document file is attached, the Content Management feature stores the document location's URL identifier of the current Managed Content folder. Upon later retrieval, the system dynamically creates a fully qualified URL address by appending the information that is stored in the ATTACHSYSFILENAME field to the underlying URL address that is associated with the URL identifier.

The following table lists the fields that the system uses to store this data:

<b><i>EPPCM_DOC Record Field Names</i></b>	<b><i>Usage</i></b>
URL_ID	The URL identifier description from the PeopleTools URL table. Underlying the identifier is the full URL address of the server and directory location where the file is stored.  For example, CMDOCFS is the URL identifier for the defined URL address: <i>ftp://userID:password@fileservers/directory</i> .
ATTACHSYSFILENAME	The unique file name that is assigned by the system each time a new version of the document is saved. It is composed of the content ID, a version ID, and the name of the file itself, for example, 10403ROI.pdf.
ATTACHUSERFILE	The original name of the uploaded file, for example, ROI.pdf.

<b>EPPCM_DOC Record Field Names</b>	<b>Usage</b>
URL	This field is not used.

If the administrator exchanges the document location for a Managed Content folder, the folder content might be spread across multiple physical locations. Changing a file server location does not change the URL\_ID references for previously created document file versions, and everything should still work correctly. However, if the underlying URL address for an identifier is changed, you can no longer access previously stored content unless it is physically moved to the new location.

---

**Note.** Content can be shared between multiple Managed Content folders. If the content is checked out and revised from multiple folders, the various versions of one content entry might be located in different physical locations if each Managed Content folder is assigned a different document location. The URL ID is based on the document location that is assigned to the current folder at the time of attachment.

---

**Important!** If you are in a DB2 OS/390 and z/OS environment, restrictions are placed on file attachment sizes. You are limited to chunk sizes of 3862 for a 4K tablespace or 32444 for a 32K tablespace.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleCode Developer's Guide*, "Understanding File Attachments and PeopleCode," Using File Attachments in Applications, Using Chunking With Attachments.

## Setting Up an FTP Service for Image Attachments

Images are not attached to the storage location that is specified by the Managed Content folder. Images are always attached to the FTP server that is set up in the PeopleTools URL table with the EPPCM\_IMAGE identifier. You need to verify that the identifier is updated with your specific environment information. To render image files as actual images, the FTP service must exist in a web server directory in the PeopleSoft domain.

To set up the FTP service in a web server directory in the PeopleSoft domain, you must complete the following tasks:

- Extend the web server directory to include the folder path *ps/images/portal\_pa/*.
- Create an FTP service on the web server machine with an absolute path to the extended folder path of the web server directory.
- Set the FTP path in the EPPCM\_IMAGE URL identifier definition to point to the created FTP service.
- Update the Image Attachment URL Path field on the Portal Solutions Installation Options page to contain the web server's relative or absolute URL of the extended path that will contain the image files from the FTP server.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Defining Installation Options.

This setup is fully documented in the *PeopleSoft Enterprise Portal 9.1 Installation Guide*, which is available on My Oracle Support.

---

**Note.** If you are using DB2, size limitations exist for images to be saved to the database based on the database platform.

---

## Purging and Inactivating Content

This section provides an overview of purging and inactivating content and discusses how to:

- Purge and inactivate content.
- Preview items selected from the Purge/Inactivate page.

## Understanding Purging and Inactivating Content

You use the Purge/Inactivate page to set parameters for the Purge/Inactivate process, an Application Engine program. You can set up the Purge/Inactivate process to perform one of several actions depending on the selected feature within the content management system:

- *Delete Past Versions* deletes the noncurrent versions of a piece of content.  
Only the last approved version and any successive versions of the content are retained.
- *Purge Items* deletes content, folders, or both from the system.  
This action excludes folders that do not allow deletes and content in folders that do not allow deletes.
- *Set Inactive Date* updates the inactive date for the selected content.
- *Unpublish Content* changes the content's status from published to pending (or blank).

Only items that meet all of the selection criteria are processed.

---

**Note.** Use care in selecting and processing items from this page. Content or folders that are purged from the system cannot be retrieved.

---

## Pages Used to Purge and Inactivate Content

Page Name	Definition Name	Navigation	Usage
Purge/Inactivate	EPPCM_PRG_RUN	Content Management, Administration, Purge/Inactivate	Purge content or folders, inactivate content, unpublish content, or delete versions from the Content Management system.
Purge/Inactivate - Preview Selection	EPPCM_PRG_VIEW	Content Management, Administration, Purge/Inactivate  On the Purge/Inactivate page, click the Preview button.	Preview items to be purged or inactivated.

Page Name	Definition Name	Navigation	Usage
Process Scheduler Request	PRCSRQSTDLG	Content Management, Administration, Purge/Inactivate  Click the Run button on the Purge/Inactivate page.	Specify process variables.

## Purging and Inactivating Content

Access the Purge/Inactivate page (select Content Management, Administration, Purge/Inactivate).

Purge/Inactivate page

Options available to use on this page are based on the feature definition. For example, with Managed Content, if you select to purge content, the system purges only unpublished content. If you select to delete past versions, the system deletes versions prior to the last approved one.

---

**Warning!** Use care in selecting and processing items from this page. Content or folders that are purged from the system cannot be retrieved.

---

- Run Control ID**            Displays the run control ID for the purge/inactive process.
- Report Manager**        Click to access the Report Manager module to view report results.
- Process Monitor**        Click to access the Process Monitor to view the status of job requests.

- Preview** Click to view the pieces of content, folders, published menu items, and pagelet definitions that have been selected and what action will be performed on them on the Purge/Inactive - Preview Selection page.
- See Chapter 2, "Setting Up the Content Management System," Previewing Items Selected from the Purge/Inactivate Page, page 30.
- Run** Click to access the Process Request page, where you can start the Application Engine process to purge or inactivate content or folders.
- See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests."
- Feature** Select a feature from the drop-down list box to perform. The available features are:
- *Categorized Content*
  - *Collaborative Workspaces*
  - *Managed Content*
  - *News Publications*

**Action**

These are the available actions:

- *Delete Past Versions* deletes unused versions.

Only the last approved version and any successive versions are retained. This option is available only for features that enable content versions and excludes the following items: content without an approved version, content without any versions prior to the last approved version, and content that did not originate in the selected feature.

Folders are not included in this action.

- *Set Inactive Date* updates the selected content to the date specified in the *Inactive Date* field.

A blank Inactive Date field clears the inactive date of the selected content. The Set Inactive Date action excludes content that did not originate in the selected feature.

- *Purge Items* deletes the content, folders, or both from the system.

The Purge Items action excludes:

- Folders that do not allow deletes.
- Content in folders that do not allow deletes, including:

Any published content (and the parent folder path) when the Include Published Content option is not selected or is not available for the feature.

Folders listed in a feature definition as a one-top folder or as a share folder.

All folders when the Folder Cascade option is set to *Only Content*.

- *Unpublish Content* changes the publish status of the content location from *published* to *pending* (or blank).

The Unpublish Content action is available only for features that publish within the Content Management system.

**Include Published Content**

This field appears if the Action field is set to *Purge Items*.

Select this option to include published content in the action.

**Inactive Date**

This field appears if the Action field is set to *Inactive Date*.

Select a date to use as the date that the content is considered inactive.

Leaving this field blank creates a blank inactive date for the content.

**Selection**

Select whether the specified action should be performed on Content or on a Folder.

When you select the Folder option, this selection becomes your starting folder.

- Site Name** This field appears if the Folder option is selected.  
Select the name of the site if you select to purge folders.
- Folder** This field appears if the Folder option is selected.  
Select the folder name and ID if you are purging folders.
- Folder Selection Options** Select the Only Direct Content Children option if the content is published in more than one location. This action is performed only on the children content directly under the folder.  
Select the Cascade to All Child Items option to perform action on child folder and child content.
- Folder Cascade Options** This section appears if the Cascade to All Child Items option is selected. The available options are:
- *Only Content*  
In the folder that you have selected, only the content is acted upon and not the folders.
  - *Folders and Content*  
Enables you to select the folders and the content.
  - *Purge Selected Folder*  
Select to purge the folder.

### **Content Selection Options**

The Content Selection Options section includes these options:

- *Content ID* enables you to select a comparison operator and a content ID.
- *Created by User ID* enables you to select a comparison operator and a user ID.
- *Expire Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Inactive Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Last Updated Date* enables you to select a comparison operator and a date from the calendar or the current date.
- *Last Updated by User ID* enables you to select a comparison operator and a user ID.

## **Previewing Items Selected from the Purge/Inactivate Page**

Access the Purge/Inactivate - Preview Selection page (select Content Management, Administration, Purge/Inactivate; click the Preview button on the Purge/Inactivate page).

**Purge / Inactivate**

### Preview Selection

The following lists the items selected for the action. Click 'View All' in the grid header(s) to display all of the selected items. Click the Content Title to preview the content. Click 'Properties' to access the item definition.

**Run Control ID:** CM\_TEST  
**Feature:** News Publications  
**Action:** Set Inactive Date

Content Selection					
Content Location		Selection Details		Content Details	
Content ID	Content Title	Folder ID	Folder Title	Publish Status	
1001	<a href="#">Grand Opening in Milano</a>	1039	Events	Published	<a href="#">Properties</a>
1001	<a href="#">Grand Opening in Milano</a>	1033	Headline News	Published	<a href="#">Properties</a>
1003	<a href="#">Bring Your Parents to Work Day</a>	1033	Headline News	Published	<a href="#">Properties</a>
1004	<a href="#">Get the Weather Report</a>	1033	Headline News	Published	<a href="#">Properties</a>
1005	<a href="#">SchoolHouse Rocks</a>	1039	Events	Published	<a href="#">Properties</a>

[Return](#)

Purge/Inactivate - Preview Selection page: Content Location tab

The Purge/Inactivate - Preview Selection page: Content Location tab enables you to preview the list of items that will be affected by the Purge/Inactivate process. If you select a folder to purge, and the folder is published as a pagelet or a menu item, the folder and all its content is purged.

### ***Selection Details Tab***

Access the Purge/Inactivate - Preview Selection page: Selection Details tab (select Content Management, Administration, Purge/Inactivate; click the Preview button, and select the Selection Details tab).

**Purge / Inactivate**

---

**Preview Selection**

The following lists the items selected for the action. Click 'View All' in the grid header(s) to display all of the selected items. Click the Content Title to preview the content. Click 'Properties' to access the item definition.

Run Control ID: CM\_TEST  
 Feature: News Publications  
 Action: Set Inactive Date

Content Selection						
Customize   Find   View All   [Print]   [Calendar]   First   1-5 of 26   Last						
Content Location		Selection Details		Content Details		
Content ID	Content Title	Inactivate	Expire	Updated	Updated By	Created By
1001	<a href="#">Grand Opening in Milano</a>			12/19/2004	VP1	PTDMO
1001	<a href="#">Grand Opening in Milano</a>			12/19/2004	VP1	PTDMO
1003	<a href="#">Bring Your Parents to Work Day</a>			12/12/2004	VP1	PTDMO
1004	<a href="#">Get the Weather Report</a>			12/12/2001	PTDMO	PTDMO
1005	<a href="#">SchoolHouse Rocks</a>			12/18/2004	VP1	PTDMO

[Return](#)

Purge/Inactivate - Preview Selection page: Selection Details tab

**Content Details Tab**

Access the Purge/Inactivate - Preview Selection page: Content Details tab (select Content Management, Administration, Purge/Inactivate; click the Preview button, and select the Content Details subtab).

**Purge / Inactivate**

---

**Preview Selection**

The following lists the items selected for the action. Click 'View All' in the grid header(s) to display all of the selected items. Click the Content Title to preview the content. Click 'Properties' to access the item definition.

Run Control ID: CM\_TEST  
 Feature: News Publications  
 Action: Set Inactive Date

Content Selection			
Customize   Find   View All   [Print]   [Calendar]   First   1-5 of 26   Last			
Content Location		Content Details	
Content ID	Content Title	Content Type	Content Origin
1001	<a href="#">Grand Opening in Milano</a>	Text or HTML	News Publications
1001	<a href="#">Grand Opening in Milano</a>	Text or HTML	News Publications
1003	<a href="#">Bring Your Parents to Work Day</a>	Text or HTML	News Publications
1004	<a href="#">Get the Weather Report</a>	Web Site URL	News Publications
1005	<a href="#">SchoolHouse Rocks</a>	Text or HTML	News Publications

[Return](#)

Purge/Inactivate - Preview Selection page: Content Details tab

When you select the Versions option on the Content Versions page, the Content Details tab shows the different content versions being acted upon.

### **Content Versions Tab**

The Content Versions page lists each version of the content and gives you the status of the action that will occur to each version of the content. The system retains the Max Approved version, which is also the last updated date, and any version thereafter. The system deletes any version before the Max Approved version.

See [Chapter 4, "Setting Up and Working With Managed Content," Managing Versions, page 131.](#)

## **Defining Features**

This section discusses how to:

- Set feature definitions.
- Set component options.
- Define content types.

## **Pages Used to Define Features**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Feature Definitions	EPPCM_CATG_TYPE	Content Management, Administration, Feature Definitions	Configure content management features.
Component Types	EPPCM_COMP_TYPE	Content Management, Administration, Feature Definitions Select the Component Types tab.	Control the page display and link destinations between content management components.
Content Types	EPPCM_CONT_TYPE	Content Management, Administration, Feature Definitions Select the Content Types tab.	Control the content types that are available when you add content from components.

## **Setting Feature Definitions**

Access the Feature Definitions page (select Content Management, Administration, Feature Definitions).

**Feature Definitions** | Component Types | Content Types

### Categorized Content

Configure the Content Management feature definition.

**Feature Settings**

\*Top Breadcrumb Label:

Shared Site Name:

Shared Folder ID:  Shared Content

\*Days to Show as New:

\*Disable Child Count if Rows >:

Content Properties	Folder Properties	Viewer Display
<input checked="" type="checkbox"/> Enable Content Notification	<input checked="" type="checkbox"/> Enable Folder Viewer Roles	<input checked="" type="checkbox"/> Show Page Title on Viewer
<input checked="" type="checkbox"/> Enable Content Comments	<input checked="" type="checkbox"/> Auto Inherit Members	<input checked="" type="checkbox"/> Show Content Title on Viewer
<input checked="" type="checkbox"/> Enable Content Discussions	<input checked="" type="checkbox"/> Show Folder Summary	<input checked="" type="checkbox"/> Show Info on HTML Viewer
<input checked="" type="checkbox"/> Enable Content Search		<input checked="" type="checkbox"/> Show Assoc. Image on Viewer
<input checked="" type="checkbox"/> Show Content Source		<input checked="" type="checkbox"/> Show Modified Date on Viewer
<input checked="" type="checkbox"/> Show Content Summary		<input checked="" type="checkbox"/> Show Source on Viewer
<input checked="" type="checkbox"/> Show Content Inactive Date		<input checked="" type="checkbox"/> Show Summary on Viewer

Feature Definitions page

---

**Note.** The options that appear on this page depend on the feature that you selected on the search page.

---

### ***Feature Settings***

**Top Breadcrumb Label** Lists the breadcrumb label to use to access the list of accessible top folders.

**Top Folder ID** The ID of the top folder type.

**Shared Site Name** Select a site name from the prompt.  
This is used as the default value to store shared content.

**Shared Folder ID** Used as the default value (the selected folder cannot be deleted).  
This is prompted from the Managed Content Folder, where content can be published.

**Days to Show as New** Specify how many days the star icon will appear indicating that the content item has been recently added for the hierarchy or news display.

**Disable Child Count if Rows >** Enter a limit for hierarchy page row processing.  
Limits count display and location path on user pages.

## Content Properties

Options selected in the Content Properties group box enable these functions in the respective Content Management features. These options include whether a field is available for display or editing; or whether a subfeature such as notifications are enabled within a Content Management feature.

---

**Note.** If an option is not available for selection, then that option is not enabled at the system level for that Content Management feature.

---

<b>Enable Content Notification</b>	Select to show the Notify link on content properties to access interested parties and ad hoc notifications.
<b>Enable Content Comments</b>	Select to show the Comments link on content properties.
<b>Enable Content Discussions</b>	Select to enable creation or viewing of discussions based on the current content item.
<b>Enable Content Search</b>	Select to show the Search link on content properties and in the hierarchy. Search uses Verity to search for content.
<b>Show Content Source</b>	Controls the display of the content source on content properties. This option can be edited on all features with enabled Content Management.
<b>Show Content Summary</b>	Controls the display of content summary on content properties. This option can be edited on all features with enabled Content Management.
<hr/>	
	<b>Note.</b> Content summary is required with News Publication pagelets, for use in top stories. Therefore, this option cannot be edited for News Publication pagelets.
<hr/>	
<b>Show Content Inactive Date</b>	Controls the display of the inactive date on content properties. This option can be edited on all features with enabled Content Management.

## Folder Properties

Options selected in the Folder Properties group box enable these functions in the respective Content Management features.

<b>Enable Folder Viewer Roles</b>	Select to enable adding folder viewer roles in Categorized Content. This option sets viewer security in the Hierarchy Viewer pages (from published folders) to use the folder viewer roles instead of the viewer privilege. The Categorized Content requires viewer roles for the Browse by Category feature.
<hr/>	
	<b>Note.</b> When publishing content with security roles, the system publishes based on your defined viewer roles rather than member privileges if this option is selected.
<hr/>	

- Auto Inherit Members** When a child folder is created, the system automatically inserts parent members and privileges.
- Show Folder Summary** Controls the display of the summary on folder properties and hierarchy management.  
This option can be edited on all features with enabled Content Management.

### ***Viewer Display***

Content created or stored in PeopleSoft Content Management can be viewed from a variety of feature areas in the PeopleSoft Enterprise Portal. For example, you can view content when selecting an article in the News Publication feature, when clicking a search results content link, or when selecting preview in any of the Content Management features.

The content is rendered in a viewer page. The viewer pages can be configured to show or hide the source, modified date, or an associated image based upon the feature type settings. Because HTML content often comes with its own images and summary, an additional flag also exists to show or hide content information for HTML type content. This flag setting overrides the settings for the source, modified dates, summary, and images when the content is HTML. This setting also enables the administrator to show the summary, source, image, or modified date on file or URL content, but hide it on HTML content.

- Show Page Title on Viewer** Select to display the page title on render content (viewer or preview modes).
- Show Content Title on Viewer** Select to display the content title on render content (viewer or preview modes).
- Show Info on HTML Viewer** Select to display the source, modified dates, image, and summary on HTML content on render content (viewer or preview modes).  
This setting overrides other settings for the viewer when it is HTML-type content.
- Show Assoc. Image on Viewer** (show associate image on viewer mode) Select to display associated images on render content (viewer or preview modes).
- Show Modified Date on Viewer** Select to display the modified date on render content (viewer or preview modes).  
Also affects the hierarchy viewer grid from published Content Management folders.
- Show Source on Viewer** Select to display the source on render content (viewer or preview modes).  
Also affects the hierarchy viewer grid from published Content Management folders.
- Show Summary on Viewer** Select to display the summary on render content (viewer or preview modes).  
Also affects the hierarchy viewer grid from published Content Management folders.

## Setting Component Options

Access the Component Types page: Folder and Content tab (select Content Management, Administration, Feature Definitions; select the Component Types tab).

Feature Definitions
Component Types
Content Types

Categorized Content

The component type controls the page display and hyperlink destinations between components.

Component Type				
Component Type	*Main Page Title	Add Folder Label	Add Content Label	Add Content Page Title
Browse	Browse by Category			
Browse Top	Browse by Category			
Maintain Folder	Folders Properties			
Maintain Content	Content Properties			
Discuss Content	View Discussions			
Maintain Top Folder	Top Folder Properties			
Hierarchy	Browse Categorized Content	Add Folder	Add Content	Add Content
Review Content	Review Categorized Content			
Render Content	Render Content URL			
Search Content	Search Content			
My Content Status	My Categorized Content Status			
Sub Hierarchy	Browse Categorized Content	Add Folder	Add Content	Add Content
Top Hierarchy	Browse Categorized Content	Add Top Folder		
Unpublish Content	Unpublish Crawled Categorized			
My Content	My Categorized Content		Add Content	Add Content
View Content	View Content			

Component Types page: Folders and Content tab

The Component Types page: Folders and Content tab controls the page title and the button labels on the components.

### Viewing Component Details

Access the Component Types page: Component Details tab (select Content Management, Administration, Feature Definitions; select the Component Types tab; then select the Component Details subtab).

Feature Definitions   **Component Types**   Content Types

Categorized Content

The component type controls the page display and hyperlink destinations between components.

Component Type				
Component Type	Menu Name	Component	Page Name	Folder ID Prompt
Browse	EPPCM_CONTENT_MGMT	EPPCM_BRWS	EPPCM_BRWS_MAIN	
Browse Top	EPPCM_CONTENT_MGMT	EPPCM_BRWS_TOP	EPPCM_BRWS_MAIN	
Maintain Folder	EPPCM_CONTENT_MGMT	EPPCM_DEFN_CATG	EPPCM_CATG_MAIN	
Maintain Content	EPPCM_CONTENT_MGMT	EPPCM_DEFN_CONT	EPPCM_CONT_MAIN	
Discuss Content	EPPDF_DISCUSSION_FORUM	EPPDF_TOPIC	EPPDF_VIEW_TOPIC	
Maintain Top Folder	EPPCM_CONTENT_MGMT	EPPCM_DEFN_TCATG	EPPCM_CATG_MAIN	
Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIERARCHY	EPPCM_HIER_MAIN	
Review Content	EPPCM_CONTENT_MGMT	EPPCM_INQ_CONT	EPPCM_INQ_MAIN	
Render Content	EPPCM_CONTENT_MGMT	EPPCM_RNDR_CONT	EPPCM_RNDR_MAIN	
Search Content	EPPCM_CONTENT_MGMT	EPPCM_SRCH_CONT	EPPCM_SRCH_MAIN	
My Content Status	EPPCM_CONTENT_MGMT	EPPCM_STAT_CONT	EPPCM_STAT_MAIN	
Sub Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIER_SUB	EPPCM_HIER_MAIN	
Top Hierarchy	EPPCM_CONTENT_MGMT	EPPCM_HIER_TOP	EPPCM_HIERTOP_MAIN	
Unpublish Content	EPPCM_CONTENT_MGMT	EPPCM_SPIDR_PBL	EPPCM_SPIDR_PBL	
My Content	EPPCM_CONTENT_MGMT	EPPCM_USER_CONT	EPPCM_USER_MAIN	EPPCM_CATG_PWW
View Content	EPPCM_CONTENT_MGMT	EPPCM_VIEW_CONT	EPPCM_VIEW_MAIN	

Component Types page: Component Details tab

The Component Types page: Component Details tab controls the link destinations between components.

## Defining Content Types

Access the Content Types page (select Content Management, Administration, Feature Definitions; select the Content Types tab).

Feature Definitions   Component Types   **Content Types**

**Categorized Content**

The content type controls what content types are available when adding content from the listed component.

Content Types		Find      	First  1-27 of 27  Last
*Component Type	*Content Type		
Maintain Content 	File Attachment 		
Maintain Content 	Text or HTML 		
Maintain Content 	Image Attachment 		
Maintain Content 	Image URL 		
Maintain Content 	Menu Item 		
Maintain Content 	Web Site URL 		
Hierarchy 	File Attachment 		
Hierarchy 	Text or HTML 		
Hierarchy 	Image Attachment 		
Hierarchy 	Image URL 		
Hierarchy 	Menu Item 		
Hierarchy 	Web Site URL 		
Hierarchy 	Managed Content 		
Sub Hierarchy 	File Attachment 		
Sub Hierarchy 	Text or HTML 		
Sub Hierarchy 	Image Attachment 		

Content Types page

The Content Types page controls what content types are available when you add content from the listed component type.

---

## Migrating Content

This section provides an overview of the content migration and discusses how to:

- Configure the source and target systems.
- Set up content migration.
- Steps used to migrate content.
- Preview content migration.
- Steps used to preview content migration.

- Approve content migration.
- Run content migration.
- Review content migration results.
- Manage content migration by status.
- Complete content migration.

## Understanding Content Migration

Content migration is an easy end-to-end solution that you can use to migrate content data being developed in a staging database before it is required on the production database. A content migration cycle consists of:

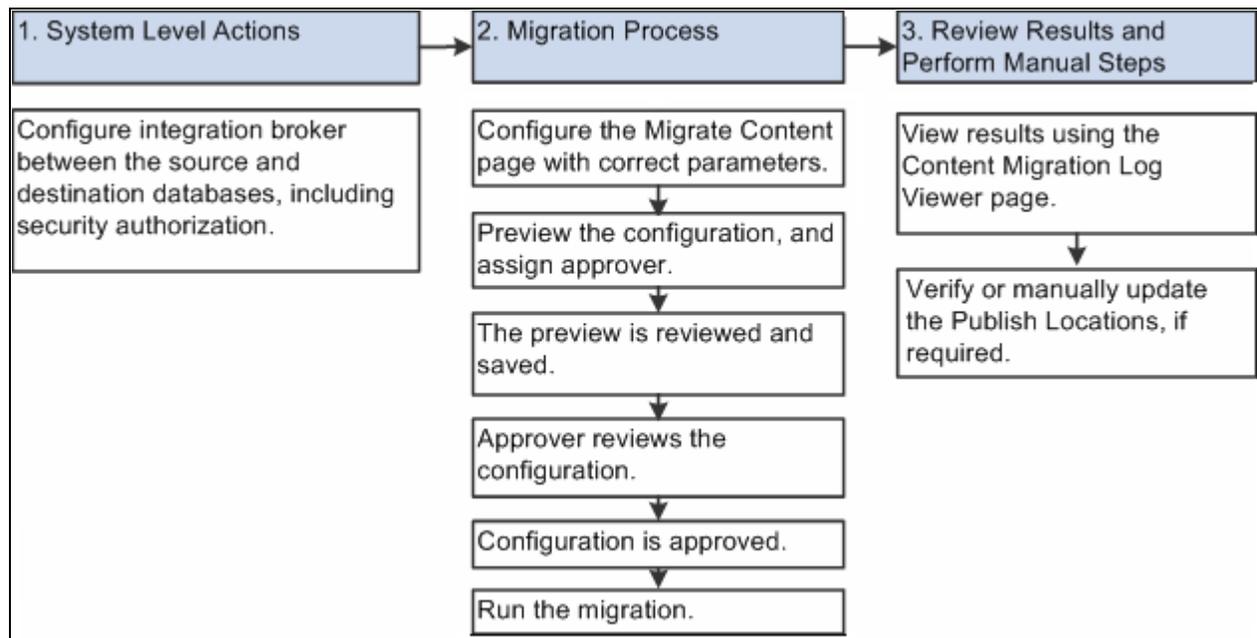
- Configuring and setting approver.
- Previewing results and sending notification to approver.
- Previewing and approving the data by approver.

The preview and approval processes can be repeated many times per migration cycle if multiple approval phases are necessary.

- Running migration.

After the content migration is run, the migration cycle is complete regardless of whether it succeeds or fails. And then, a new migration ID is generated for the next migration cycle.

This diagram provides a high-level overview of requirements to run content migration:



High-level overview of requirements to run content migration

In a migration process:

- Each migration cycle—from migration definition creation to data validation and actual execution—is identifiable by a migration ID, and complete logs for each migration cycle are available in both source and target databases.
- The security authorization for the process execution can be set as appropriate in Integration Broker gateway, Integration Broker messages security, Application Engine process security, Content Migration page, and Log Viewer page.

See *Enterprise PeopleTools 8.50 PeopleBook*, PeopleSoft Integration Broker.

See *Enterprise PeopleTools 8.50 PeopleBook*, PeopleSoft Application Engine.

See [Chapter 2, "Setting Up the Content Management System," Setting Up Content Migration, page 42.](#)

- Previewing of the expected results is required before a migration can occur.  
See [Chapter 2, "Setting Up the Content Management System," Previewing Content Migration, page 50.](#)
- Source folders with *Require Approval* setting need migration approval.  
Source folders with *Optional Approval* or *Auto-Approved Content* setting do not need migration approval.  
See [Chapter 2, "Setting Up the Content Management System," Creating a Top Folder, page 15.](#)
- Content security authorization is not migrated to the target database, and content owner and administrator are responsible for setting as appropriate.

Security is inherited from the target folder set for the migration.

## Pages Used to Migrate Content

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Migrate Content	EPPCM_MIG_RUN	Content Management, Administration, Migrate Content	Migrate content data being developed in a staging database before it is required on the production database.
Content Migration - Preview Selection	EPPCM_MIG_PVIEW	Content Management, Administration, Migrate Content Click the Preview button on the Migrate Content page.	Preview your selections before the content is migrated and determine whether the content can be migrated. Also define actions for each content ID when migrating.
Content Migration - Log Viewer	EPPCM_MLOG_VIEWER	Content Management, Administration, View Content Migration Log	View all changes that are associated with the content migration.
My Content Migrations	EPPCM_MIG_STATMAIN	My Content, My Content Migrations	View migration requests requiring attention.

## Configuring the Source and Target Systems

Before you perform content migration, ensure that:

- A target folder exists.
- Both target and source database are at the same Enterprise Portal version.

---

**Note.** You must set up Integration Broker for the source the target databases before you run the migration.

---

See [Appendix E, "Using Integration Broker for Content Migration," page 351.](#)

Oracle recommends that:

- Before you run the migration to a production database, follow necessary database backup and recovery procedures in the event of data corruption due to migration process failure.

Security roles, permissions, and users should be synced between the two databases.

- You run only one migration at a time to prevent conflicts that arise from concurrent migration attempts.

Content migration should be performed by users who have the Content Administrator permissions. The Content Administrator permission settings are delivered by default. Take preventive measures such as previewing the expected results using the Content Migration - Preview Selection page and requiring an approver to review the migration configuration before allowing an actual migration to occur.

Data that is migrated takes on the privileges as assigned by the target database. Because privileges are assigned to folders and not content within Content Management, privileges are inherited from the target folder ID. Viewer roles are not migrated over from the source database and instead use the viewer roles as defined in the target database.

Also note that:

- The document storage of the source folder is retained upon migration.

For example, if migrating from the source folder is defined with storage *CMDOCDB*, the content will be stored in the target folder as *CMDOCDB*.

- If migrating content for files on an ftp server, the attachment file storage of the target portal must point to the same location.

If the attachment file storage of the target portal does not point to the same location, the source file should be located using its *attachsysfilename* and manually copied to the target location.

See [Appendix E, "Using Integration Broker for Content Migration," page 351.](#)

## Setting Up Content Migration

Access the Migrate Content page (select Content Management, Administration, Migrate Content).

## Migrate Content Status: New

**Additional Instructions**

Migrate content from the local Content Management system to another Portal Solutions database. The contents are filtered by the selection options. Only items that meet ALL of the selection options will be processed. Click 'Preview' to preview the results of the selection options and set the target Action to perform for each content. Click 'Run' to schedule or run the process against the results of the selection options.

Run Control ID: MCM\_1      [Report Manager](#)    [Process Monitor](#)     

Migration ID: \_\_\_\_\_

\*Feature:

Source Location	Target Location
Source Node: LOCAL_NODE	*Target Node: <input type="text" value="Y910R20B"/>
*Site Name: <input type="text" value="EMPLOYEE"/>	Target Site: <input type="text" value="EMPLOYEE"/>
*Folder: <input type="text" value="Migrate_1"/> 2031	Target Folder ID: <input type="text" value="2052"/>
Approver: <input type="text" value="VP1"/>	

<b>Folder Selection Options</b> <input checked="" type="radio"/> Only Direct Content Children	<b>Versions</b> <input checked="" type="radio"/> All Versions <input type="radio"/> Latest Approved	<input checked="" type="checkbox"/> Include Comments <input checked="" type="checkbox"/> Include Discussions <input checked="" type="checkbox"/> Keep Publish Flag
--	---	--

**Content Selection Options**

*Content Selection Option	*Operator	Content ID	
<input type="text" value="Content ID"/>	<input type="text" value="Less Than"/>	<input type="text" value="2003"/>	+ -
<input type="text" value="Content ID"/>	<input type="text" value="Greater Than Or Equal To"/>	<input type="text" value="2001"/>	+ -

Migrate Content page

---

**Note.** This page enables you to submit the Application Engine program that launches the migration using the Integration Broker.

---

- |                        |   |
|------------------------|---|
| <b>Run control ID</b>  | Displays the run control ID of this application engine process.         |
| <b>Report Manager</b>  | Click to access the Report Manager module to view report results.       |
| <b>Process Monitor</b> | Click to access the Process Monitor to view the status of job requests. |

**Preview**

Click to run the preview Integration Broker message and display the expected results.

When you click the Preview button, the target database analyzes the information and sends back a message containing the expected result. No content changes are made to the target database. The information generated during the preview process is saved in the source and the target database. Also, in the Content Migration - Preview Selection page:

- The information of the source database and target database is displayed.
- The migration status show whether the content already exists.

After you modify the configuration as suggested, the migration can proceed.

See [Chapter 2, "Setting Up the Content Management System," Steps Used to Migrate Content, page 47.](#)

See [Chapter 2, "Setting Up the Content Management System," Reviewing Content Migration Results, page 60.](#)

**Run**

Click to access the Process Scheduler Request page, where you can start the Application Engine process to migrate content.

The results of the migration are saved and viewable on the Content Migration - Log Viewer page. A copy of the migration results is saved on the source database. A message that includes the details of content migration configuration is sent to the destination database.

See *Enterprise PeopleTools 8.50 PeopleBook*, "PeopleSoft Process Scheduler", Submitting and Scheduling Process Requests.

**Migration ID**

The migration ID is a system-generated identifier to uniquely identify a migration cycle.

After the migration is run, the migration cycle is complete regardless of whether it succeeds or fails. And then a new migration ID is generated for the next migration cycle.

<b>Feature</b>	<p>Available options are:</p> <ul style="list-style-type: none"> <li>• <i>Managed Content</i> <p>Any type of managed content—HTML, Text, URL, image, or file attachment—in all portals is available using this option.</p> </li> <li>• <i>Collaborative Workspaces (CW)</i> <p>For CW documents, a workspace is required and the same workspace must exist in the target database. You can only migrate between workspaces that have names alike.</p> <p>When this option is selected, the workspace search is available and you can select a workspace from a list of all workspaces in the system.</p> </li> </ul> <hr/> <p><b>Note.</b> All content types within managed content and collaborative workspace documents are valid for migration. For CW, documents imported from Managed Content cannot be migrated. If required, user should migrate the original content from Managed Content, and then import into the workspace.</p> <hr/>
<b>Include Comments</b>	Select to also migrate comments associated with the content.
<b>Include Discussions</b>	Select to also migrate discussions associated with the content.
<b>Keep Publish Flag</b>	<p>Select to keep the content that is published when migrated to target database.</p> <p>When this option is selected, a separate project that will be imported into the target database to satisfy the publish flags. For example, if you want to migrate content that is published using the Pagelet Wizard, you need to create a project containing the content references (CREF) and objects of the pagelet pointing to this content to be imported on the target database, and select the Keep Publish Flag option for the migration.</p> <p>When this option is deselected, you must manually re-create the publish locations. For example, if you want to migrate content that is published using the Pagelet Wizard, and you want to manually run the steps to re-create the pagelet after the content has been migrated over, you need to deselect the Keep Publish Flag option for the migration.</p>
 <b>Source Location</b>	
<b>Source Node</b>	Displays the source database information if that information is available.
<b>Site Name</b>	<p>The portal or site from which the managed content that is being copied.</p> <p>If the <i>Collaborative Workspaces</i> option is selected in the Feature field, this site name is the name of the source workspace.</p>
<b>Folder</b>	<p>The source folder of the content for migration.</p> <p>Data is updated based on folder selection as well as content criteria. You must specify the source folder of the content.</p>

<b>Approver</b>	<p>Optionally, select an approver who must review changes that are made to the Migrate Content page before migration can proceed.</p> <p>The lists of possible approvers are defined at a global level from the Enterprise Portal Options page based on a role. The role can be user-defined, but the default role is Content Administrator.</p> <p>Approval requirement is determined from the source folder approval definition.</p> <p>If approver is set in the Migrate Content page, the Run button is not active. An email notification is sent to the approver requesting that the approver access the Migrate Content page. The Approve and Reject buttons are available for approvers on this page with a link to the preview results. If the content migration is approved, the Run button is active and an email is sent to the user who created the content migration that approval has been sent. If the content migration is rejected, an email is sent to the user that the changes have not been accepted.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Managing Content Migration Approvals, page 56.</a></p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," page 5.</a></p>
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### **Target Location**

<b>Target Node</b>	Select the target database information.
<b>Target Site</b>	<p>Select the name of the portal that the content will be copied to for managed content.</p> <p>If the <i>Collaborative Workspaces</i> option is selected in the Feature field, this is the target workspace of the content.</p>
<b>Target Folder ID</b>	<p>Select the destination folder to which content will be migrated.</p> <p>This destination folder must exist.</p> <p>If the <i>Collaborative Workspaces</i> option is selected in the Feature field, the default value is 0 (for top folder).</p>

### **Folder Selection Options**

<b>Only Direct Content Children</b>	Indicates that only content that is directly in the folder will be migrated.
-------------------------------------	--

These are examples of migrating data to a target database with no conflicts:

- Migrating direct children only: suppose that content ID 45, 60, and 89 are residing in the source folder. After the migration, all content ID (45, 60, and 89) will be migrated to the target folder ID.
- Migrating direct children only: Suppose that content ID 45, 60, and 89 are residing in the source folder, with a criterion migrate only data with content ID greater than 50. After the migration, content 60 and 89 will be migrated to the target folder ID.

This is an example of migrating data to a target database with conflict: Suppose that content ID 145 exists in the source database and this content ID 145 also exists in the target database. With a default action of *Skip*, the data is not migrated. With an action of *Create new ID*, the data is migrated but with a new content ID as assigned by the target system. With an action of *Create new version*, the data is migrated to the same content ID but is added as the latest version of the content.

## Versions

**Versions** Select *All Versions* to migrate all versions, or select *Latest Approved* to migrate only the latest approved version of the content.

## Content Selection Options

This section enables you to specify the criteria you can use to select content.

**Content Selection Option** Available options are:

- *Content ID*: At least one row of criteria is required and multiple rows of criteria are combined by AND when the system generates the SQL query.
- *Folder ID*: The criteria is optional and all content within the folder will be migrated by default.
- *Created by User ID*: The User ID search is active.
- *Last Updated Date*: The User ID search is active.
- *Last Updated by User ID*: The Date search is active.

**Operator** Available options are:

- *Equal To*
- *Greater Than*
- *Greater Than or Equal To*
- *Less Than*
- *Less Than or Equal To*
- *Not Equal to*

## Steps Used to Migrate Content

This section discusses how to:

- Migrate content that already exists in the target database.
- Migrate content that does not exist in the target database.
- Migrate content with discussions.

- Migrate content without discussions.
- Inquire migrations.

### ***Migrating Content that Already Exists in the Target Database***

To migrate content that already exists in the target database:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or select an existing one.
3. Confirm that at least two of the contents selected already exist in the target database.
4. Of the two existing contents in the target database, verify the default action as *Skip if Exists* for one content and set action to *Create New ID* for the other content.
5. Save your settings.
6. If approval is required, get the run control approved.
7. Click the Run button to submit the migration and verify the process runs to *Success*.
8. In the target database, access the target folder and note that:
  - The content with action *Create new ID* has been added with the Migration ID of the target database.
  - The content with action *Skip* has not been added.
9. In the target database, select Content Management, Administration, View Content Migration Log.
10. Select the Migration ID and verify the Results log that shows only the added content.
11. In the source database, select Content Management, Administration, View Content Migration Log.
12. Select the Migration ID and verify the Results log that is the same as the log of the target database.

### ***Migrating Content that Does Not Exist in the Target Database***

To migrate content that does not exist in the target database:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or select an existing one.
3. Confirm that at least two of the contents selected do not exist in the target database.
4. Of the two existing contents in the target database, verify the default action as *Create New ID* for one content and set action to *Skip if Exists* for the other content.
5. Save your settings.
6. If approval is required, get the run control approved.
7. Click the Run button to submit the migration and verify the process runs to *Success*.

8. In the target database, access the target folder and note that:
  - The content with action *Create New ID* has been added with the next Content ID of the target database.
  - The content with action *Skip* has been added with the Content ID of the source database.
9. In the target database, select Content Management, Administration, View Content Migration Log.
10. Select the Migration ID and verify the Results log that shows the added contents.
11. In the source database, select Content Management, Administration, View Content Migration Log.
12. Select the Migration ID and verify the Results log that is the same as the log of the target database.

### ***Migrating Content with Discussions***

To migrate content with discussions:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or modify an existing one.
3. Select a content with discussions.
4. Select the Include Discussion option.
5. Run the migration.
6. Verify in the target database that migrated content has discussions.

### ***Migrating Content Without Discussions***

To migrate content without discussions:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or modify an existing one.
3. Select a content with discussions.
4. Clear the Include Discussion option.
5. Run the migration.
6. Verify in target database that migrated content does not has discussions.

### ***Inquiring Migrations***

To inquire migrations:

1. Select Content Management, Administration, Migrate Content.
2. Select an existing run control.

3. Note that:

- All input fields are available for the processes that have a status of *Previewed*, *Approved*, or *Rejected*.
- All input fields are not available, except the Preview button, for the processes that have a status of *Awaiting Approval* or *Success*.

## Previewing Content Migration

Access the Content Migration - Preview Selection page (select Content Management, Administration, Migrate Content; click the Preview button from the Migrate Content page).

**Migrate Content**  
**Preview Selection**

The following lists the items selected for the action. Click 'View All' in the grid header(s) to display all of the selected items. Click the Content Title to preview the content. Click 'Properties' to access the item definition. Click 'Versions' (in the 'Content Details' grid tab) to review the effected versions.

Run Control ID: MCM\_1  
 Migration ID  
 Feature: Managed Content  
 Target Folder ID: 2052  
 Include Comments: Y  
 Include Discussions: Y  
 Keep Publish Flag: Y  
 Folder Options: Direct  
 Versions: All Versions

Run Control Created: 07/17/09 10:28:18AM  
 Run Control Last Modified:  
 Run Operator Id:

Content ID	Content Title	Migration Status	Action	Inactive Date	Expire Date	Last Updated	Last Updated By	Created By User ID
2001	<a href="#">Migrate_doc1</a>	Skip	Skip If Exists			07/16/2009	VP1	VP1
2002	<a href="#">Migrate_doc2</a>	Skip	Create New ID			07/16/2009	VP1	VP1

Return

Content Migration - Preview Selection page, Selection Details tab

- Run Control ID** Displays the run control ID that is used for the migration process.
- Migration ID** Displays the ID of the content migration attempt.
- Feature** Indicates the features to which the content is migrating.  
Value is either *Managed Content* or *Collaborative Workspaces*.
- Target Folder** Displays the destination folder to which content will be migrated.
- Run Control Created** Displays the ID of the user who initiates the migration, and the time that the migration was initiated.
- Run Control Last Modified** Displays the ID of the user who last modified the run control, and the time that the run control was last modified.

<b>Approver</b>	Displays the approver, if an approver exists.
<b>Approval Date</b>	Displays the approval status and the date when the migration was approved.
<b>Migrate discussion and comments</b>	Indicates whether discussions and comments will be migrated along with content.
<b>Versions</b>	Indicates the versions of the content that will be migrated.

### **Selection Details**

<b>Content ID</b>	Indicates the content ID that will be migrated.
<b>Content Title</b>	Click to access the content details page, where you can view and edit the content.
<b>Migration Status</b>	Displays the migration status of each piece of content, including: <ul style="list-style-type: none"> <li>• <i>New</i>: The content ID does not exist in the target database.</li> <li>• <i>Skip</i>: The content ID exists in the target database.</li> <li>• <i>Error</i>: An error occurred when you were trying to migrate the data.</li> </ul>

**Actions** Each content ID has its own action when migrating. The default action is *Skip If Exists* if the Migration Status is *Skip*. The default action is *Create New ID* if the Migration status is *New*. These default actions appear on the Content Migration - Preview Selection page.

Available actions are:

- *Skip If Exists*: If a content ID already exists in the target database, skip migration of this content ID.
- *Create New ID*: If a content ID already exists, use the new ID for the migrated content. If no content ID exists, use the same ID for the migrated content.

The Action column shows the action that is intended to take place. The preview process can be run multiple times per migration cycle, but only the last preview to be run has its information retained in the database. Because the preview data does not exist in the target database, only the content ID, content title (without link to the content), migration status, and action are shown when you view the preview from the destination database.

This table lists and summarizes the actions when you selected the *All Versions* option on the Migrate Content page:

<b>Action</b>	<b>Content Exists in Target Database</b>	<b>Content Does Not Exist in Target Database</b>
<i>Skip If Exists</i>	Skip the migration of this content ID.	Create all versions with the source content ID.

Action	Content Exists in Target Database	Content Does Not Exist in Target Database
Create New Version	N/A. This is not a valid action for the All Versions option.	N/A. This is not a valid action for the All Versions option.
Create New ID	Create all versions with a new content ID.	Create all versions with the source content ID.  <b>Note.</b> The Content Migration function always uses the same content ID first.

This table lists the actions when you selected the *Latest Approved* option on the Migrate Content page:

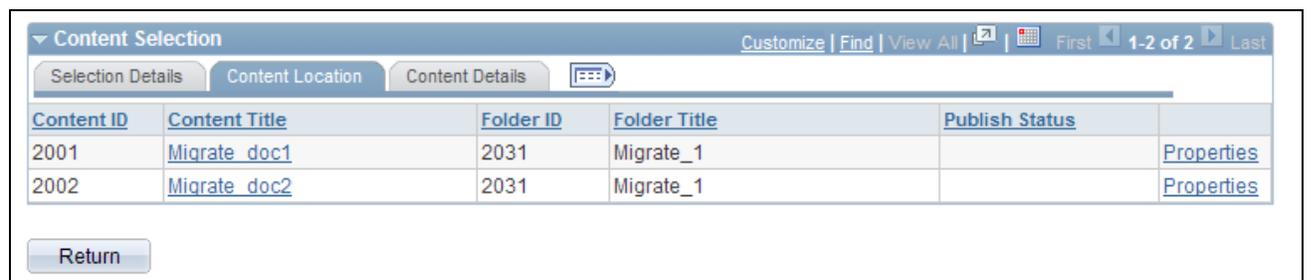
Action	Content Exists in Target Database	Content Does Not exist in Target Database
Skip If Exists	Skip the migration of this content ID.	Create the latest approved version with the source content ID and version 1.
Create New Version	Create the latest approved version with the source content ID and the next target version.	Create the latest approved version with the source content ID and version 1.
Create New ID	Create the latest approved version with a new content ID and version 1.	Create the latest approved version with the source content ID and version 1.

For example, you can migrate content 2002 and 2003 in the source database to the target database with the action set to *Create New ID*. In the target database, by default, the Last Content ID in the EO\_PE\_OPTIONS table is 2000. The Content Migration function first uses the same source content ID and adds content to target database as 2002 and 2003, because these IDs do not exist in the target database.

You can then submit a second migration process with the same content 2002 and 2003 with the action set to *Create New ID*. In this second migration, because content ID 2002 and 2003 already exist in the target database, the new content ID is auto increment from the Last Content ID *plus 1* in the EO\_PE\_OPTIONS table, so the function that generates the next ID verifies if the ID is being used. If the ID is being used, the Content Migration function assigns the next available ID. In this second migration, content 2002 is added to the target database as content 2001, and content 2003 is added to the target database as content 2004.

### Content Location

This is an example of the Content Migration - Preview Selection page, Content Location tab:



Content Migration - Preview Selection page, Content Location tab

<b>Publish Status</b>	Indicates whether the content is published, pending, approved, rejected, or draft.
<b>Properties</b>	Click to access the content properties page, where you can view and edit property details for this content.

### **Content Details**

This is an example of the Content Migration - Preview Selection page, Content Details tab:

Content ID	Content Title	Content Type	Content Origin	Versions
2001	<a href="#">Migrate_doc1</a>	File Attachment	Managed Content	<a href="#">Versions</a>
2002	<a href="#">Migrate_doc2</a>	File Attachment	Managed Content	<a href="#">Versions</a>

Return

Content Migration - Preview Selection page, Content Details tab

<b>Versions</b>	Click to access the File Attachment Properties - Content Versions page, where you can review, delete, or check out different versions of a specific content item.
-----------------	---

## **Steps Used to Preview Content Migration**

This section discusses how to:

- Preview a new content that exists in the target node.
- Preview a new content that does not exist in the target node.
- Preview an existing content that was updated.
- Preview a migration whose header was updated.
- Preview a migration whose content list was updated.
- Preview a migration that was successfully.

### **Previewing a New Content that Exists in the Target Node**

To preview a new content that exists in the target node:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control.
3. Enter values for the required fields.

For example, Source Folder, Target Folder, Target Node, and so on.

4. Set the Content Selection field to indicate the content already exists in the target database.
5. Click the Preview button.
6. Verify that the default values of the Migration Status and the Action fields are *Skip*.
7. Save your settings.

---

**Note.** If the Migration Status and the Action values are *Skip*, an error message appears requiring at least one Action value to be *Create*.

---

8. Modify and save your settings.
9. Select Content Management, Administration, View Content Migration Log.
10. Select the newly-added Migration ID.  
The Preview link is enabled and the Results link is disabled.
11. Click the Preview link.  
The Content Migration Status and Actions fields match the values on the run control.
12. Log into the target node and verify the Preview Log matches the log on the source node.

### ***Previewing a New Content that Does Not Exist in the Target Node***

To preview a new content that does not exist in the target node:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control.
3. Set the Content Selection to indicate the content does not exist in the target database.
4. Click the Preview button.

Note that:

- The Migration Status field is set to *New*.
- The Action field is set to *Create New ID*.

5. Save your settings.
6. Select Content Management, Administration, View Content Migration Log.
7. Select the newly-added Migration ID.

The Preview link is enabled and the Results link is disabled.

8. Click the Preview link.  
The Content Migration Status and Actions values match the values on the run control.
9. Log into the target node and verify the Preview Log matches the log on the source node.

### ***Previewing an Existing Content that was Updated***

To preview an existing content that was updated:

1. Select Content Management, Administration, Migrate Content.
2. Select an existing migration run control with that status of *Previewed*.
3. Click the Preview button.
4. Modify the Action option.
5. Save your settings.
6. Select Content Management, Administration, View Content Migration Log.
7. Select the Migration ID and click the Preview link.

The Action value for the updated content matches the value on the run control.

8. Log into the target node and verify the Preview Log matches the log on the source node.

### ***Previewing a Migration Whose Header was Updated***

To preview a migration whose header was updated:

1. Select Content Management, Administration, Migrate Content.
2. Select an existing migration run control with the status of *Previewed*.
3. Modify a field that does not affect the content selection.

For example, Include Comments, Include Discussions, or Keep Publish Flag.

4. Save your settings.
5. Select Content Management, Administration, View Content Migration Log.
6. Select the Migration ID and click the Preview link.

The new field value was updated to the log.

7. Log into the target node and verify the Preview Log matches the log on the source node.

### ***Previewing a Migration Whose Content List was Updated***

To preview a migration whose content list was updated:

1. Select Content Management, Administration, Migrate Content.
2. Select an existing migration run control with the status of *Previewed*.
3. Select a new source folder so there is a new set of content selected.
4. Save your settings.
5. Select Content Management, Administration, View Content Migration Log.

6. Select the Migration ID and click the Preview link.

The content list was updated to the Preview Log.

Content Migration - Preview Selection page, Content Location tab

7. Log into the target node and verify the Preview Log matches the log on the source node.

### ***Previewing a Migration That Run Successfully***

To preview a migration that run successfully:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or select an existing one.
3. Submit the run process.
4. Select an existing migration run control with the status of *Success*.

All fields are disabled and the Preview button is active.

5. Click the Preview link.

The Migration Status of the content is set from the Preview Log. For example, if the content has been successfully updated into the target node, the Content status value is the same as before the run.

## **Managing Content Migration Approvals**

Approval and request for approval occurs on the source database. If the approver is set on the Migrate Content page, the Run button is not active and an email is sent to the approver to access the Migrate Content page. The approver either approves or rejects the migration. If the approver approves the migration, the Run button is active and an email is sent to the user who created the run control that approval has been sent. If the approver rejects the migration, an email is sent to the user that the changes have not been accepted; the user can make changes to the migration configuration and repeat the migration process until it is approved.

This section discusses how to:

- Verifying content migration with the source folder that does not require approval.
- Set the source folder to skip the content migration approval.
- Submit a migration for approval.
- Approve a migration.
- Reject a migration.

### ***Verifying Content Migration with the Source Folder that Does Not Require Approval***

To view content migration with the source folder that does not require approval:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or modify an existing one.

3. Select a source folder that does not require approval.
4. Note that:

- The Approver field is not visible.

The Approver field in the Migration Content page is not visible when the Approval field in the Folder Properties page is set to *Auto-approved* or *Optional Approval*.

- The Migration Status field is set to *Previewed*.
- The Run button is visible and enabled.

### **Setting the Source Folder to Skip the Content Migration Approval**

To set the source folder to skip the content migration approval:

1. Select Content Management, Administration, Migrate Content.
2. Create a new run control or modify an existing one.
3. Select a source folder that requires approval (the Approver field is visible).
4. Clear the Approver field.
5. Preview the migration content and save your settings.

The Migration Status field is set to *Previewed*. The Submit for Approval button is visible and enabled.

### **Submitting a Migration for Approval**

To submit a migration for approval:

1. Select Content Management, Administration, Migrate Content.
2. Select a migration with the status of *Previewed* and a source folder that requires approval (a blank approver).

A source folder needs approval if the Approvals field in the Folder Properties page is set to *Requires Approval*.

3. Click the Submit for Approval button.

An error message appears requiring an approver's ID.

4. Click the Approver search icon.

User IDs appear depending on the setting of the Approver role in the Installation Options page.

5. Select an approver.

6. Save your settings.

Note that:

- The migration status changes to *Awaiting Approval*.
- All fields are disabled except the Preview button.
- An email notification is sent to the approver.

7. Select Content Management, Administration, View Content Migration Log.

8. Select the Migration ID.

The migration status was updated in the Preview Log.

### ***Approving a Migration***

To approve a migration:

1. Login as an approver.
2. Select Content Management, Administration, Migrate Content.
3. Select a migration with the status of *Awaiting Approval*.

The Reject and Approve buttons are visible and enabled.

4. Click the Approve button.

Note that:

- The Migration Status is set to *Approved*.
- All fields are enabled.
- The Run button is visible and enabled.
- The Approve and Reject buttons are invisible.
- An email notification is sent to the migration initiator.

5. Select Content Management, Administration, View Content Migration Log.

6. Select the Migration ID.

The status was updated in the Preview Log.

### ***Rejecting a Migration***

To reject a migration:

1. Login as an approver.
2. Select Content Management, Administration, Migrate Content.

3. Select a migration with the status of *Awaiting Approval*.

The Reject and Approve buttons are visible and enabled.

4. Click the Reject button.

A secondary page opens asking approver to enter an optional reason.

5. Optionally, enter a reason and click the OK button.

Note that:

- The Migration Status is set to *Rejected*.
  - All fields are enabled.
  - The Approve and Reject buttons are invisible.
  - The Preview button is visible and enabled.
  - An email notification is sent to the migration initiator.
6. Select Content Management, Administration, View Content Migration Log.
  7. Select the Migration ID.

The status was updated in the Preview Log.

## Running Content Migration

Migration is carried out by an application engine job (EPPCM\_MIG), which is a batch process. You trigger the process by clicking the Run button on the Migrate Content page.

This is an example of the Process Scheduler Request page:

**Process Scheduler Request**

User ID: VP1 Run Control ID: MCM\_1

Server Name: PSNT Run Date: 07/17/2009

Recurrence: Recurrence: Run Time: 10:48:28AM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	EPPCM_MIG	EPPCM_MIG	Application Engine	Web	TXT	<a href="#">Distribution</a>

OK Cancel

Process Scheduler Request page

After you have run your process using the Process Scheduler Request page, use the Process Monitor page to monitor the status of your process request. You use Process Monitor to:

- Check the status of your submitted process requests.
- Cancel process requests that have been initiated or are currently processing.
- Hold process requests that are queued, and queue process requests that you have put on hold.

You can also use the Process List page to view the status of submitted process requests.

## Reviewing Content Migration Results

Access the Content Migration - Log Viewer page (select Content Management, Administration, View Content Migration Log).

**Content Migration Log Detail**

**Log Viewer**

Content Selection		Customize   Find       First 1 of 1 Last		
Migration ID	Direction	Preview Logs	Migration Logs	Migration Status
1 2001	Outbound	<a href="#">Preview</a>	<a href="#">Results</a>	Success

Content Migration - Log Viewer page

**Migration ID** Displays the identification of a migration attempt.

<b>Migration Direction</b>	<p>Displays the value of <i>Source</i> or <i>Target</i>, depending on which database the log is viewed from.</p> <p>If the value is <i>Source</i>, the database from which you are viewing the log is the source database. If the value is <i>Target</i>, the database from which you are viewing the log is the target database of the migration.</p>
<b>Preview Logs</b>	<p>Click the Preview link to access the Content Migration - Preview Selection page with saved preview results based on the migration ID.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Previewing Content Migration, page 50.</a></p>
<b>Migration Logs</b>	<p>Click the Results link to access the logged results based on the migration ID.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Reviewing Content Migration Results, page 60.</a></p>
<b>Migration Status</b>	<p>Displays the progress of the migration. Available options are:</p> <ul style="list-style-type: none"><li>• <i>Migration definition created</i></li><li>• <i>Previewed</i></li><li>• <i>Awaiting approval</i></li><li>• <i>Approved</i></li><li>• <i>Running</i></li><li>• <i>Success</i></li><li>• <i>Success with warnings</i></li><li>• <i>Error</i></li></ul>

---

**Note.** A partial migration can occur before an error occurs.

---

---

**Note.** The logs are stored and synced on both the source and the target databases, so you can view those logs on either system.

---

### ***Migration Log Results***

Migration log results are stored in the source and the target database. Logging includes full details of running the content migration process, including:

- The user who created the run control.
- The time the run control was created.
- The time the run control was last modified.
- The approver, if one exists.

- The approval date and time.
- The user who initiates the migration.
- The time the migration starts.
- The time the migration ends.
- The migration ID.
- The migration configuration parameters, including all information about the Migrate Content page.
- Content details, including data from the content tables EPPCM\_CONTENT that will be migrated.
- The migration status of each content ID, including:
  - *New*: The content ID does not exist in the target database.
  - *Skip*: The content ID exists in the target database.  
Action of each content ID is either *Skip*, *already exists*, or *Create New ID*.
  - *Create new version*: The content ID exists in the target database, so a new version of the content will be created.
  - *Error*: An error occurred while you were trying to migrate the data.  
If an error occurred, a detailed error message is logged so that the content administrator can take proper actions.
- Source and target nodes.
- Source and target database names.

---

**Note.** The logging details above applies to both the Content Migration - Preview Selection page and the actual results of running a migration.

---

### ***Errors During the Content Migration***

The content migration process cannot proceed if you receive any of these error messages:

- Invalid target folder ID.  
The folder ID does not exist, or the folder cannot store the type of content selected for migration.
- Invalid content selection options.  
The criteria set does not have any content migrated.

### ***Errors for Migration to Fail on Content***

The migration fails on content if you receive any of these error messages:

- SQL error (problem updating tables).

To rectify, verify the database configuration.

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*.

- Integration Broker errors.

To rectify, review the Integration Broker logs and verify the Integration Broker configuration.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker*.

- Application Engine errors.

To rectify, review the Application Engine logs and verify the Application Engine configuration.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Engine*.

## Managing Content Migrations by Status

Access the My Content Migrations Status page (select My Content, My Content Migrations).

My Content Migrations Status		
Review the content items that require your attention. Click the Content Item Status to review content with that status.		
Content Status		
Content Item Status	Text	Total Items
<a href="#">In Process Migration</a>	Items in progress	0
<a href="#">Rejected Migration</a>	Items the administrator rejected for migrating	0
<a href="#">Review as Approver</a>	Items submitted to you to review for approval	1
<a href="#">Submitted Migration</a>	Items you have submitted for approval	1

My Content Migrations Status page

### Content Status

Click a status link to access the My Content Migrations Status page where you can preview the content items for the selected status:

- The *In Process Migration* status consists of new and previewed migrations that were created by the logged-in user.
- The *Rejected Migration* status consists of migrations that are created by the logged-in user and are currently in the rejected state.
- The *Review as Approver* status consists of migrations in *Awaiting Approval* status for which the logged-in user is assigned as approver.
- The *Submitted Migration* status consists of migrations in *Awaiting Approval* status created by the logged-in user.

## Verifying Permissions, Updating Publish Locations, and Reversing a Content Migration

After you run a content migration, Oracle recommends you to:

- Verify permissions of the migrated content.

---

**Note.** The migration does not copy permissions to the target; the migrated content inherits the permissions from the target folder.

---

- Update the publish locations.

To update locations by import, use a project to import updates to a database.

To update locations manually, use the Locations page or the Pagelet Wizard.

See [Chapter 4, "Setting Up and Working With Managed Content," Selecting Content Locations, page 140.](#)

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder from Pagelet Wizard, page 104.](#)

If the content migration completed either successfully or in error, and that content migration must be undone, the Content Migration - Log Viewer page contains all the information required to manually undo, or delete, changes that were made during the migration. You cannot resume the migration process; the migration process must be restarted.

See [Chapter 2, "Setting Up the Content Management System," Reviewing Content Migration Results, page 60.](#)

## Chapter 3

# Accessing Content

This chapter provides an overview of the folder hierarchy and discusses how to:

- Browse folder hierarchies.
- Search for folders and content.
- Browse published categorized content.
- View a content folder in a pagelet.
- Use other methods for accessing folders and content.

---

**Note.** This chapter describes the basic concepts and functionality of browsing and searching. Differences between the Managed Content, Categorized Content, and News Publications features are discussed in more detail in later chapters.

---

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## Understanding the Folder Hierarchy

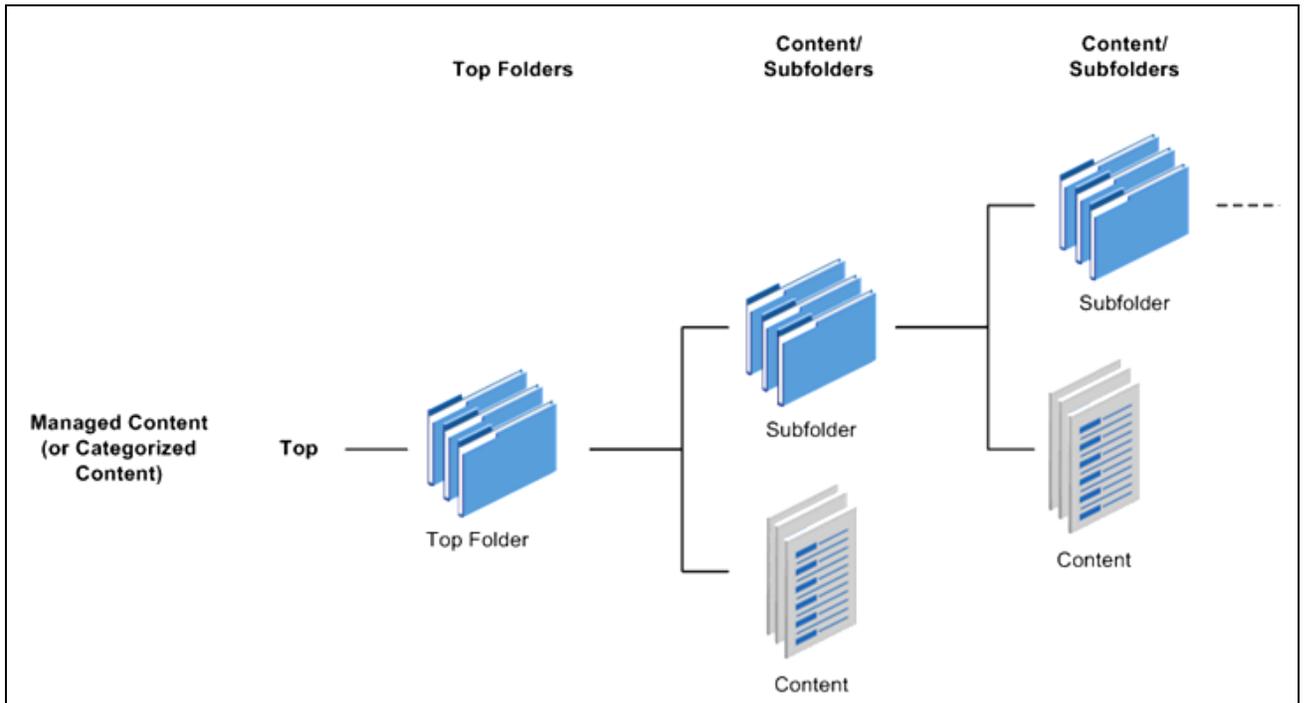
In Oracle's PeopleSoft Enterprise Portal, folders and subfolders are used to organize items in the Content Management system. Each content management feature (Managed Content, Categorized Content, and News Publications) has a folder and subfolder hierarchy that is separate from the other two features. Folders at the root of the hierarchy are known as *top folders*. Each top folder can contain zero or more subfolders; and each subfolder in turn can contain zero or more subfolders, and so on. Content can reside in any folder except at the top (or root) of the folder hierarchy.

In the Content Management system, users can use a number of functions and menu items to access content:

- *Browse Folders (or Browse Publications).*  
Enables users to traverse down and up through the folder hierarchy to access folders and content.
- *Search Folders (or Search Sections).*  
Enables users to search for folders by folder title, folder ID, parent ID, or by last item added.
- *Search Content.*  
Enables users to use the search index to search for content using keywords.
- *Maintain Content.*  
Enables users to search for content by content title, content ID, content type, parent ID, date added, and inactive date.

Outside of the Content Management system, you can also browse published categorized content from the Browse by Category page.

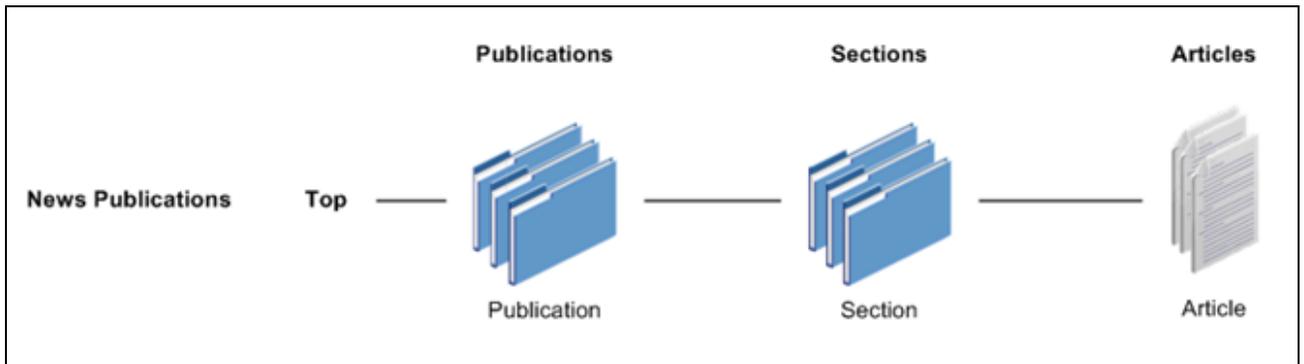
This diagram illustrates these Managed Content (or Categorized Content) hierarchical relationships:



Managed Content (or Categorized Content) hierarchy

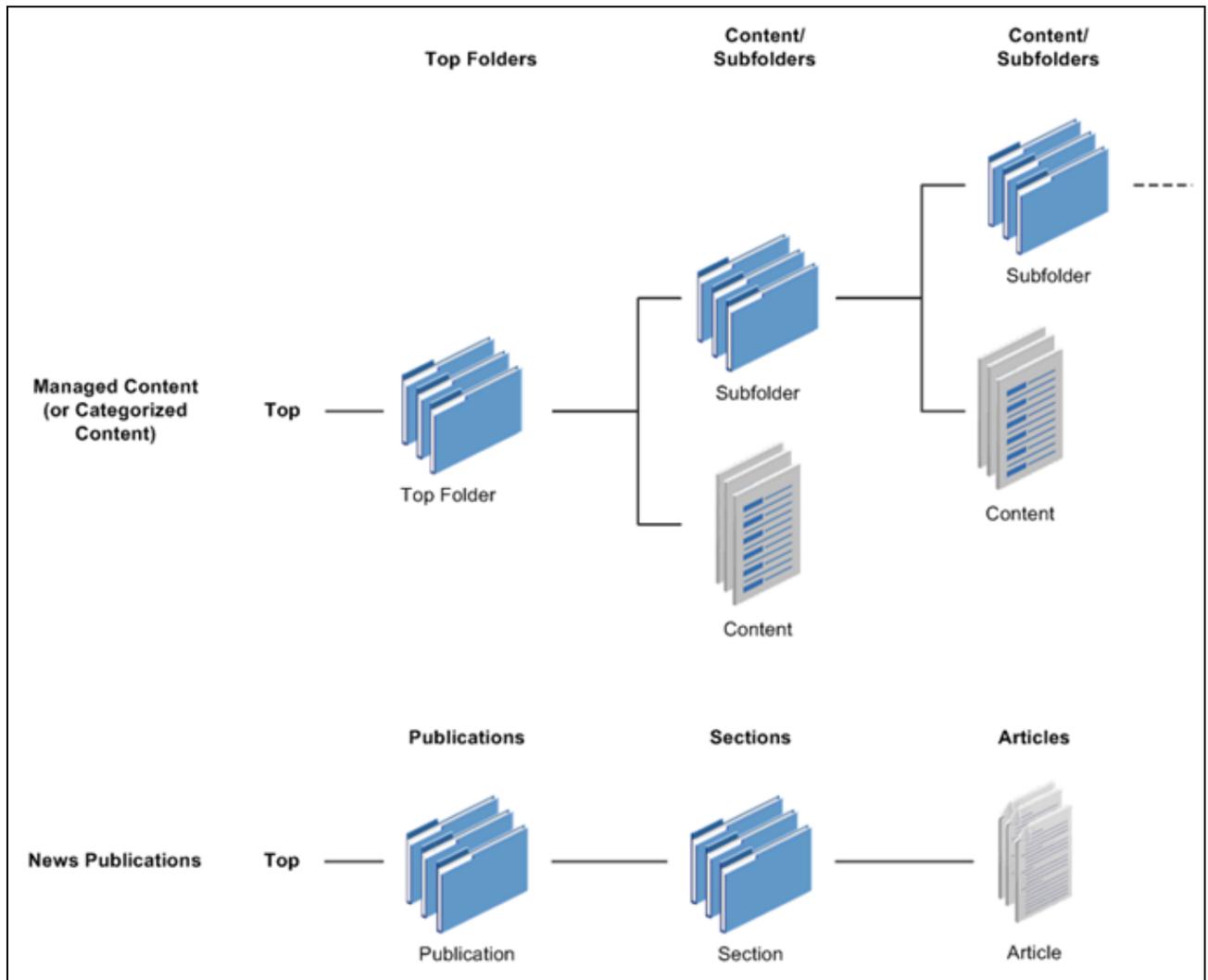
In the News Publications feature, the terminology and hierarchy are slightly different, but the concepts and access mechanisms are the same. In the News Publications feature, top folders are known as *publications*. In the News Publications feature, only one level of subfolders is allowed, and these subfolders are known as *sections*. Each piece of content within a news publication is called an *article*, and articles can only reside within sections, not in publications.

The diagram illustrates the News Publication hierarchical relationships:



News Publications hierarchy

In summary, each Content Management feature (Managed Content, Categorized Content, and News Publications) has a folder and subfolder hierarchy that is separate from the other two features, as illustrated in this diagram:



Folder and subfolder hierarchy of Content Management feature

## Browsing Folder Hierarchies

This section provides an overview of folder hierarchy rules and discusses how to:

- Use top-level browse pages.
- Browse sub-level Managed Content or Categorized Content folders.

---

**Note.** Defining folder properties and setting up their privilege security is not discussed in this chapter because too many variations exist between features.

---

## Folder Hierarchy Rules

Folder hierarchies and content within Content Management undergo frequent changes. Content is constantly being created, updated, published, relocated, and deleted. Content Management reflects these changes as they occur.

The Browse Folder or Browse Publications menu items are used to start browsing at the top of each content management hierarchy. From there, depending on the feature being browsed, the Browse Managed Content, Browse Categorized Content, Browse News Publication, or Browse Publication Sections page is used to continue browsing through the content hierarchy.

The following rules apply to all Content Management features:

- A portal name of the child folder must match the portal name of the parent folder.
- A feature type of the child folder must match the feature type of the parent folder.
- A folder can have only one parent.
- A folder with itself as the parent is a *Top Folder*.
- Content can have multiple parent folders.
- Content has a single origin feature type.
- Managed Content folders can contain only Managed Content type content.
- All non-Managed Content folders can contain only their own feature type content or Managed Content type content.
- Content originating from a feature type that is different from the one it is being accessed from can only be viewed unless it has been shared to the Managed Content type.

## Pages Used to Browse Folder Hierarchies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Content	EPPCM_HIERTOP_MAIN	<ul style="list-style-type: none"> <li>• Content Management, Managed Content, Browse Folders</li> <li>• Content Management, Categorized Content, Browse Folders</li> <li>• Content Management, News Publications, Browse Publications</li> </ul>	Add a top-level folder if you are a top administrator for this feature or, starting at the top level folders, drill down through folder hierarchies for content that is accessible by that feature.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Browse Managed Content Browse Categorized Content Browse Publication Sections	EPPCM_HIER_MAIN	<ul style="list-style-type: none"> <li>Content Management, Managed Content, Browse Folders  Click a folder title link on the Browse Managed Content page.</li> <li>Content Management, Categorized Content, Browse Folders  Click a folder title link on the Browse Categorized Content page.</li> <li>Content Management, News Publications, Browse Publications  Click a section title link on the Browse News Publications page.</li> </ul>	For Managed Content and Categorized Content, drill down through the folders containing managed content or categorized content.  For News Publications, access the Browse Section Articles page.
Browse Section Articles	EPPCM_HIERNWS_MAIN	Content Management, News Publications, Browse Publications  Click a section that has no children on the Browse Publication Sections page.	Displays basic information about the articles within a single section of a news publication and provides access to article details.  You can add, edit, delete, or view articles depending upon article status and member privileges for the section.

## Using Top-Level Browse Pages

Access the Browse Managed Content page (select Content Management, Managed Content, Browse Folders).

**Browse Managed Content** Feed ▾

Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder details.

Top						
ID	Title	Modified	Modified By	Properties	Delete	
1002	<a href="#">Corporate Communications (3)</a>	01/27/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
1272	<a href="#">Facilities Site Content (8)</a>	01/18/03	SAMPLE	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
980	<a href="#">Internal Controls Enforcer (1)</a>	03/10/04	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
1501	<a href="#">Investor Portal Solution (3)</a>	02/10/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
2088	<a href="#">MIGR 1 (2)</a>	★ 02/13/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
1273	<a href="#">Public Statements (2)</a>	★ 01/18/03	SAMPLE	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
10	<a href="#">Shared Content (3)</a>	★	PPLSOFT	<a href="#">Properties</a>		
2083	<a href="#">test (0)</a>	★ 02/11/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	

Example of a top-level Browse Managed Content page

Alternatively, access the Browse News Publications page (select Content Management, News Publications, Browse Publications).

**Browse News Publications** Feed ▾

Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder details.

News Publications						
ID	Title	Modified	Modified By	Properties	Delete	
1031	<a href="#">Company News (5)</a>	★ 02/10/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
950	<a href="#">Investor News (3)</a>	★ 02/17/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
953	<a href="#">Investor Portal Promotions (1)</a>	12/02/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
955	<a href="#">SEC Filings (1)</a>	12/11/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
2097	<a href="#">test (1)</a>	★ 02/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	
2099	<a href="#">test2 (1)</a>	★ 02/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>	

Browse News Publications page

**Feed**

Click to open the feed for this item, if available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts."

**Add Top Folder**

Click to create new folder hierarchies or publications.

<b>Search Content</b>	Click to access the Maintain Content page to access and maintain the properties for the content that you have privileges to view.  See <a href="#">Chapter 3, "Accessing Content," Using Other Methods for Accessing Folders and Content, page 79.</a>
<b>Title</b>	Click to drill down through the folder hierarchy.  The bracketed number indicates the number of folders and documents that are located at the next level. This number does not distinguish between folders and documents.
	Indicates folder that contains recently added contents.
<b>Modified</b>	Displays the date when the content folder was last modified.
<b>Modified By</b>	Displays the user ID who last modified the content folder.
<b>Properties</b>	Click to go to the Folder Properties page to view or edit property details and security for this folder hierarchy.
<b>Delete</b>	Click to delete the associated folder. <hr/> <b>Note.</b> Deleting a folder is allowed only if the folder does not contain any published content. Deleting the folder will cascade the deletion to all of the folder's sub-folders and child content.  <hr/> The <i>Shared Content</i> folder is a system folder and cannot be deleted. <hr/>

## Browsing Sub-Level Managed Content or Categorized Content Folders

Access a sublevel Browse Managed Content page (select Content Management, Managed Content, Browse Folders and click a folder title link).

**Browse Managed Content** Feed ▾

Click the folder title to navigate through the folder levels. Click 'Properties' to access the folder or content details. Click the content title to preview the content.

[Properties](#) [Search Content](#)

Filter By:

[Top](#) > [Corporate Communications](#)

Content intended for Corporate Communications

Corporate Communications								Customize   Find   View All     First 1-5 of 5 Last	
ID	Title	Status	Version	Modified	Modified By	Properties	Delete		
2028	<a href="#">ABC (0)</a> ★			07/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
2030	<a href="#">Content Management - subfolder (0)</a> ★			07/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1012	<a href="#">Partners (5)</a>			12/12/04	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1008	<a href="#">Products (4)</a>			12/12/04	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1049	<a href="#">Documentation Tips</a> Draft 4		4	07/12/09	VP1	<a href="#">Properties</a>			

Example of a sublevel Browse Managed Content page

Alternatively, access the sublevel Browse News Publications page (select Content Management, News Publications, Browse Publications and click a folder title link).

**Browse Publication Sections** Feed ▾

Click the folder title to navigate through the folder levels. Click 'Properties' to access the folder or content details. Click the content title to preview the content.

[Properties](#) [Search Content](#)

[News Publications](#) > [Company News](#)

Internal Newsletter

Company News						Customize   Find   View All     First 1-5 of 5 Last	
ID	Title	Modified	Modified By	Properties	Delete		
1039	<a href="#">Events (8)</a> ★	02/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1033	<a href="#">Headline News (15)</a>	12/12/01	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1034	<a href="#">Human Resources News (7)</a> ★	02/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1035	<a href="#">Information Technology News (5)</a> ★	02/16/09	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>		
1040	<a href="#">Submitted Articles (0)</a>	12/12/01	VP1	<a href="#">Properties</a>			

Example of the Browse Publication Sections page

Sublevel Browse Managed Content and Browse Categorized Content pages display basic information about the folders and the content within a folder. Within a top folder or a subfolder, you can add a subfolder, add content, or navigate deeper into the folder hierarchy. Beneath the root folder (Top), locator links enable you to traverse back up the folder hierarchy. A description of the content appears below the locator links. This description can include HTML that is entered in the summary on the Folder Properties page.

This page provides drill-down access to subfolders as well as a navigation path to return to the top level. Depending on member privileges for the folder, you can add, edit, delete, or view subfolders and content.

---

**Note.** Managed Content and Categorized Content hierarchies may contain many subfolder levels.

---

Depending on the feature, Content Management enables you to add different types of content, such as file attachments, web URLs, text, HTML, and image attachments. Based on the type of content that you select, you have a choice of format; for instance, the format for a file attachment can be Microsoft Word or Adobe Acrobat. The image to the left of the title identifies the format that is used for each content item.

<b>Feed</b>	Click to open the feed for this item, if available.  See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Feeds and Alerts."</i>
<b>Add Folder</b>	Click to access the Folder Properties page to add a new subfolder.
<b>Add Section</b>	Click to access the Browse Managed Content - Add Content page, where you can specify the type of content you want to add to a folder in managed content.
<b>Add Content</b>	Click to access the Folder Properties page, where you can define the folder properties and details for child content. <hr/> <b>Note.</b> Child content created from this folder uses the specified child default values. <hr/>
<b>Properties</b>	Click to access the Folder Properties page to view or edit property details and security for this folder hierarchy.
<b>Search Content</b>	Click to access the Maintain Content page to access and maintain the properties for the content that you have privileges to view.  See <u>Chapter 3, "Accessing Content," Using Other Methods for Accessing Folders and Content, page 79.</u>

### ***Corporate Communications***

<b>ID</b>	Displays the content IDs that exist in the selected content folder.
<b>Title</b>	Click the content title link to view the content details.
<b>Modified</b>	Displays the date when the content was last modified.
<b>Modified By</b>	Displays the user ID who last modified the content.
<b>Properties</b>	Click to access the content properties page to view or edit property details for this content.
<b>Delete</b>	Click to delete the associated content.

## Searching for Folders and Content

This section provides an overview of search functions and menus and discusses how to:

- Search for a folder.
- Search for content.

## Understanding Search Functions and Menus

In the content management system, users can use a number of functions and menu items to search for folders and content:

- *Search Folders (or Search Sections)*  
Enables users to search for folders by folder title, folder ID, parent ID, or by last item added.
- *Search Content*  
Enables users to use the search index to search for content using keywords.
- *Maintain Content*  
Enables users to search for content by content title, content ID, content type, parent ID, date added, and inactive date.

## Pages Used to Search for Folders and Content

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Search Folders	EPPCM_HIERARCHY	Content Management, Managed Content, Search Folders	Used to locate a folder in the content management system. This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.
Search Content	EPPCM_SRCH_MAIN	Content Management, Managed Content, Search Folders  Click a folder title link on the Search Folder page.  Click the Search Content link on the Browse Managed Content page.	Search for content within the entire content management system or within a selected content management feature or features.

## Searching for a Folder

Access the Search Folders page (select Content Management, Managed Content, Search Folders).

### Search Folders

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Maximum number of rows to return (up to 300):

**Search by:**  begins with

[Advanced Search](#)

### Search Results

[View All](#) First  1-100 of 140  [Last](#)

<a href="#">Folder Title</a>	<a href="#">Feature</a>	<a href="#">Folder ID</a>	<a href="#">Parent Title</a>	<a href="#">Parent ID</a>	<a href="#">Site Name</a>	<a href="#">Last Item Added</a>
<a href="#">Shared Content</a>	Managed	10	Shared Content	10	EMPLOYEE	02/09/2009
<a href="#">Internal Controls Enforcer</a>	Managed	980	Internal Controls Enforcer	980	EMPLOYEE	(blank)
<a href="#">Corporate Communications</a>	Managed	1002	Corporate Communications	1002	EMPLOYEE	12/12/2004
<a href="#">Products</a>	Managed	1008	Corporate Communications	1002	EMPLOYEE	12/12/2004
<a href="#">Partners</a>	Managed	1012	Corporate Communications	1002	EMPLOYEE	12/12/2004
<a href="#">Portal</a>	Managed	1016	Products	1008	EMPLOYEE	12/12/2004
<a href="#">Technology</a>	Managed	1022	Portal	1016	EMPLOYEE	12/12/2004
<a href="#">HRMS</a>	Managed	1024	Products	1008	EMPLOYEE	(blank)
<a href="#">Facilities Site Content</a>	Managed	1272	Facilities Site Content	1272	EMPLOYEE	01/16/2003
<a href="#">Public Statements</a>	Managed	1273	Public Statements	1273	EMPLOYEE	02/09/2009
<a href="#">Investor Portal Solution</a>	Managed	1501	Investor Portal Solution	1501	EMPLOYEE	12/10/2002
<a href="#">Policies &amp; Procedures</a>	Managed	1502	Investor Portal Solution	1501	EMPLOYEE	(blank)
<a href="#">SEC Filings</a>	Managed	1503	Investor Portal Solution	1501	EMPLOYEE	(blank)
<a href="#">Public Disclosures &amp; Communications</a>	Managed	1504	Investor Portal Solution	1501	EMPLOYEE	(blank)

Search Folders page

Use the Search Folders page to locate a folder in the content management system. This search is restricted to the current content management feature. You can select to search by folder title, folder ID, last item added, or parent ID.

## Searching for Content

Access the Search Content page (select Content Management, Managed Content, Search Folders; click a folder title link on the Search Folder page; and click the Search Content link on the Browse Managed Content page).

### Search Content

Enter search keywords, using quotes for any phrases. Click [Search Tips](#) for more details. Select 'Current Folder' to retrieve content within the current folder's hierarchy. Select 'Current Site' to retrieve content within the current site.

Search Text:  [Search Tips](#)

---

Search In:  Current Folder  Current Site  All Folders and Sites

---

Feature:  Categorized Content  
 News Publications  
 Managed Content

[Hide Summaries](#)

**Search Results** [Find](#) | [View All](#) [First](#) 1-2 of 2 [Last](#)

1	<a href="#">Human Resources Management</a>	Human Resources Management introduction Content ID: 1041 Source: Marketing Tags: No Tags Available	Rating:
2	<a href="#">HRMS Customer Success Stories</a>	See the customer success stories for HRMS. Content ID: 1042 Source: Marketing Tags: No Tags Available	Rating:

[Return to Browse Managed Content](#)

Search Content page

Use the Search Content page to search for content within the entire content management system or within a selected content management feature. Content search uses the Verity engine.

See [Chapter 8, "Using the Advanced Options," Searching for Content, page 273.](#)

---

## Browsing Published Categorized Content

This section discusses how to browse by category.

Access the Browse by Category page (EPPCM\_BRWS\_MAIN) (select My Content, Browse by Category from the main menu; click a title link).

## Browse by Category Feed ▼

[Edit Folder](#)

[Top](#) > [PeopleSoft Documents](#)

Sample documents from various portions of PeopleSoft.com (including some from Customer Connection, whose access will be restricted to just employees & customers)

PeopleSoft Documents			Customize   Find   View All	First  1-6 of 6  Last
	Title	Source	Modified	Summary
	<a href="#">About PeopleSoft (3)</a>		02/08/02	Note that the Content Source has been autoexpanded, so that all subcategories are automatically created and content inserted. The viewer roles are set to all/most users.
	<a href="#">Portal Implementation (6)</a>		02/08/02	Note that the Content Sources are NOT autoexpanded, so that subcategories can have content manually added. Also note the viewer roles are restricted from the parent category to just customers and employees.
	<a href="#">Products (3)</a>		02/08/02	Note that the Content Source has been autoexpanded, so that all subcategories are automatically created and content inserted. The viewer roles are set to all/most users.
	<a href="#">Support (3)</a>		02/08/02	Note that the Content Source has been autoexpanded, so that all subcategories are automatically created and content inserted. The viewer roles are set to all/most users.
	<a href="#">PeopleSoft.com</a>	Enterprise Navigation	02/08/02	PeopleSoft.com
	<a href="#">PeopleStore</a>	Enterprise Navigation	02/08/02	PeopleStore

### Browse by Category page

Use this page to browse and view published categorized content outside of the Content Management system. The system displays published content to users with viewer roles for the parent folder where the content is located. The system does not display unpublished categorized content.

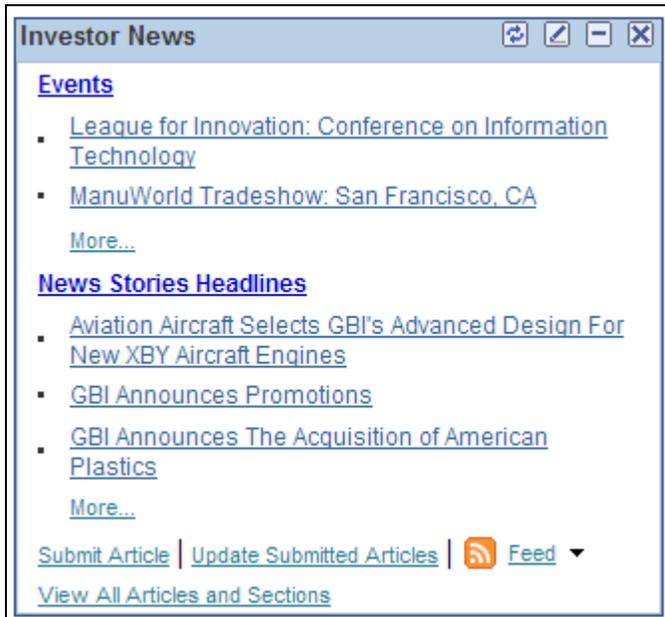
Click the folder item title to drill down through the hierarchy. Use the navigation path to navigate to the parent folders. Click the title of the content item to view the content.

---

## Viewing a Content Folder in a Pagelet

This section discusses how to view a content folder in a pagelet.

Access the Investor News pagelet (click the Content link from the menu bar on the homepage and then select any news publication option in the Personalize Content page).



Investor News pagelet

- <News title links>** Click to access the News Publication Details page, where you can view the details of each news.
- Submit Article** Click to access the Add News Articles page, where you can specify the type of content you want to add to a folder in managed content.  
See Chapter 7, "Setting Up and Working With News Publications," Submitting News Articles, page 258.
- Update Submitted Articles** Click to access the Submit News Articles page, where you can view basic information about the articles within a section and drill down to article details. Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles.  
See Chapter 7, "Setting Up and Working With News Publications," Submitting News Articles, page 258.
- Feed** Click to open the feed for this publication, if available.  
See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Feeds and Alerts."*
- View All Articles and Sections** Click to access the View All Articles and Sections page where you can view all active articles and sections of the selected news publication pagelet.  
See Chapter 7, "Setting Up and Working With News Publications," Viewing All Articles and Sections, page 257.

---

## Using Other Methods for Accessing Folders and Content

This section discusses how to access folders and content using methods other than the methods already discussed.

You can access folders and content within hierarchies through the standard portal search using the Search Folders and Maintain Content functions. These functions are common to the Content Management features. The user sees only content for which he or she has viewer rights, regardless of expiration dates, which enables a user to search through existing content.

These are the types of left navigation links used to access folders and content:

- *Search Folders:* Search for Content Management folders that you have privileges to view, and access the children that are associated with the selected folders.
- *Maintain Content:* Access and maintain the properties for the Content Management content that you have privileges to view.
- *Search All Folders:* Search for a folder in all features and sites that you have privileges to view.

Access the children that are associated with the selected folder.

- *Maintain All Folders:* Search for a folder in all features and sites that you have privileges to view.

Maintain the properties for the selected folders.

- *Maintain All Content:* Search for content in all features and sites that you have privileges to view.

Maintain the properties for the content that is stored in the Content Management system.

- *Search Content:* Use Verity to search for content you have privileges to view.

Search results link to the first context properties page within the first found location. Content results are listed only once.

---

**Note.** The same content item may be listed multiple times because a single content item can be shared across multiple hierarchies, features, and sites.

---



## Chapter 4

# Setting Up and Working With Managed Content

This chapter provides an overview of the Managed Content feature and discusses how to:

- Manage folders.
- Add new managed content.
- Manage content versions.
- Work with the My Managed Content pagelet.
- Import managed content into other features.

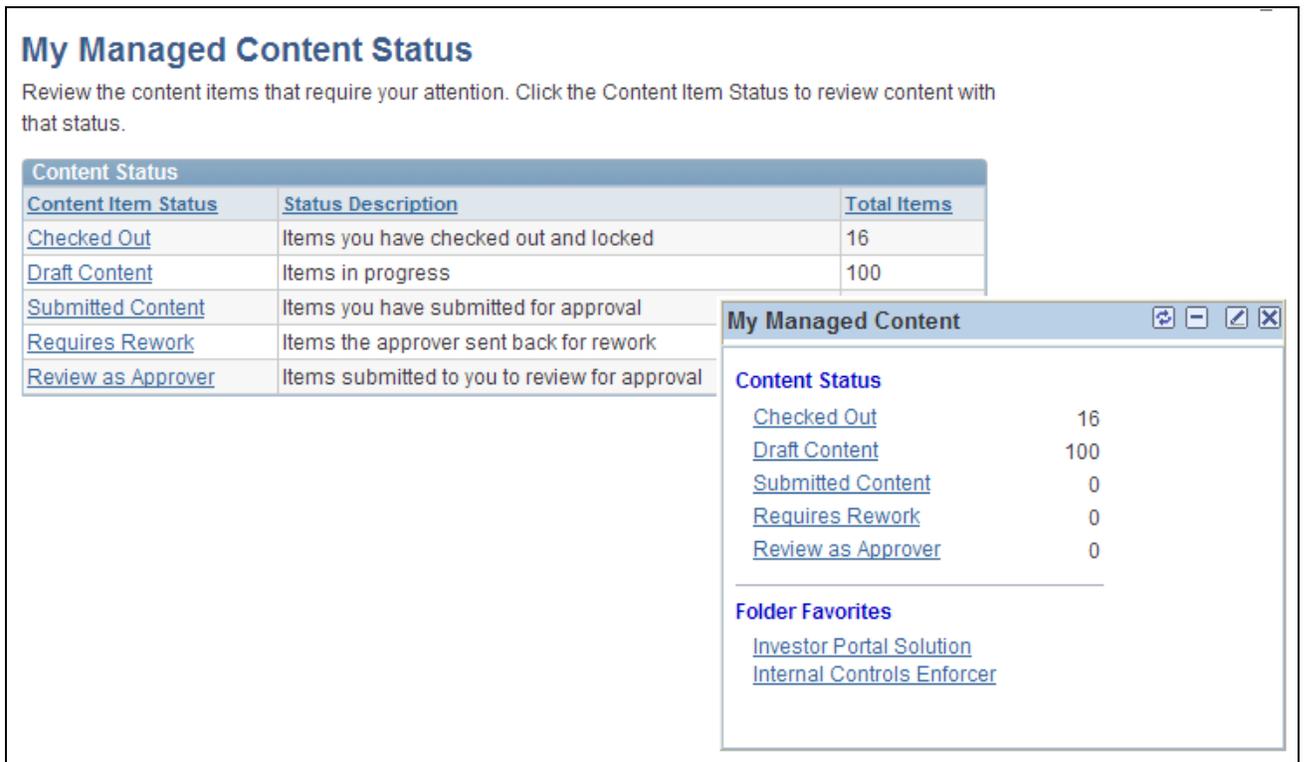
---

## Understanding Managed Content

In Oracle's PeopleSoft Enterprise Portal, the Managed Content feature of the Content Management system enables you to manage the development of content. Managed content serves as a proving ground for new content that is to be used in the portal. The system assigns a status to each piece of content based on where the content is in the process flow and what action the user performs.

The Managed Content feature enables you to create content, manage it collaboratively in folders, check content in and out, create new versions of content, and make approved content available to other content management features, such as news publications, content categorization, collaborative workspaces, related information pagelets, and others.

This example shows the My Managed Content Status page (My Content, My Migrate Content) plus an inset of the My Managed Content pagelet listing the number of content items that require your attention by status:



My Managed Content Status page and an inset of the My Managed Content pagelet

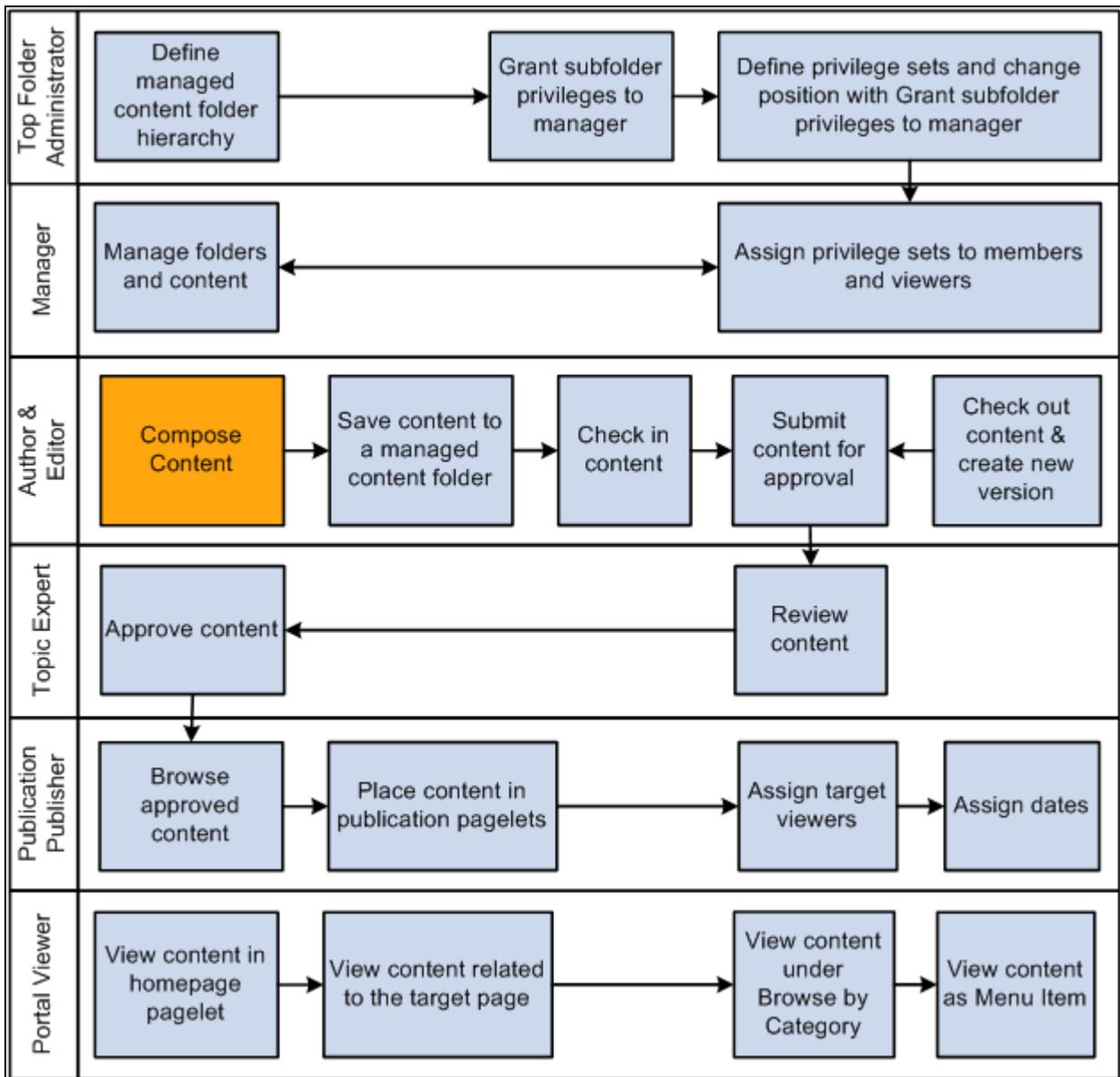
**Process of Creating Managed Content**

The Managed Content feature offers a proving ground for new content that is to be used in the portal.

This feature enables you to create content, manage it collaboratively in folders, check content in and out, create new versions of content, and make approved content available to other content management features, such as News Publications, Content Categorization, and more.

The system assigns a status to each piece of content based on where content is in the process flow and what action the user performs.

This flowchart illustrates the Content Management Managed Content process and the roles involved in each step:



Managed Content process

### Checking Content In and Out

When you add new content to a Managed Content folder, it is automatically locked and checked out to you. Checking in content releases the lock so that other authorized folder members can check out and edit the content. Each time the content is checked out, it creates a new version. The system assigns new versions a status of *Draft*, while old versions maintain their previous status. Members can access previous versions, but the current checked out version is locked and only accessible to the user who checked out the content.

---

**Note.** New versions are based on whichever old version was checked out. If four versions exist and you check out the latest version, version five will be based on version four. However, if you check out version two, version five will be based on that version. The current version is always indicated on the Content Properties page.

If content is being translated into one or more languages, perform the language translations on the content after the content is checked out. When all translations are completed, you can check content in.

---

See [Chapter 5, "Setting Up and Working with Categorized Content," Translating Content Management HTML/Text Content, page 169.](#)

### **Canceling Check Out**

Content that is checked out is locked to a given user. Canceling the check out causes different behaviors depending on the status of the last version of the content that is checked out:

- If only one version exists, canceling the check out unlocks the content.
- If the checked out version is submitted for approval, canceling the check out unlocks the content and sets the version status back to *Draft*.
- If the checked out version is at draft status and more than one version exists, canceling the check out deletes the last version.

### **Submitting Content for Approval**

After the content is completed, the author or reviewer submits it for approval. The system assigns the submitted content a status of *Pending Approval* and automatically checks it out to the approver. The current version becomes locked and accessible only to the approver.

The approver can either approve the content or return it to the submitter for rework.

When the content is approved, the system assigns the content a status of *Approved*. This content can be selected by a publication if it is in a folder that allows content to be published. Users can still check out and edit the content. This check-out creates a new version, leaving the approved version intact and usable by publishing features if it is in a publishable folder.

If content is returned for rework, the system assigns the status *Requires Rework* and unlocks it.

---

## **Managing Folders**

This section discusses how to:

- Maintain folder properties for managed content.
- Update folder security.
- Assign member privileges.
- Move folders in Managed Content.
- Publish a folder as a menu item.

- Publish a folder as a feed.

## Pages Used to Manage Folders

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Folder Properties	EPPCM_CATG_MAIN	<ul style="list-style-type: none"> <li>• Content Management, Managed Content, Browse Folders</li> </ul> <p>Click the Properties link on the Browse Managed Content page.</p> <ul style="list-style-type: none"> <li>• Navigate through the hierarchy to the desired level. Click the Add Folder button on the Browse Managed Content page.</li> <li>• Navigate through the hierarchy. Click the appropriate Properties link on the Browse Managed Content page.</li> </ul>	<p>Used to set the properties for a new folder or to update property details for an existing folder.</p> <p><b>Note.</b> Used for top folders as well as for subfolders.</p>
Folder Security	EPPCM_CATG_MEM	<p>Content Management, Managed Content, Browse Folders</p> <p>Click the Properties link on the Browse Managed Content page.</p> <p>Select the Folder Security tab on the Folder Properties page.</p>	<p>Used to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.</p>
Folder Security - Set Members Privileges	EPPCM_CATG_PRIV	<p>Content Management, Managed Content, Browse Folders</p> <p>Click the Properties link on the Browse Managed Content page.</p> <p>Select the Folder Security tab. Click the Add Member or the Edit button.</p>	<p>Assign privilege sets to the selected members.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Folder Properties - Move Folder	EPPCM_CATG_TREEMOD	Content Management, Managed Content, Browse Folders  Click the Add Top Folder button, and click the Move Folder link on the Folder Properties page.	Used to change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature.  <b>Note.</b> This option is only available for Managed Content, Categorized Content, and Workspaces.
Folder Properties - Publish as Menu Item	EPPCM_CATG_CREF	Content Management, Managed Content, Browse Folders  Click the Add Top Folder button on the Browse Managed Content page.  Click the Publish as Menu Item link on the Folder Properties page.	Publish a folder in the Content Management system so that it is accessible as a link in the left navigation menu.
Folder Properties - Advanced Feed Options	EPPCM_FEED_ADVOPT	Content Management, Managed Content, Browse Folders  Click the Add Top Folder button, and click the Publish as Feed link.  Click the Edit or Add Feed button.  Click the Advanced Option link.	Set up advanced options to publish a folder in the content management system so that it is accessible as a feed.  <b>Note.</b> The Publish as Feed link is available on all folder properties pages if the folder can be published and you have permissions to publish the folder.

## Maintaining Folder Properties for Managed Content

Access the Folder Properties page (select Content Management, Managed Content, Browse Folders and click an appropriate Properties link on the Browse Managed Content page).

Folder Properties
Folder Security

Define the folder properties and details of the Top Folder. Child content created from this folder uses the specified child default values.  
[Top](#) > [Public Statements](#)

\*Title:

Summary:

Owner:  [SAMPLE](#)

Content can be Published  
 Folder can be Published  
 Do Not Allow Deletes

Folder ID: 1273      Feature: Managed Content  
Modified: 01/18/2003 12:27AM      Modified By: [SAMPLE](#)

Child Content Defaults

\*File Storage:  Documents in Database

\*Approvals:   Cascade Approval Default to Child Folders on Save

\*Inactive Date:

[Return to Browse Managed Content](#)     
[Publish as Pagelet](#)   
[Publish as Menu Item](#)   
[Publish as Feed](#)   
[Move Folder](#)

### Folder Properties page

Users can add folders or update properties at any level for which they have authorization. Only top administrators can create or update top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders or update properties.

**Title**      Enter the desired information into the Title field.

**Summary**      Add a brief description of the content.  
This field supports HTML entries.

**Owner**      Assign the owner of the folder.  
Click the name link of owner to access the Instant Message page, where you can send a instant message to the owner.

<b>Content can be Published</b>	<p>Select this option to enable approved content to be imported and published in features outside of managed content.</p> <p>You must select this option for publishing features to import or reference managed content.</p> <hr/> <p><b>Note.</b> If you want approved content to remain private, you can create a development or work-in-progress folder that is nonpublishable. As content is completed and approved, you can then add a new publishable folder location for the content. The development folder should have only publishing and viewing members.</p> <hr/> <p>See <a href="#">Chapter 4, "Setting Up and Working With Managed Content," Selecting Content Locations, page 140.</a></p>
<b>Folder can be Published</b>	<p>Select this check box to allow for publishing of this folder as a pagelet or menu item.</p> <hr/> <p><b>Note.</b> Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the Publish as Pagelet, Publish as Feed, and Publish as Menu Item links.</p> <hr/>
<b>Do Not Allow Deletes</b>	<p>Select this option to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.</p>
<b>Folder ID</b>	<p>Displays the ID of the folder.</p>
<b>Feature</b>	<p>Displays the features to which the folder belongs.</p>
<b>Modified</b>	<p>Displays the date when the folder was last modified.</p>
<b>Modified By</b>	<p>Displays the user ID who last modified the folder.</p>
<b>Return to Browse Managed Content</b>	<p>After you have completed creating a top folder in the managed content feature, click this link to return to the Browse Managed Content page.</p> <p>The folder that you created now appears as a top folder in the managed content feature.</p>
<b>Publish as Pagelet</b>	<p>Click this link to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet.</p> <hr/> <p><b>Note.</b> This link is available only when the Folder can be Published option is selected.</p> <hr/> <p>See <a href="#">Chapter 4, "Setting Up and Working With Managed Content," Publishing a Pagelet from a Folder, page 101.</a></p>

**Publish as Menu Item** Click this link to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it is accessible as a link in the left navigation menu.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Menu Item, page 95.](#)

**Publish as Feed** Click this link to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Feed, page 96.](#)

**Move Folder** Click this link to access the Top Folder Properties - Move Folder page, where you can change the location of this folder.

See [Chapter 4, "Setting Up and Working With Managed Content," Moving Folders in Managed Content, page 94.](#)

### ***Child Content Defaults***

Child content created from this folder uses the default values specified here.

**File Storage** Select the document storage location for the folder's child content. The value appears by default from entries set up for attachment locations.

As delivered, two locations are set up: one for storage of attachments in a database table; and another as a file server placeholder. The file server choice will not function properly until you edit the URL entry with your server information. The database storage choice functions for the underlying database table that exists within the PeopleSoft Enterprise Portal.

See [Chapter 2, "Setting Up the Content Management System," Defining Document Storage Locations, page 21.](#)

**Approvals**

The Approvals field determines the approval mode for the folder:

- *Requires Approval:* All content in the folder must be approved.
- *Auto-Approved:* The system automatically marks content as approved.
- *Optional Approval:* As content is being created, content authors have the option to require approval or to have the content automatically approved.

---

**Note.** This setting cannot be changed after content has been created. If you need to change the approval setting, you must delete the content and add it back in with the new approval setting.

---

**Cascade Approval Default to Child Folders on Save**

Select to set the default approvals for all new content in child folders.

The approval settings are transferred to all child folders when you save the page. This setting does not affect existing child content approval settings.

**Inactivate Date**

Select the default inactivation date for content created in this folder.

Content with an archive date previous to the current date does not show in the content list in the Browse Content or My Content pages. However, the content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. Publishing features such as News Publication and Categorized Content use the expiration date to control when the content no longer appears.

Available options are:

- *Current Date.*
- *Current Date + 1 Week.*
- *Current Date + 30 Days.*
- *Current Date + 90 Days.*
- *Current Date + 365 Days.*
- *Current Date + 999 Days.*
- *Never Archive.*

**Updating Folder Security**

Access the Folder Security page (select Content Management, Managed Content, Browse Folders; click the Add Top Folder button; and select the Folder Security tab on the Folder Properties page).

Folder Properties | **Folder Security**

Specify the Members, Privileges and Viewers. A Privilege specifies the actions a user can perform upon the folder and the content located in that folder.

[Top](#) > [Corporate Communications](#) > [Partners](#)

Member Type	Member Name	Privilege Sets		
Role	PAPP_CONTENT_ADMIN	Administrator, Expert	Edit	Delete
Role	PAPP_CUSTOMER	Viewer	Edit	Delete
Role	PAPP_PUBLISHER	Viewer	Edit	Delete

[Add Member](#)   [Inherit Members](#)

[Save](#)

[Return to Browse Managed Content](#)

### Folder Security page

Use this page to manage the folder members and their privileges. This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.

A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an Inherit Members button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

---

**Note.** A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member in a folder. Privileges specify the actions a member can perform upon the folder and the content located in that folder.

---

<b>Member Type</b>	Displays the membership type of <i>User</i> or <i>Role</i> for each member.
<b>Member Name</b>	Displays a membership name for each member.
<b>Privilege Set</b>	Displays the privilege set of each member.
<b>Edit</b>	Click to edit the privileges of this member.
<b>Delete</b>	Click to remove the member and prohibit them from accessing content from this folder.
<b>Add Member</b>	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform upon the folder and the content located in that folder.

**Inherit Members**

Click to inherit the members assigned to the parent folder.

---

**Note.** This button will not available if this folder is a top folder.

---

## Assigning Member Privileges

Access the Folder Security - Set Members Privileges page (select Content Management, Managed Content, Browse Folders; click the Add Top Folder button; select the Folder Security tab, and click the Add Member or the Edit button on the Folder Security page).

### Folder Security

## Set Members Privileges

Select members and their privilege security.

**Members**

\*Member Type                      \*Member Name

Role [v]

Member Privileges	
Privilege Set	Privileges
<input type="checkbox"/> Administrator	Add Folder Edit Folder Delete Folder Publish Folder Unpublish Folder Assign Members Add Content Edit Content Edit Content Metadata Delete Content Delete Approved Content Approve Content Publish Content Release Locked Content View Content Discussions Add Content Discussions Moderate Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/> Author	Add Content View Content Discussions Add Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/> Expert	Edit Content Edit Content Metadata Delete Content Delete Approved Content Approve Content View Content Discussions Add Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/> Viewer	View Content Discussions Subscribe to Content View Content and Folder

Folder Security - Set Members Privileges page

**Member Type**                      Select a membership type of *User* or *Role*, and then select the member.

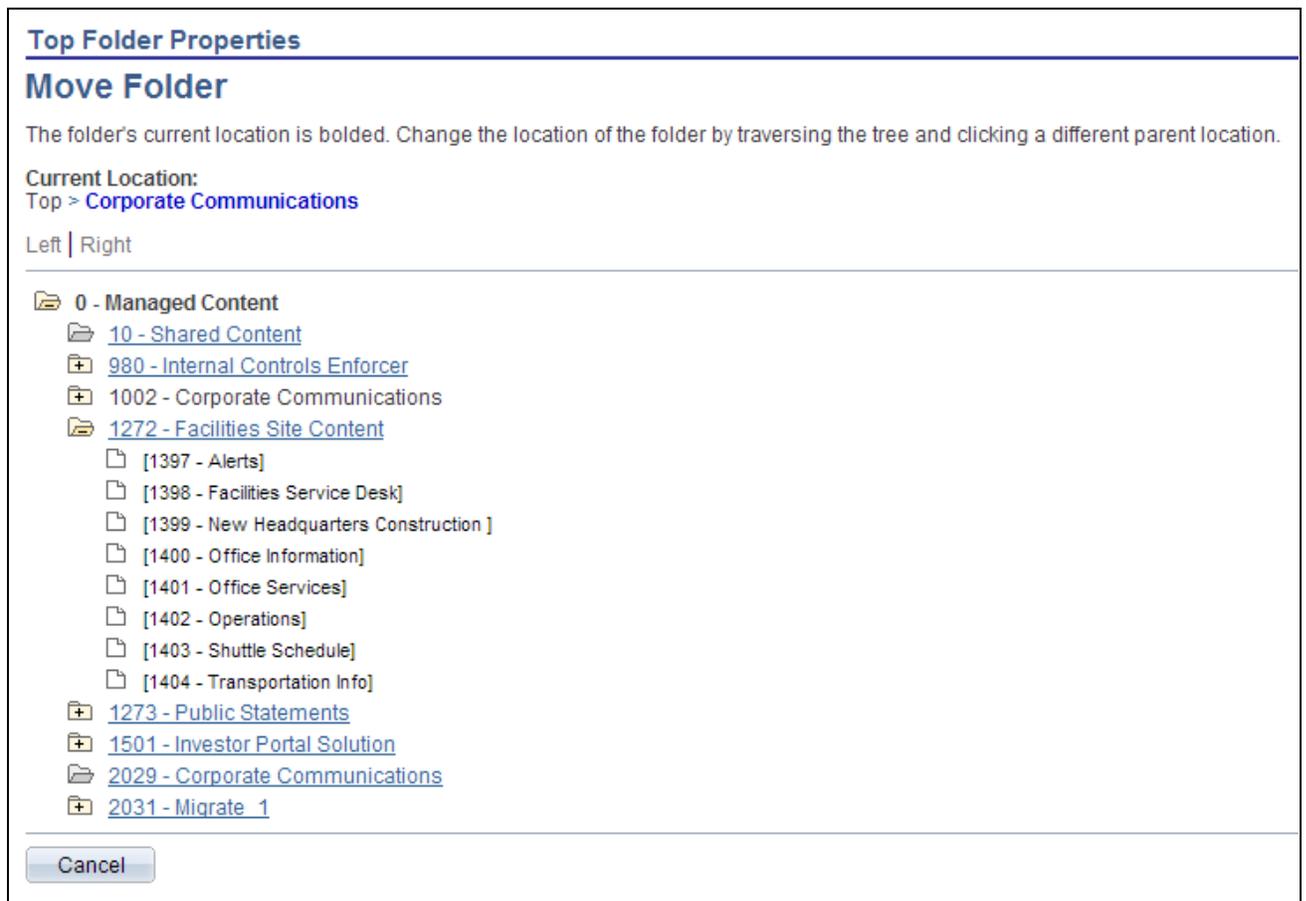
**Member Name**                      Select or enter the desired information into the Member Name field.

<b>Privilege Set</b>	Assign privileges to this member by selecting privilege sets.
<b>Privileges</b>	Displays the privilege sets that were defined for the Manage Content feature.
<b>OK</b>	Click this button to accept changes on the privilege sets and return to the Folder Security page.

**Note.** The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Managed Content feature.

## Moving Folders in Managed Content

Access the Top Folder Properties - Move Folder page (select Content Management, Managed Content, Browse Folders; click the Add Top Folder button; and click the Move Folder link on the Folder Properties page).



Top Folder Properties - Move Folder page

Use this page to change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature, or vice versa.

The folder in bold type represents the current parent location. To move a folder to a top folder position, select the *0-Managed Content* location.

Navigate the tree by clicking the folder icons and selecting a folder from the available values. The available values depend on your privileges. You must have the proper privileges to relocate to a new location—for example, you must have the *Delete Folder* privilege in the current location and the *Add Folder* privilege in the new location.

After you make the move, notice the locator links that indicate that the folder is now in a new location.

## Publishing a Folder as a Menu Item

Access the Folder Properties - Publish as Menu Item page (select Content Management, Managed Content, Browse Folders; click the Add Top Folder button; click the Publish as Menu Item link on the Folders Properties page).

**Folders Properties**

**Publish as Menu Item**

View, add, update or delete the navigation Menu Item for the folder. Change the Site Name value to access the Menu Items in different sites.

\*Site Name:  Employee-facing registry content

\*Menu Folder:

\*Menu Item:

Description:

**Menu Item Security**

Publish as Public

Publish with Security Roles

Folder Properties - Publish as Menu Item page

<b>Site Name</b>	Select the portal or site of the managed content that is being published.
<b>Menu Folder</b>	Select a folder to publish to. Only folders from the current site are available to select.
<b>Menu Item</b>	Enter the menu item title that will identify the menu item.
<b>Description</b>	Enter a meaningful description for this menu item.

**Menu Item Security** Select the security options for viewing the menu item. Available options are:

- *Publish as Public*, which enables all users to view the menu item.
- *Publish with Security Roles*, which uses the roles defined on the Folder Security page when publishing the menu item.

If you select this option, only defined roles are used to assign viewing privileges. If you add a user to the Folder Security page, that user will not have privileges to view the published menu item or published content unless that user also has one or more of the listed roles.

---

**Note.** If no roles are defined on the Folder Security page, the system automatically selects to publish the menu item as *Public*.

---

**Publish** Click to save and publish this content item.

Published content appears on the Browse by Category page to users who have the viewer roles for the parent folder where the content is located.

## Publishing a Folder as a Feed

Access the Top Folder Properties - Advanced Feed Options page (select Content Management, Managed Content, Browse Folders; click the Add Top Folder button; click the Publish as Feed link; click the Edit or Add Feed button; and then click the Advanced Option link).

---

**Note.** You can also publish subfolder if its publishing property is set to *Folder can be Published*.

---

**Top Folder Properties**  
**Advanced Feed Options**  
 Specify the advanced options of this feed.

Feed: Corporate Communications - MIG

**Feed Options**

\* Max Number of Entries:  (Enter 0 for unlimited number of entries.)

Corporate Communications - MIG		Customize   Find   View All   [Grid Icon]   [Print Icon]	First [Left Arrow] 1 of 1 [Right Arrow] Last
	Selected	Description	
1	<input type="checkbox"/>	Partners	

Reset to Defaults

OK Cancel

Top Folder Properties - Advanced Feed Options page

- Max Number of Entries** Specify the maximum number of feed entries that you want to display in the feed document.
  
- Selected** Select appropriate folders to publish as feeds.
  
- Reset to Defaults** Click to reset all parameters: Max Number of Entries is back to *10*, and sub-folder is *selected*.
  
- OK** Click to return to the Folder Properties - Publish as Menu Item page, and then click the Publish button to save and publish this content item as feed.

**Note.** See the Using Portal Features PeopleBook for how to view a list of feeds, define feed definition, and publish feed to site.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Feeds and Alerts."*

## Publishing a Folder as a Pagelet

This section discusses how to:

- Publish a pagelet from a folder.
- Publish a folder from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

### Pages Used to Publish a Folder as a Pagelet

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Folder Properties - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	<ul style="list-style-type: none"> <li>• Content Management, Managed Content, Browse Folders</li> </ul> <p>Click the Properties link for the folder.</p> <p>Click the Publish as Pagelet link on the Folder Properties page.</p> <ul style="list-style-type: none"> <li>• Click the Add Pagelet button or the Edit button on the Folder Properties - Publish as Pagelet page.</li> </ul>	Create a pagelet definition for a folder.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Preview Pagelet	EPPPB_PGLT_PREVIEW	Click the Preview Pagelet link on the Folder Properties - Publish Pagelet Wizard Definition page.	Preview a list pagelet.
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	<ul style="list-style-type: none"> <li>Click the Go to Pagelet Wizard link on the Folder Properties - Publish Pagelet Wizard Definition page.</li> <li>Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard</li> <li>PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard</li> <li> Click the Pagelet Information button from any page in the wizard.</li> </ul>	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Pagelet Information page.</li> <li> Click the Data Type button from any page in the wizard.</li> </ul>	Select the type of data source for the pagelet.
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Select Data Source page.</li> <li> Click the Data Source Parameters button from any page in the wizard.</li> </ul>	<p>Configure the data source parameters that are required for data to be displayed in the pagelet.</p> <p><b>Note.</b> This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet.  <b>Note.</b> This page is accessible only for data source parameters for which you have selected the <i>User Specified</i> or <i>Admin Specified</i> usage types.
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page.</li> <li> Click the Display Format button from any page in the wizard.</li> </ul>	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options (passthru format)	PTPPB_WIZ_DISP_PST	<ul style="list-style-type: none"> <li>Select <i>Passthru</i> as the display format and click the Next button on the Select Display Format page.</li> <li> Click the Transformation button from any page in the wizard.</li> </ul>	Enter pagelet pass through formatting details and header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Display Options (menu format)	PTPPB_WIZ_DISP_NAV	<ul style="list-style-type: none"> <li>Select <i>Menu</i> as the display format and click the Next button on the Select Display Format page.</li> <li> Click the Transformation button from any page in the wizard.</li> </ul>	Enter the pagelet menu formatting details and header and footer options. Preview the pagelet.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Pagelet Wizard - Specify Display Options (custom format)	PTPPB_WIZ_DISP_CUS	<ul style="list-style-type: none"> <li>Select <i>Custom</i> as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.</li> <li> Click the Transformation button from any page in the wizard.</li> </ul>	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Display Options page.</li> <li> Click the Register Pagelet button from any page in the wizard.</li> </ul>	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.
Folder Properties - Publish as Pagelet	EPPCM_CATG_PGLT	<ul style="list-style-type: none"> <li>Click the Publish button on the Folder Properties - Publish Pagelet Wizard Definition page.</li> <li>If this folder has already been published as a pagelet, click the Publish as Pagelet link on the Folder Properties page.</li> </ul>	Administer pagelet definitions for an action item list.
Publish to Multiple Portals	PTPP_PMPUBPRTL	<ul style="list-style-type: none"> <li>Click the Publish Pagelet in Other Sites link on the Folder Properties - Publish Pagelet Wizard Definition page.</li> <li>Portal Administration, Pagelets, Publish Pagelets</li> <li>PeopleTools, Portal, Portal Utilities, Publish Pagelets</li> </ul>	Publish the pagelet definition to additional portals and sites.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publish Multiple Pagelets	PTPP_PMPUBPGLT	<ul style="list-style-type: none"> <li>• On the Publish to Multiple Portals page, select the Publish Multiple Pagelets tab.</li> <li>• Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets</li> <li>• PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets</li> </ul>	Publish multiple pagelet definitions to another portal or site.

## Publishing a Pagelet from a Folder

Access the Folder Properties - Publish Pagelet Wizard Definition page (select Content Management, Managed Content, Browse Folders; click the Properties link; click the Publish as Pagelet link on the Folders Properties page).

### Folders Properties

## Publish Pagelet Wizard Definition

Set the values to create or update a Pagelet Wizard pagelet definition for this item.

**Pagelet**

\*Pagelet Title:

Description:

\*Pagelet Folder:

**Pagelet Security**

Publish as Public

Publish with Security Roles

**Homepage Tabs** Customize | Find | View All | | First 1-4 of 4 Last

Select	Homepage Tab	*Pagelet Behavior
<input type="checkbox"/>	My Page	Optional
<input type="checkbox"/>	Guest	Optional
<input type="checkbox"/>	Investor	Optional
<input type="checkbox"/>	Administration	Optional

Folders Properties - Publish Pagelet Wizard Definition page

**Note.** The Folder Properties - Publish Pagelet Wizard Definition page appears when a folder has never been published as a pagelet. The Folders Properties - Publish as Pagelet page appears after a folder has been published as a pagelet.

**Pagelet**

The pagelet title and description from the Folder Properties page appear in the pagelet section. You may edit these two fields as necessary.

**Pagelet Title**                      Enter the pagelet title that will identify the pagelet.

**Description**                        Enter a meaningful description for this pagelet.

**Pagelet Folder**                    Select a folder to publish to. Only folders from the current site are available to select.

- Pagelet Security** Select the security options for viewing the pagelet. The available options are:
- *Publish as Public*, which enables all users to view the pagelet.
  - *Publish with Security Roles*, which uses the roles defined on the Folder Security page when publishing the pagelet.

---

**Note.** If no roles are defined on the Folder Security page, the system automatically selects to publish the pagelet as *Public*.

---

## **Homepage Tabs**

Use the Homepage Tabs section to define the homepage tab labels and behavior for the pagelet.

**Homepage Tab** Select the tabs that will display the pagelet.

**Pagelet Behavior** Select the behavior options for the pagelet. The available options are:

- *Optional*

The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.
- *Optional-Default*

The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.
- *Required-Fixed*

The pagelet will appear on all user homepages if users have access to the pagelet. The placement of the pagelet cannot be changed, and the pagelet cannot be removed from the homepage.
- *Required*

The pagelet will appear on all user homepages if the user has access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

**Publish** Click to display the Publish as Pagelet page, where you can review or edit the pagelet definition.

## Publishing a Folder from Pagelet Wizard

Pagelets for folder can be created and published using Pagelet Wizard and then managed from the Folder Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note.** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a folder as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard."

### **Step 1: Entering Pagelet Identifying Information**

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Folder Properties - Publish Pagelet Wizard Definition page).

**Pagelet Wizard**
**Step 1 of 6**

1
2
3
4
5
6

Next >

## Specify Pagelet Information

The following information will be used to identify and categorize your pagelet.

**Pagelet Information**

Pagelet ID: PAPP\_COMPANY\_NEWS

\*Pagelet Title:

Description:

Owner ID:  ▼

Category ID:  ▼

Help URL:

Pagelet Wizard - Specify Pagelet Information page

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

### **Step 2: Selecting a Pagelet Data Type**

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).

---

**Note.** The fields that appear on this page depend on the Data Type value that you select.

---

This example shows Pagelet Wizard - Select Data Source page with *Content Management* data type:

**Pagelet Wizard** Step 2 of 6

1 2 3 4 5 6 < Previous Next >

## Select Data Source

Select the type of data and specify the source which contains the data you want displayed in your pagelet.

Partners

\*Data Type:

**Description**

The Content Management DataType can retrieve data from Text/HTML entries from Managed Content inside the Content Management system.

**Data Source**

Folder ID:

Content ID:

Content Path: EMPLOYEE > Corporate Communications > Products > Portal Solutions Overview

Pagelet Wizard - Select Data Source page (Content Management data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

### Data Type

Use the *Content Management* data type (CMDATASOURCE) to make a Pagelet Wizard pagelet a publishing tool for a single piece of managed content or categorized content that is stored in content management system.

If you select the *Content Management* option, these fields appear: Folder ID, Content ID, and Content Path.

---

**Note.** Approved text or HTML content in the PeopleSoft Content Management system can be used as base data for a Pagelet Wizard pagelet.

When you select *Content Management* as the data source, the pagelet does not provide configurable data source parameters. Consequently, when creating a Content Management data source pagelet, you bypass step 3 and proceed to step 4, in which you select the pagelet display format.

When the contents are not well formatted XML, Content Management data source pagelets will not be compatible with the *Custom* display format.

---

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 2: Selecting a Pagelet Data Type.

### Folder ID

Select the Content Management folder in which the content resides.

### Content ID

Select the Content Management content that you want to use as the data source for the pagelet.

**Content Path** Displays the Content Management site and folder path to the content.

This example shows Pagelet Wizard - Select Data Source page with *Content Management Folder* data type:

Pagelet Wizard - Select Data Source page (Content Management Folder data type)

**Data Type** Use the *Content Management Folder* data type (CMFOLDERDATASOURCE) to create a Pagelet Wizard pagelet that displays the content management child items (content and folders) for a given managed content or categorized content folder.

If you select the *Content Management Folder* option, these fields appear: Site Name, Folder ID, and Folder Title.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 2: Selecting a Pagelet Data Type.

**Site Name** Select the name of the site you want to use as the source of content for the pagelet.

**Folder ID** Select the parent folder that you want to use as the source of content for the pagelet.

**Folder Title** The system displays the name of the folder you've selected.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 2: Selecting a Pagelet Data Type.

See [Chapter 4, "Setting Up and Working With Managed Content," page 81.](#)

### Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Content Management Folder* as the data type on the Pagelet Wizard - Select Data Source page, and click the Next button).

**Pagelet Wizard**
**Step 3 of 6**

1
2
3
4
5
6

< Previous
Next >

## Specify Data Source Parameters

Specify the parameters and their associated options specific to the data source you have selected for your pagelet. Rows showing a selected 'Required' require a Default Value.

Partners

Field Name	Description	*Usage Type	Required	Default Value	
.INCLUDECHILDREN	Include Children	Fixed <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>	Y	<a href="#">Values</a>
.MAXCHILDLINKS	Maximum Child I	Admin Specified <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>	10	
.SHOWFEEDLINKS	Show Feed Link	User Specified <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>	Y	<a href="#">Values</a>

**Personalization Instructions**

Specify the text that should appear on the personalization page for this pagelet.

**Text:**

Reset to Default

Pagelet Wizard - Specify Data Source Parameters page (folder data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

- |                   |   |
|-------------------|---|
| <b>Field Name</b> | <p>Displays the name of the data source parameter.</p> <ul style="list-style-type: none"> <li>• <i>.INCLUDECHILDREN</i>: Determines whether the pagelet displays Navigation Collection child links.</li> <li>• <i>.MAXCHILDLINKS</i>: If the pagelet is defined to display child links, determines the maximum number of Navigation Collection child links to display.</li> <li>• <i>.SHOWFEEDLINKS</i>: Determines whether the pagelet displays feed links.</li> </ul> |
|-------------------|---|

<b>Description</b>	Displays a description of the data source parameter.
<b>Usage Type</b>	<p>Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:</p> <ul style="list-style-type: none"> <li>• <i>Admin Specified</i>: Select to enable those users with administrative privileges to specify variables for this field, as well as access the <b>Configure</b> link on the published pagelet and select from those parameters for users.</li> <li>• <i>Context Sensitive</i>: Select to enable Context Manager to specify a data source parameter value for this field.</li> </ul> <p>If you change the usage type from or to <i>Context Sensitive</i> for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.</p> <ul style="list-style-type: none"> <li>• <i>Fixed</i>: Select to enter a fixed value for the data source parameter that the end user cannot modify.</li> <li>• <i>System Variable</i>: Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.</li> </ul> <p>For example, suppose that you specify <i>%UserId</i> as the system variable for a parameter name <i>User</i>. When the pagelet appears on a user's homepage, the <i>User</i> field is populated by the <i>%UserId</i> system variable, which is the user ID used to access the pagelet.</p> <ul style="list-style-type: none"> <li>• <i>User Specified</i>: Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the <b>Customize</b> button appears on the pagelet title bar.</li> </ul> <p>End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i>, "Working With Action Items," Publishing an Action Item List from Pagelet Wizard.</p> <p>If you change the usage type from or to <i>User Specified</i> for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.</p>
<b>Required</b>	This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

**Default Value**

You can enter a value that includes the % and \* wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date*.

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click the Values link to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items," Publishing an Action Item List from Pagelet Wizard.

**Text**

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

---

**Note.** Personalization instructions must be translatable.

---

**Specifying Prompt Values for Data Source Parameters**

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).

**Pagelet Wizard**  
**Specify Data Source Parameter Values**

List the parameter values available for a user to select for the Data Source Parameter Name.

Field Name: .INCLUDECHILDREN      Include Children

Parameter Values			
Parameter Value	Description	Default	
1 N	No	<input type="checkbox"/>	
2 Y	Yes	<input checked="" type="checkbox"/>	

OK      Cancel

Pagelet Wizard - Specify Data Source Parameter Values page (folder data source)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

<b>Parameter Value</b>	Specify the parameter value.
<b>Description</b>	Provide an optional description of the parameter value.
<b>Default</b>	Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 3: Specifying Data Source Parameters.

#### **Step 4: Selecting a Pagelet Display Format**

Access the Pagelet Wizard - Specify Display Format page by one of the following methods:

- Selecting *Content Management* as the data type and click the Next button on the Pagelet Wizard - Select Data Source page.
- Clicking the Next button on the Pagelet Wizard - Specify Data Source Parameters page.

---

**Note.** The display formats that appear on this page depend on the data type that you selected on the Pagelet Wizard - Select Data Source page.

---

This example shows the Pagelet Wizard - Select Display Format page with *Content Management* data type selected in the Pagelet Wizard - Select Data Source page:

**Pagelet Wizard**
**Step 4 of 6**

1
2
3
4
5
6

< Previous
Next >

## Select Display Format

Select the format in which you would like your pagelet data rendered.

Partners

Specify Display Options
First 1-2 of 2 Last

	Display Format	Name	Description
<input checked="" type="radio"/>		<b>Passthru</b>	Display your pagelet data with no visual transformation. The data source controls the look and feel.
<input type="radio"/>		<b>Custom</b>	Specify your own custom display transformation (XSL template) for your pagelet

Pagelet Wizard - Select Display Format page with Content Management data type selected in the Pagelet Wizard - Select Data Source page

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

**Passthru**                      Display the pagelet with no visual transformation.

**Custom**                      Content Management data source pagelets will not be compatible with the *Custom* display format, when the contents are not well formatted XML. If you select the Custom option, in that case an error message appears asking you to correct the problem before continuing.

This example shows the Pagelet Wizard - Select Display Format page with *Content Management Folder* data type selected in the Pagelet Wizard - Select Data Source page:

**Pagelet Wizard**
**Step 4 of 6**

123456

< Previous
Next >

## Select Display Format

Select the format in which you would like your pagelet data rendered.

Partners

Specify Display Options
First 1-2 of 2 Last

	Display Format	Name	Description
<input checked="" type="radio"/>		<b>Menu</b>	Display your pagelet data as a categorized tree or list-based navigational menu, with extensive visual options
<input type="radio"/>		<b>Custom</b>	Specify your own custom display transformation (XSL template) for your pagelet

Save
Notify

Pagelet Wizard - Select Display Format page with Content Management Folder data type selected in the Pagelet Wizard - Select Data Source page

**Menu** Select to display the pagelet as a categorized tree or list-based navigation menu.

**Custom** Select to specify a custom display transformation (XSL template) for your pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

### **Step 5: Specifying Pagelet Display Options**

Access the Pagelet Wizard - Specify Display Options page by one of the following methods:

- Selecting *Passthru* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.
- Selecting *Menu* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.
- Selecting *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.

---

**Note.** The fields that appear on this page depend on the display format that you selected on the Pagelet Wizard - Select Display Format page.

---

This example shows Pagelet Wizard - Select Display Options page with *Passthru* display format selected in the Pagelet Wizard - Select Display Format page. Use this page to enter the pass through formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

**Pagelet Wizard**
**Step 5 of 6**

123456

< Previous
Next >

## Specify Display Options

Specify the visual options related to the display format for your pagelet.

Partners

**Additional Text**

Header: PeopleSoft Logo

Opening Text:

Closing Text:

Footer: Powered by PeopleSoft

**Search Options**

Search is supported for homepage pagelets and embeddable pagelets only.

\*Search Box: No Search Box

[Custom Search Class](#)

**Pagelet Preview**



Signature: Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned thereunto duly authorized. GBI Corporation Date: April 29, 2002 By: /s/ Chris Leone Chris Leone Senior Vice President; Chief Financial Officer (Principal Financial and Accounting Officer and Duly Authorized Officer)

[Edit Content](#)

Pagelet Wizard - Select Display Options page with Passthru display format selected in the Pagelet Wizard - Select Display Format page

This example shows Pagelet Wizard - Select Display Options page with *Menu* display format selected in the Pagelet Wizard - Select Display Format page. Use this page to enter the menu formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

**Pagelet Wizard**
**Step 5 of 6**

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Next >

## Specify Display Options

Specify the visual options related to the display format for your pagelet.

Partners

**Menu Options**

Top Level Title

Top Level Description

\*Maximum Columns

\*Display Order

Alternate Row Shading

\*Parent Images

Parent Descriptions

\*Child Display Type

**Additional Text**

Header

Opening Text

Closing Text

Footer

**Search Options**

Search is supported for homepage pagelets and embeddable pagelets only.

\*Search Box

**Customization**

**Pagelet Preview**

**Partners**

Information about software Partners, Certification, and consultants

Introductory page to Partnership information

Brief overview of Consultant Partner Program

Brief overview of Software Partner Program

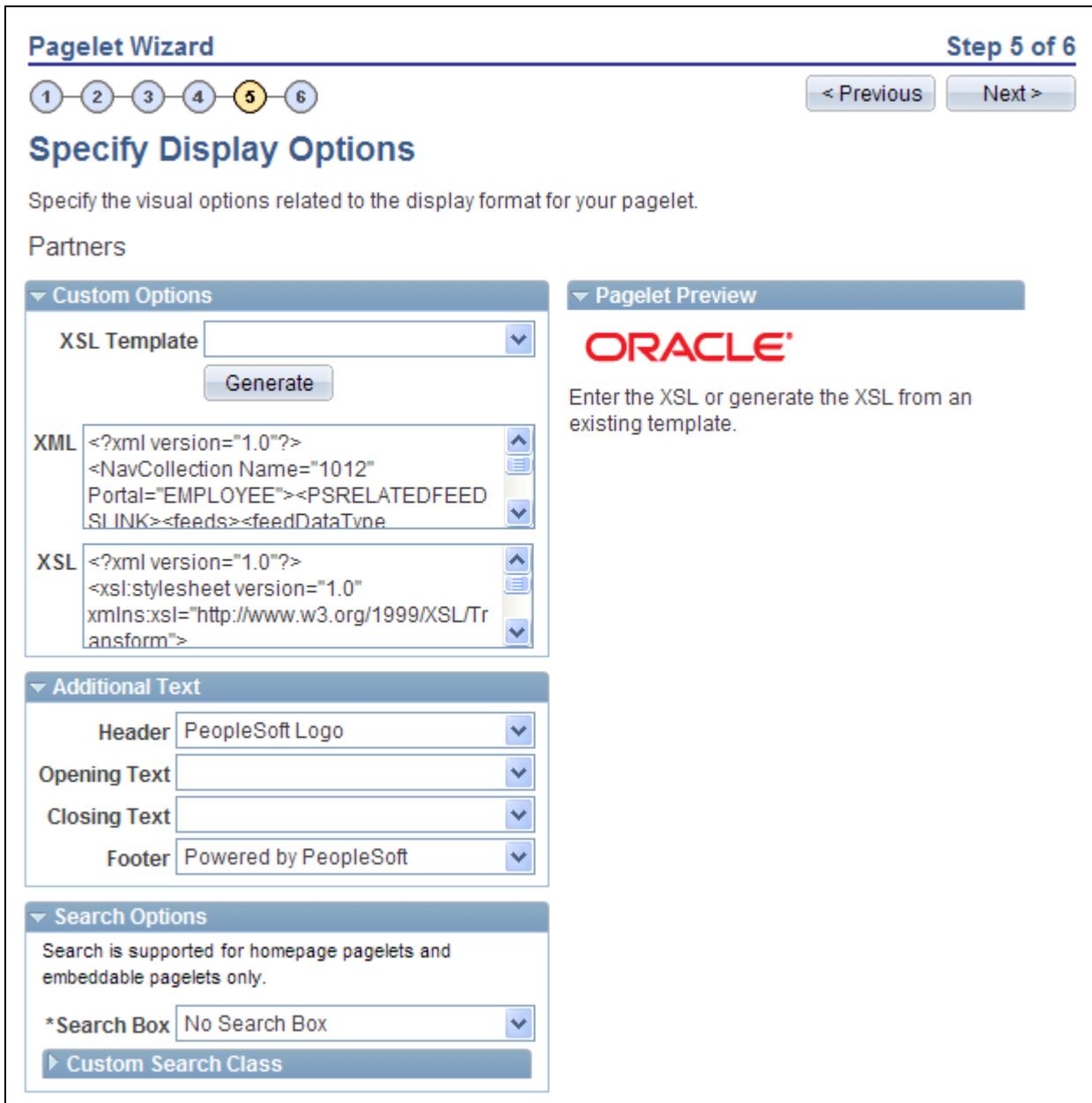
Different types of partners offer different value and opportunities. The partner program is designed with specific partnership tracks, types, criteria and benefits tailored to meet your company objectives.

Pagelet Wizard - Specify Display Options page with Menu display format selected in the Pagelet Wizard - Select Display Format page

This example shows Pagelet Wizard - Select Display Options page with *Custom* display format selected in the Pagelet Wizard - Select Display Format page. Use this page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet:

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Pagelet Wizard - Select Display Options page with Custom display format selected in the Pagelet Wizard - Select Display Format page

**Note.** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

**Step 6: Specifying Pagelet Publication Options**

Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

**Pagelet Wizard**
**Step 6 of 6**

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## Specify Publishing Options

Specify the manner in which your pagelet is published.

**Partners**

**Homepage Pagelet**  
 Publishing as a Homepage Pagelet allows this pagelet to be placed on a user's Homepage tab. Homepage Pagelets are organized by pagelet folders.  
 Folder:  ▼  

▶ Advanced Options

▶ WSRP Options

**Template Pagelet**  
 Publishing as a Template Pagelet allows this pagelet to be used with any template. For the Context Manager template, this pagelet can be context sensitive to the target transaction.  

▶ Advanced Options

▶ WSRP Options

**Embeddable Pagelet**  
 Publishing as an Embeddable Pagelet allows this pagelet to be rendered on a target transaction page. The target transaction executes this pagelet from the Pagelet Wizard API.

▼ **Pagelet Security**

**\*Security Type:**  ▼
 **Author Access**
Update Security

*Type	Name	Description		
Role <span style="font-size: 0.8em;">▼</span>	PAPP_CONTENT_ADMIN <span style="font-size: 0.8em;">🔍</span>	Content Administrator	+	-
Role <span style="font-size: 0.8em;">▼</span>	PAPP_CUSTOMER <span style="font-size: 0.8em;">🔍</span>	Portal Customer	+	-
Role <span style="font-size: 0.8em;">▼</span>	PAPP_PUBLISHER <span style="font-size: 0.8em;">🔍</span>	Content Publisher	+	-

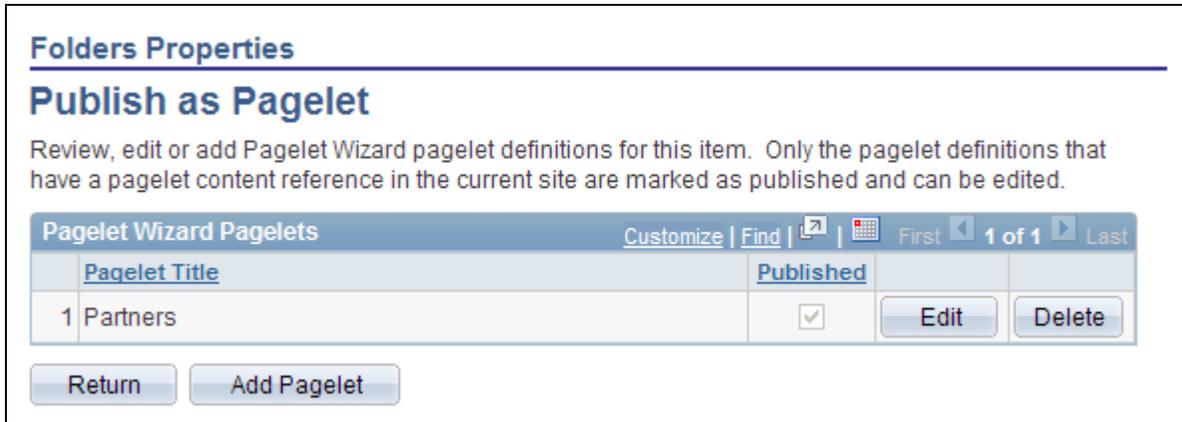
Pagelet Wizard - Specify Publishing Options page

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

## Editing a Published Pagelet

Access the Folder Properties - Publish as Pagelet page (click the Publish button on the Folder Properties - Publish Pagelet Wizard Definition page; or if this action item list has already been published as a pagelet, click the Publish as Pagelet link on the Folder Properties page).



Folder Properties - Publish as Pagelet page

Use the Folder Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this folder. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

---

**Note.** Pagelets for this folder published directly from Pagelet Wizard also appear in this list.

---

<b>Published</b>	Indicates the whether the pagelet is published.
<b>Edit</b>	Click to access the Folders Properties - Publish Pagelet Wizard Definition page, where you can edit pagelet definitions.
<b>Delete</b>	Deletes this pagelet definition and the published pagelet content references in all sites.
<b>Add Pagelet</b>	Click to access the Folder Properties - Publish Pagelet Wizard Definition page, where you can publish content as a pagelet to a site or portal.

## Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the Folder Properties - Publish Pagelet Wizard Definition page).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.

Publish to Multiple Portals
Publish Multiple Pagelets

Publishing a pagelet entails copying it from the Source Portal to the Target Portal. Selecting a Target Portal where the pagelet already exists will overwrite the Target Portal's pagelet.

**Pagelet**

\*Source Portal:  Employee-facing registry content

Pagelet Type:  Homepage Pagelet  Template Pagelet

\*Pagelet Name:  Partners

**Target Portals** Customize | Find | View All | First 1-6 of 6 Last

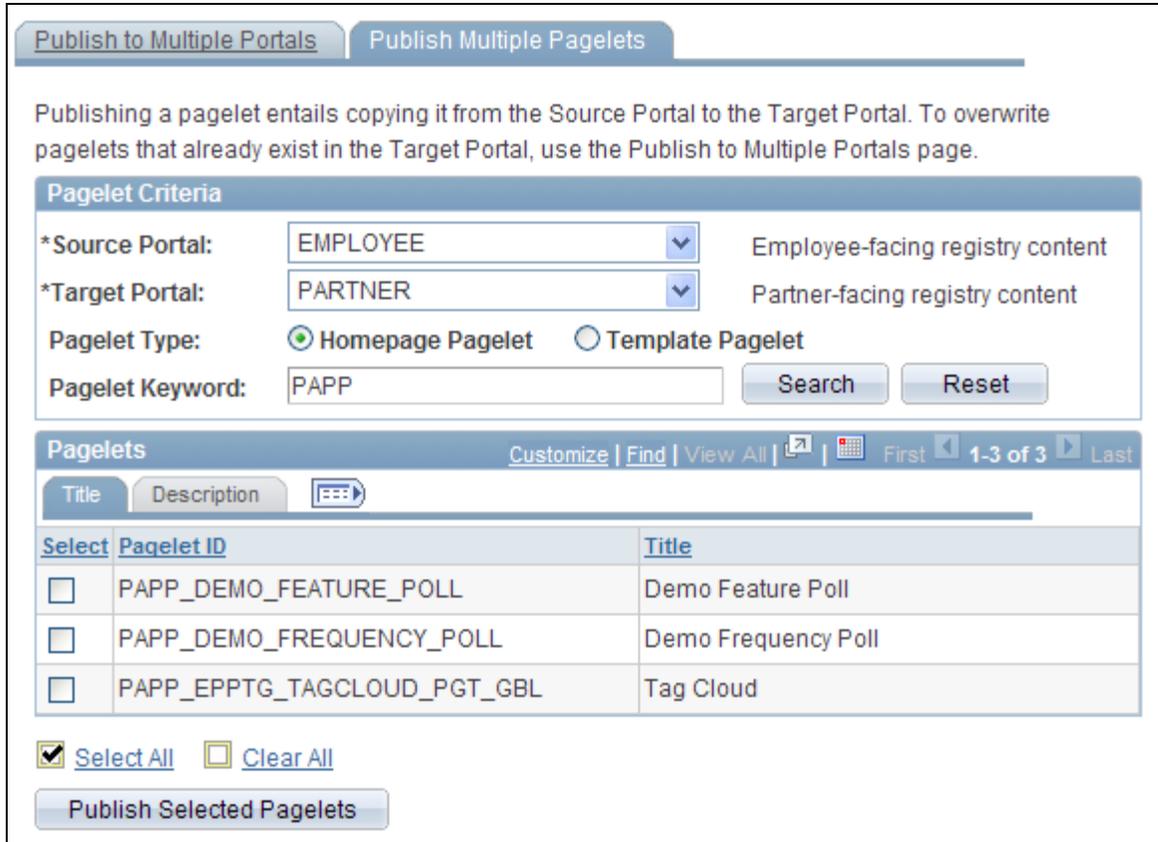
	Title	Description	
Select	Portal Name	Pagelet Exists As	
<input type="checkbox"/>	CUSTOMER		
<input type="checkbox"/>	DEMOSITE		
<input checked="" type="checkbox"/>	EMPLOYEE	Partners	<a href="#">Go to Tab Content / Layout</a>
<input type="checkbox"/>	PARTNER		
<input type="checkbox"/>	PS_SITETEMPLATE		
<input type="checkbox"/>	SUPPLIER		

[Select All](#)
 [Clear All](#)

[Publish Pagelet](#)

Publish to Multiple Portals page

- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.



Publish Multiple Pagelets page

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Working With Navigation Pages," Publishing Pagelets.

## Adding New Managed Content

This section provides an overview of content types and discusses how to:

- Add new content to Managed Content folders.
- Add content attachments.

## Understanding Content Types

Based on the type of content you select, you must either upload attachments, enter URL information, or create the document using text or HTML.

This table describes the types of content you can add:

<b>Content Type</b>	<b>Description</b>
File attachment	Upload a file to the file storage (record based BLOB or the web server).
Text or HTML	Create a document using either text or HTML.
Image attachment	Upload a file attachment image to the web server and enable it to render as an image.
Image URL	Enter the URL of an already web-enabled image.
Web site URL	Enter the URL of a web site.

## Pages Used to Add New Managed Content

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Browse Managed Content - Add Content	EPPCM_ADDCONT_SEC	Content Management, Managed Content, Browse Folders  Click a folder title and click the Add Content button on the Browse Managed Content page.	Specify the type of content you want to add to a folder in managed content.
Content Attachment Properties	EPPCM_CONT_MAIN	Content Management, Managed Content, Browse Folders  Click a folder title and click the Add Content button on the Browse Managed Content page.  Select a content type from the drop-down list and click the OK button.	Enter content properties such as title, summary, and content location to submit content for publication and to maintain comments or discussions specific to that piece of content, among other functions.  <b>Note.</b> After you select a content type, a Content Attachment Properties page appears based on the content type you selected. When content is added to managed content, its status is set to checked out.
Content Attachment Properties - Content Locations	EPPCM_CONT_LOC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Locations link on the Content Properties page.	Move content to a different folder or add more locations.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Content Attachment Properties - Add Content Locations	EPPCM_CONT_TREEADD	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Locations link on the Content Properties page.  Click the Add Location link on the Content Attachment Properties - Content Locations page.	Select new locations for the content.
Content Attachment Properties - Move Content	EPPCM_CONT_TREEMOD	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Locations link on the Content Properties page.  Click the Move button on the Content Locations page.	Move content to a new folder.
Content Notification	EPPCM_CONT_NTFY	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Notifications link on the Content Properties page.	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Comments link on the Content Properties page.	Enter additional comments about this content item.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Post Details	EPPDF_VIEW_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Start Discussion link on the Content Properties page.  Click Yes-Start Discussion on the Start Discussion Confirmation page.	Start a new discussion or edit an existing discussion for this content item.
Edit a Post	EPPDF_REPLY_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Start Discussion link and click the Yes-Start Discussion button.  Click the Edit button on the Post Details page.	Edit an existing discussion.
Add a Reply	EPPDF_REPLY_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a content title link.  Click the Start Discussion link and click the Yes-Start Discussion button.  Click the Reply button on the Post Details page.	Respond to a discussion.

## Adding New Content to Managed Content Folders

Access the Browse Managed Content - Add Content page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click the Add Content button on the Browse Managed Content page).

**Browse Managed Content**

**Add Content**

Select the type of content to add. Select 'Managed Content', as the content type, to import existing managed content into this folder.

Add To Folder: Corporate Communications

\*Content Type:

OK Cancel

Browse Managed Content - Add Content page

**Add To Folder** Displays the name of the folder that the content is being added to.

**Content Type** Select a content type. The available options are:

- *File Attachment*: Upload files into Content Management.
- *Image Attachment*: Upload an image file.
- *Image URL*: Upload a web-enabled image file URL.
- *Text or HTML*: Use HTML or text to be rendered as HTML.
- *Web Site URL*: Enter a web URL.

**OK** After you select a content type and click this button, a Content Attachment Properties page appears based on the content type you selected.

## Adding Content Attachments

Access the Content Attachment Properties page (select Content Management, Managed Content, Browse Folders; click a folder title, and click the Add Content button; select a content type and click the OK button).

---

**Note.** The name that appears on this page depends on the content type that you selected on the Browse Managed Content - Add Content page.

---

This example shows the File Attachment Properties page with the *File Attachment* option selected in the Browse Managed Content - Add Content page:

**File Attachment Properties** Feed ▾

[Top](#) > [Corporate Communications](#)

\*Title:

\*Source:  Inactive Date:

\*Summary:

Checked Out: 07/17/09 12:26PM Checked Out By: [Vice President of Finance](#)

**File Attachment**

File Name:

Approver:

Version: 1 Version Status: In Draft

Created: 07/17/2009 12:26PM Created By: [Vice President of Finance](#)

Tags

[Locations](#) [Versions](#) [Notifications](#) [Comments](#) [Search Content](#)

[Return to Browse Managed Content](#)

File Attachment Properties page with the File Attachment option selected in the Browse Managed Content - Add Content page

Use the File Attachment Properties page to add new file contents to Managed Content folders.

### Feed

Click to open the feed contain this item, if available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts."

### Inactive Date

Displays the inactive date based on the default inactive date of the folder.

Content with an inactive date previous to the current date does not appear in the content list of the Browse Content or the My Content pages. However, inactive content is still accessible from the Maintain Content search page. Content that is archived and published elsewhere is still visible from where it is published. The publishing feature such as News Publication or Manage Navigation uses the expiration date to control when the content no longer appears.

### Check Out

Displays the date and time when the content was last checked out.

### Check Out By

Displays the user name who checked out the content.

Click the name link to access the Instant Message page, where you can send a instant message to the person who checked out the content.

<b>Upload File</b>	<p>Click to open a new browser window where you can select a file to upload.</p> <hr/> <p><b>Note.</b> Uploaded files are saved automatically.</p>
	<p>When the folder properties are set to auto-approved, the Version Status field indicates that new content is approved when it is added.</p> <hr/>
<b>Approver</b>	<p>Select the ID of the user who is assigned to approve the content.</p> <p>After this field is populated and the content is checked in, the Submit for Approval button appears. Approvers are folder members with the approval privilege.</p> <hr/> <p><b>Note.</b> Only one approver can be assigned and only one level of approval is built in. If you need more levels of approval, you can increment the version as each version has its own approval cycle.</p>
	<p>Approvers are only available for content that is created with the <i>Require Approval</i> option selected.</p> <hr/>
<b>Version Status and Version</b>	<p>System assigns a status of <i>In Draft</i> and the version number <i>1</i> for new content.</p> <hr/> <p><b>Note.</b> When the folder properties are set to auto-approved, the Version Status field indicates that new content is approved when it is added.</p> <hr/>
<b>Tag</b>	<p>Click to expand and access the content properties to view or edit tags.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i>, "Working With Tags."</p>
<b>Save</b>	<p>Click to add content to managed content.</p> <p>After you click this button, the content status is set to checked out and the Cancel Check Out button appears.</p>
<b>Check in</b>	<p>Click to unlock the content item and make it accessible to authorized folder members for review or edit.</p> <hr/> <p><b>Note.</b> The Check In and Cancel Check Out buttons are replaced with the Check Out and Submit For Approval buttons.</p> <hr/>
<b>Locations</b>	<p>Click to move this content item to a different folder or add it to multiple folders, as well as view all the locations for the content.</p> <hr/> <p><b>Note.</b> When using the Managed Content feature, the Locations page shows all the locations for all the feature types where the content exists. The Location page for all other feature types will show only the locations for the current feature type.</p> <hr/>
<b>Versions</b>	<p>Click to access the File Attachment Properties - Content Versions page, where you can review, delete, or check out different versions of a specific content item.</p>

<b>Notifications</b>	Click to create a list of interested parties or to send email notifications of saved content to the list of interested parties.
<b>Comments</b>	Click to add additional comments about this content item. <hr/> <b>Note.</b> Comments are auto-generated for created versions. Comments can be added or updated only to the current version for the content. <hr/>
<b>Search Content</b>	Click to search for existing content items. See <a href="#">Chapter 3, "Accessing Content," Searching for Folders and Content, page 74.</a>
<b>Start Discussions</b>	Click the Start Discussions link to begin a discussion topic. <hr/> <b>Note.</b> Discussion topics stay with the content item. They cannot be accessed outside of the Content Properties page. <hr/>
<b>View Discussions</b>	If a discussion topic already exists, click to view, edit, or enter a response to it.
<b>Return to Browse Managed Content</b>	After you have completed attaching a file, click this link to return to the Browse Managed Content page.

### ***Adding Image Attachment***

This example shows the Image Attachment Properties page with the *Image Attachment* option selected in the Browse Managed Content - Add Content page:

## Image Attachment Properties Feed ▾

[Top](#) > [Shared Content](#)

\*Title:

\*Source:       Inactive Date:

\*Summary:

Checked Out: 07/28/09 12:54PM      Checked Out By: [Vice President of Finance](#)

### Image Attachment

File Name:

Height:       Width:       Border Width:

Hover Text:

Approver:

Version: 1      Version Status: In Draft

Created: 07/28/2009 12:54PM      Created By: [Vice President of Finance](#)

▸ Tags

[Locations](#)   [Versions](#)   [Notifications](#)   [Comments](#)      [Search Content](#)

[Return to Browse Managed Content](#)

Image Attachment Properties page with the Image Attachment option selected in the Browse Managed Content - Add Content page

Use the Image Attachment Properties page to add new image contents to Managed Content folders.

**Height**      Use this property to specify the height of the image. This property takes a numeric value. The unit of measurement is pixels.

**Width**      Use this property to specify the width of the image. This property takes a numeric value. The unit of measurement is pixels.

**Border Width**      Specify the width of lines in the border. This property takes a numeric value. The unit of measurement is pixels.

**Hover Text**      Enter the text or mouse-over text that displays additional or supplemental information about the image.

### ***Adding Image URL***

This example shows the Image URL Properties page with the *Image URL* option selected in the Browse Managed Content - Add Content page:

## Image URL Properties Feed ▾

[Top](#) > [Shared Content](#)

\*Title:

\*Source:  Inactive Date:

\*Summary:

Checked Out: 07/28/09 12:58PM Checked Out By: [Vice President of Finance](#)

**Image URL**

URL:

Approver:

Version: 1 Version Status: In Draft

Created: 07/28/2009 12:58PM Created By: [Vice President of Finance](#)

Tags

[Locations](#)
[Versions](#)
[Notifications](#)
[Comments](#)
[Search Content](#)

[Return to Browse Managed Content](#)

Image URL Properties page with the Image URL option selected in the Browse Managed Content - Add Content page

Use the Image URL Properties page to add new image URL contents to Managed Content folders.

**URL** Enter any HTTP-accessible URL as the new image URL for the content folder.

### ***Adding Text or HTML***

This example shows the Text or HTML Properties page with the *Text or HTML* option selected in the Browse Managed Content - Add Content page:

## Text or HTML Properties Feed

[Top](#) > [Corporate Communications](#)

\*Title:

\*Source:   Inactive Date:

\*Summary:

Checked Out: 08/27/09 11:19AM Checked Out By: [Vice President of Finance](#) 

**Text or HTML**

 Preview



Approver:

Version: 1 Version Status: In Draft

Created: 08/27/2009 11:19AM Created By: [Vice President of Finance](#)

**Tags**

[Locations](#)
[Versions](#)
[Notifications](#)
[Comments](#)
[Search Content](#)

[Return to Browse Managed Content](#)

Text or HTML Properties page with the Text or HTML option selected in the Browse Managed Content - Add Content page

Use the Text or HTML Properties page to add text or HTML contents to Managed Content folders.

**Text or HTML** Enter the text or HTML code that you want to use as the source for the content folder.

### ***Adding Web Site URL***

This example shows the Web Site URL Properties page with the *Web Site URL* option selected in the Browse Managed Content - Add Content page:

## Web Site URL Properties Feed ▾

[Top](#) > [Shared Content](#)

\*Title:

\*Source:       Inactive Date:

\*Summary:

Checked Out: 07/28/09 1:05PM      Checked Out By: [Vice President of Finance](#)

**Web Site URL**

[Preview](#)

URL:

Approver:

Version: 1      Version Status: In Draft

Created: 07/28/2009 1:05PM      Created By: [Vice President of Finance](#)

▾ Tags

[Locations](#)   [Versions](#)   [Notifications](#)   [Comments](#)    [Search Content](#)

[Return to Browse Managed Content](#)

Web Site URL Properties page with the Web Site URL option selected in the Browse Managed Content - Add Content page

**URL**                      Enter any HTTP-accessible URL as the new content URL for the managed content folder.

---

## Managing Versions

This section provides an overview of the Managed Content approval process and discusses how to:

- Edit and view managed content.
- Check in content items.
- Check out content items.
- Review content versions.
- Submit content items for approval.
- Approve content items.
- Select content locations.
- Start and view discussions.
- Create and use tags in Managed Content.

- Manage Managed Content items by status.

## Understanding the Managed Content Approval Process

Managed content enables users to share content among users. It offers a check-in and check-out function, version controls, and an approval process to safeguard and manage the quality of content that is made available for publishing to a wider audience.

To approve content for publishing:

1. Add new content.

Select locations and verify folder membership.

2. Check content in.

Other authorized folder members can now check out and review or edit the content.

3. Submit completed content for approval.

4. Approve content.

## Pages Used to Manage Content Versions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Content Properties	EPPCM_CONT_MAIN	Content Management, Managed Content, Browse Folders  Click the Properties link on the Browse Managed Content or the My Managed Content page.	Modify content properties, such as content location, content approver, and content version; check content out, check it in, and submit it for approval; and maintain comments or discussions specific to that piece of content, and other functions.
My Managed Content - Check Out	EPPCM_USER_MAIN	<ul style="list-style-type: none"> <li>• Content Management, Managed Content, Browse Folders</li> </ul> <p>My Content, My Managed Content</p> <ul style="list-style-type: none"> <li>• Click the Check Out link on the Browse Managed Content or My Managed Content page.</li> </ul>	Edit and view all content that was checked out by you.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Browse Managed Content	EPPCM_HIERTOP_MAIN	Content Management, Managed Content, Browse Folders  Click a title link.	Edit and view all content that was checked out by you.
Content Versions	EPPCM_CONT_VER	Content Management, Managed Content, Browse Folders  Click the Properties link on the Browse Managed Content or My Managed Content page.  Click the Versions link on the Content Properties page.	Review, delete, or check out different versions for a specific content item.
Content Locations	EPPCM_CONT_LOC	Content Management, Managed Content, Browse Folders  Click a folder title link and click a subfolder title link.  Click an appropriate Properties link and click the Locations link on the Content Properties page.	View information about the folders in which the content is published. From this page, you can move content to a new folder on the Move Content page. In addition, from this page, you can specify additional folders in which the content is available on the Add Content Locations page. Specifying an additional location does not create another copy of the content; instead, it creates a link so that only one instance of the content is present within managed content.
Add Content Locations	EPPCM_CONT_TREEADD	Content Management, Managed Content, Browse Folders  Click a folder title link and click a subfolder title link.  Click an appropriate Properties link and click the Locations link on the Content Properties page.  Click the Add Location button on the Content Locations page.	Select an additional location for the content.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Start Discussion Confirmation	EO_PE_YESNOCONFIRM	Content Management, Managed Content, Browse Folders  Click a folder title link and click an appropriate Properties link.  Click the Start Discussion link on the Content Properties page.	Use to confirm the start of a discussion on this piece of content.
Post Details	EPPDF_VIEW_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link and click an appropriate Properties link.  Click the Start Discussion link on the Content Properties page.  Click the Yes-Save and Start button.	Use to start a new discussion, edit an existing discussion, or view an existing discussion for a content item.  From this page, you can edit the existing discussion, delete the discussion entirely, and add a reply, among other tasks.
Discussion	EPPDF_REPLY_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link and click an appropriate Properties link.  Click the Start Discussion link on the Content Properties page.  Click the Yes-Save and Start button and click the Edit button.	Enter or edit a discussion topic.
My Managed Content Status	EPPCM_STAT_MAIN	Content Management, Managed Content, My Content Status	View, at a glance, the work that you need to perform based on the status of managed content.
Content Notification	EPPCM_CONT_NTIFY	Click the Notifications link on the Content Properties page.	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Click the Comments link on the Content Properties page.	Enter additional comments about this content item.
Edit a Post	EPPDF_REPLY_TOPIC	Click the Edit button on the Post Details page.	Edit an existing discussion.

Page Name	Definition Name	Navigation	Usage
Add a Reply	EPPDF_REPLY_TOPIC	Click the Reply button on the Post Details page.	Respond to a discussion.

## Editing and Viewing Managed Content

Access the My Managed Content – Checked Out page (select My Content, My Managed Content; click the Check out link).

### My Managed Content

Review the current status of the content where you have authored, submitted, or updated the most recent version.

[Add Content](#) [Search Content](#)

Status:   Checked Out To Me  Search All Versions [Filter](#)

Content List							
ID	Title			Status	Version	Location Path	
1049	<a href="#">Documentation Tips</a>			Draft	4	Corporate Communications	<a href="#">Properties</a>
2004	<a href="#">Partners_CM</a>			Draft	1	Corporate Communications	<a href="#">Properties</a>
1699	<a href="#">Policies and Procedures</a>			Draft	1	Internal Controls Enforcer > Compliance Project 1 > US004 ILLINOIS OPERATIONS > Maintain customer master file	<a href="#">Properties</a>
1602	<a href="#">Process Map</a>			Draft	1	Internal Controls Enforcer > Compliance Project 1 > US003 CALIFORNIA OPERATIONS > Cash applications	<a href="#">Properties</a>
1606	<a href="#">Process Map</a>			Draft	1	Internal Controls Enforcer > Compliance Project 1 > US001 NEW YORK OPERATIONS > Consolidation	<a href="#">Properties</a>
1601	<a href="#">Process Map</a>			Draft	1	Internal Controls Enforcer > Compliance Project 1 > US001 NEW YORK OPERATIONS > Cash applications	<a href="#">Properties</a>
1607	<a href="#">Process Map</a>			Draft	1	Internal Controls Enforcer > Compliance Project 1 > US003 CALIFORNIA OPERATIONS > Consolidation	<a href="#">Properties</a>

My Managed Content - Checked Out page showing content items that are filtered by the Status and Checked Out To Me fields

When clicking a *Content Item Status* link on the My Managed Content Status page, you are redirected to the My Managed Content page with the filters set according to the status selected. These filters can be adjusted directly on the My Managed Content page. The content is automatically filtered to only return content rows where the user is the creator, updater, or approver of the last version.

Selecting the Search All Versions option filter will check all versions; however, data retrieval will take longer with this filter selected. The preceding example shows the My Managed Content page when the *Checked Out* content item status is selected.

---

**Note.** The newly added content item *How to Retrieve Secure Content* is listed as checked out and locked. You can also see that it is a Microsoft Word document, its latest version is 1, and it is located in two folders.

---

<b>Add Content</b>	Click to access the Add Content page, where you can add a new content to this section.
<b>Status</b>	Select to search articles with a status of <i>Draft, Pending, Published, Rejected, Rework</i> , or <i>All</i> .
<b>Checked Out to Me</b>	Select to limit your search to articles that were checked out to you.
<b>Search All Versions</b>	Select this option to check all versions of content; data retrieval will take longer with this filter selected.
<b>Filter</b>	Click to limit the number of articles displayed on the page based on the values entered for the Status and Checked Out to Me fields.
	Indicates content is in Microsoft Word format.
	Indicates content is a file attachment.
	Indicates content is an image attachment.
	Indicates content is in either text or html format.
<b>Title</b>	Click the content title link to view the content details.
	Indicates content is checked out and locked.
	Indicates content is published.
<b>Status</b>	Displays the current publishing status of this article: <i>Draft, Pending, Publish, Reject</i> , or <i>Rework</i> .
	<hr/> <b>Note.</b> You can use the Status drop-down list to search based on a selected status. <hr/>
<b>Version</b>	Displays the version number of the content.
<b>Location Path</b>	Displays the path to the content location.
	<hr/> <b>Note.</b> Content that is in multiple locations appears multiple times in the list. <hr/>
<b>Properties</b>	Click to access the content properties page, where you can specify the type of content you want to add to a section of a news publication.

## Checking In Content Items

Use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you check in a file attachment, you are prompted to upload it from a local drive and folder.

To check in a content item:

1. Access the My Managed Content page for a list of all content currently checked out to you.  
Select My Content, My Managed Content, Check Out.
2. Click the Properties link to access the Content Attachment Properties page.
3. Click the Check In button to unlock the content item and make it accessible to authorized folder members for review or edit.

Members can access the content using a variety of methods, including their own in-box or using browse.

---

**Note.** The Check In and the Cancel Check Out buttons disappear. The Check Out and the Submit For Approval buttons appear.

---

See [Chapter 3, "Accessing Content," page 65](#).

4. Return to the My Managed Content page.

The content item is no longer listed. You will need to change the filtering criteria to see it.

## Checking Out Content Items

Access the Browse Managed Content page (select Content Management, Manage Content, Browse Folders; click an appropriate folder title link).

The screenshot shows the 'Browse Managed Content' interface. At the top, there are buttons for 'Add Folder' and 'Add Content', and links for 'Properties' and 'Search Content'. Below these is a 'Filter By:' dropdown menu. The breadcrumb trail is 'Top > Public Statements'. A note indicates 'Contains content available for published to all users'. The main content is a table with columns: ID, Title, Status, Version, Modified, and Modified By. There are also 'Properties' and 'Delete' buttons for each row.

ID	Title	Status	Version	Modified	Modified By		
2004	<a href="#">How to Retrieve Secure Content</a>	Draft	1	02/09/09	VP1	<a href="#">Properties</a>	<a href="#">Delete</a>
1408	<a href="#">Privacy Statement</a>	Approved	1	01/28/03	VP1	<a href="#">Properties</a>	<a href="#">Delete</a>

Browse Managed Content page, Public Statements folder

Use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you check out a file attachment, you are prompted to save it to a local drive and folder.

If you navigate to the folder containing the required content, a lock is no longer associated with the file because the content is now checked in. Instead, a star icon indicates the content item was recently added.

---

**Note.** The My Managed Content page takes you directly to the content. To find your content using the browse option, you need to know where the content is located.

---

To check out content items:

1. Click the Properties link on the Browse Managed Content page.
2. Click the Check Out button on the Content Properties page.

The content item opens in its original format ready for you to review, edit, or save. For example, the *How to Retrieve Secure Content* item opens in Microsoft Word.

3. Save the content to a location on your computer.

The Content Properties page reappears. Notice the changes to the Version, Version Status, Created, and Modified fields. Checking out a piece of content creates a new version with a status of draft.

4. Return to the Browse Managed Content page.

Notice the icon indicating that this content is checked out and locked, and the version number has changed.

See [Chapter 4, "Setting Up and Working With Managed Content," Understanding Managed Content, page 81.](#)

## Reviewing Content Versions

Access the Content Versions page (select Content Management, Managed Content, Browse Folders; click the Properties link; and click the Versions link on the Content Properties page).

**Text or HTML Properties**

---

## Content Versions

Create additional versions by checking out the content. The most current approved version cannot be deleted.

Documentation Tips

Versions						Find	View All	First	1-3 of 3	Last
Version		Status	Comments							
3	<a href="#">Preview</a>	Approved	2004-12-19: Approved by VP1 2004-12-19: Submitted by VP1 2004-12-19: Checked In by VP1 2004-12-19: Checked Out Version 2 by VP1	<a href="#">Properties</a>	<a href="#">Check Out</a>					
2	<a href="#">Preview</a>	Approved	2004-12-19: Approved by VP1 2004-12-19: Submitted by VP1 2004-12-19: Checked In by VP1 2004-12-19: Checked Out Version 1 by VP1	<a href="#">Properties</a>	<a href="#">Check Out</a>	<a href="#">Delete</a>				
1	<a href="#">Preview</a>	Approved		<a href="#">Properties</a>	<a href="#">Check Out</a>	<a href="#">Delete</a>				

[Return](#)

### Content Versions page

Use this page to review, delete, or check out different versions of a specific content item. New versions can only be created by checking content out.

**Delete** This button is only available for content that has more than one version, and the version to be deleted is not the latest approved version.

**Check Out** This button is only available for content that is checked in.  
Click to check out content and create a copy of the specific version it is used.

## Submitting Content Items for Approval

You can select an approver at your discretion from the users who have been granted approval privileges for this folder. Before you can submit content items for approval, you must check in the content.

To submit content items for approval:

1. Select Content Management, Managed Content, Browse Folders.

Alternatively, select My Content, My Managed Content.

2. Access the Content Properties page.

Click the Properties link on the Browse Managed Content page or the My Managed Content page.

3. Select an approver user ID or role.

4. Click the Submit for Approval button.

Note the following:

- The content is automatically checked out and locked to the approver.
- The fields on the Content Properties page are only editable by the listed approver because the content is checked out to the approver.
- The Version Status and Locked To fields have been updated.

The icon also indicates that the file is locked. When you submit content for approval, it is automatically checked out to the approver by the system.

- The Check Out button and the Submit for Approval buttons disappear. The Cancel Check Out button appears.

See [Chapter 4, "Setting Up and Working With Managed Content," Understanding Managed Content, page 81.](#)

## Approving Content Items

The Content Attachment Properties page is used to modify content properties such as content location, content approver, and content version; to check content out, to check it in, and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other functions.

When you approve an item of managed content, you make that item available to be reused in other content management features such as news publications, categorized content, collaborative workspaces, and so on.

To approve a content item:

1. Select My Content, My Managed Content to access the My Managed Content page to view content items of a particular status, including a list of all content that requires your review and approval.
2. Click the Properties link for the desired content on the My Managed Content page.
3. Click the link to review the content.

For example, if the content is a file attachment, click the file name.

4. Click the Approve button if the content is ready to be published.

Click the Rework button if the content requires additional work.

Notice that the Modified and Version Status fields were updated and the locked icon was removed.

Approved content is now available for publishing.

## Selecting Content Locations

Access the Content Locations page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click a subfolder title link; click an appropriate Properties link and click the Locations link on the Content Properties page).

**Web Site URL Properties**

---

**Content Locations**

The content location (parent folder) determines the access to the content.

**Current Location:**  
 Top > Corporate Communications > Partners > [Partnership Overview](#)

Content Locations				Customize   Find   View All      First   1-2 of 2   Last
Feature	Publisher	Publish Status	Location Path	
Managed		Published	<a href="#">Top &gt; Corporate Communications &gt; Partners</a>	<input type="button" value="Move"/>
Pagelets	<input checked="" type="checkbox"/>	Published	Pagelet Wizard	

### Content Locations page

**Note.** The Content Locations page in the Managed Content feature lists all the folders where the content is located, including the locations of other publishing features that imported the managed content. When the Content Locations page is accessed from a nonmanaged feature, such as Workspaces or Categorized Content, it will only show the content locations for that feature. You can only move content between folders of the current feature in the current site.

When moving content or adding new content locations, be aware that the location (parent folder) determines the access security for the content.

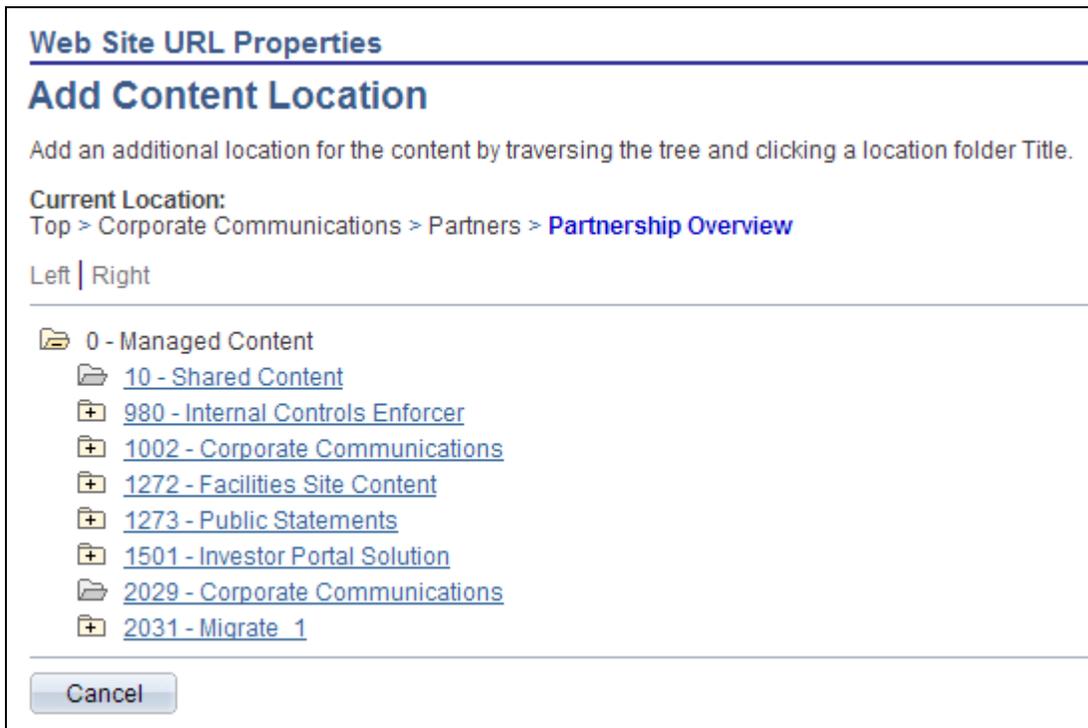
See [Chapter 4, "Setting Up and Working With Managed Content," Moving Folders in Managed Content, page 94.](#)

**Move**                                      Click to change the current location of the content.

**Add Location**                              Click to add an additional location for the content.

### **Choosing Additional Locations**

Access the Add Content Location page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click a subfolder title link; click an appropriate Properties link, click the Locations link on the Content Properties page; and click the Add Location button on the Content Locations page).



### Add Content Location page

To select an additional location for the content:

1. Click the folder icons to navigate through the hierarchies.
2. Select the new location by clicking the folder title.

The Content Locations page appears with the new location listed.

3. Click the Return button to return to the Content Properties page.
4. Click the Save button.

The document is now listed in two folders.

## Starting and Viewing Discussions

The Start Discussions link on the Content Properties page enables users to start a discussion, which is then attached to the content item. After a discussion has been started, the link changes to View Discussions and is used to edit, respond to, and view discussions.

---

**Note.** These discussions stay with the content item, and they can only be accessed from the Content Properties page.

---

## Starting Discussion

Access the Start Discussion Confirmation page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click an appropriate Properties link; click the Start Discussion link on the Content Properties page).

Start Discussion Confirmation page

Use the Start Discussion Confirmation page to confirm the start of a discussion on this piece of content.

## Posting and Viewing Details

Access the Post Details page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click an appropriate Properties link; click the Start Discussion link on the Content Properties page and click the Yes-Save and Start button).

Post Details page

Use the Post Details page to start a new discussion, edit an existing discussion, or view an existing discussion about a content item.

From the Post Details page, you can edit the existing discussion, delete the discussion entirely, and add a reply, among other tasks. Unlike discussion forums, a discussion for a content item contains only one topic, but it can contain one or more replies.

Notice that the title for the topic is the same as the title for the piece of content being discussed.

## Discussion

Access the Discussion page (select Content Management, Managed Content, Browse Folders; click a folder title link, and click an appropriate Properties link; click the Start Discussion link on the Content Properties page and click the Yes-Save and Start button; click the Edit button).

The screenshot shows a web-based discussion editor. At the top, the title is 'Privacy Statement'. Below the title is a rich text editor toolbar with icons for copy, paste, print, list, and font settings. The main area is a large empty text box. At the bottom are 'Save' and 'Cancel' buttons.

Discussion page

Use the Discussion page to edit a discussion topic. A discussion for a content item contains only one topic, but it can contain one or more replies.

After you post a discussion, click the Content Properties link; the Start Discussion link is now a View Discussions link.

## Creating and Using Tags for Content Management

Tags for Content Management appear on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window without using the application view page. In these instances, tags are only available on the properties page. Application pages appear only in edit or view mode.

To create and use tags for Content Management:

1. Access the pages either by:
  - Selecting Content Management, Managed Content, Browse Folder.
  - Selecting My Content, My Managed Content.
2. Select any content item.
3. Click an appropriate link to view, edit, or add tag.
4. Enter the tag name, and click the Update Tags button.

---

**Note.** Security considerations: Users that have access to the content must have the add and view tag permissions. Users that are assigned the Administrator, Author, or Expert roles also are assigned the modify permissions. All users have access to delete their own tags, both public and private. User with Admin privileges can delete all tags in the content, and an Admin user cannot delete the Private tags of other users.

---

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Tags."

## Managing Managed Content Items by Status

Access the My Managed Content Status page (select Content Management, Managed Content, My Content Status).

My Managed Content Status		
Review the content items that require your attention. Click the Content Item Status to review content with that status.		
Content Status		
Content Item Status	Status Description	Total Items
<a href="#">Checked Out</a>	Items you have checked out and locked	17
<a href="#">Draft Content</a>	Items in progress	101
<a href="#">Submitted Content</a>	Items you have submitted for approval	0
<a href="#">Requires Rework</a>	Items the approver sent back for rework	0
<a href="#">Review as Approver</a>	Items submitted to you to review for approval	0

My Managed Content Status page

The My Managed Content Status page and the My Managed Content page enable you to see, at a glance, the work that you need to perform based on the status of managed content.

**Content Item Status** Click an appropriate link to access the My Managed Content page, where you can preview the content items for the selected status, view their property details, or add new content.

---

**Note.** Enterprise Portal provides a My Managed Content homepage pagelet that gives you easy access to the content items that require your attention.

---

## Working With the My Managed Content Pagelet

This section provides an overview of the My Managed Content pagelet and discusses how to:

- Personalize the My Managed Content pagelet.
- Add a Folder Favorite.

## Understanding the My Managed Content Pagelet

Access the My Managed Content pagelet (click the Content link from the menu bar on the homepage and then select the My Managed Content option on the Personalize Content page).



My Managed Content pagelet

The My Managed Content pagelet provides an alternative access path to the My Managed Content page and to the Browse Managed Content page for a specific folder.

### Content Status

Select one of the links under Content Status to access the My Managed Content page with content filtered by your selection.

- *Checked Out:* Includes content items that you have checked out.
- *Draft Content:* Includes all draft content that has not been submitted.
- *Submitted Content:* Includes content that you have submitted for approval but is not yet approved.
- *Requires Rework:* Includes content items that are returned to you from an approver who has requested you to rework the content.
- *Review as Approver:* Includes content items that are submitted to you for approval.

Click a content status link to access the My Managed Content page, where you can access the content item in the selected status.

The number adjacent to the content status link indicates the number of content items at that status.

## Folder Favorites

Lists the Managed Content folders that you have added to the pagelet.

Select a link under the Folder Favorites section to access the Browse Managed Content page for that folder. Add folders that are most important to you, or which you access frequently, or modify them as your needs change.

---

**Note.** Add or delete folders by personalizing the pagelet.

---



The star icon indicates that new content has been added to the folder.

## Pages Used to Work With the My Managed Content Pagelet

Page Name	Definition Name	Navigation	Usage
Personalize My Managed Content	EPPCM_FAV_PREF	Click the Customize icon on the My Managed Content pagelet.	Modify the favorite folders that appear in the My Managed Content pagelet.
Add Folder Favorite	EPPCM_FAV_TREEADD	Click the Customize icon on the My Managed Content pagelet.  Click the Add Folder button on the Personalize My Managed Content page.	Select a folder to add as a favorite for the My Managed Content pagelet.

## Personalizing the My Managed Content Pagelet

Access the Personalize My Managed Content page (click the Customize icon on the My Managed Content pagelet).

### Personalize My Managed Content

Folder Favorites
Customize | Find | | | 
First 1-3 of 3 Last

Order	Nickname	Folder Title	Folder Path		
<input type="checkbox"/>	<input type="text" value="Partners"/>	Partners	Managed Content > Corporate Communications	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	<input type="text" value="Products"/>	Products	Managed Content > Corporate Communications	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	<input type="text" value="Data Transform"/>	PSFT_PA_MIG111	Managed Content > Shared Content	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

[Return to Home](#)

Personalize My Managed Content page

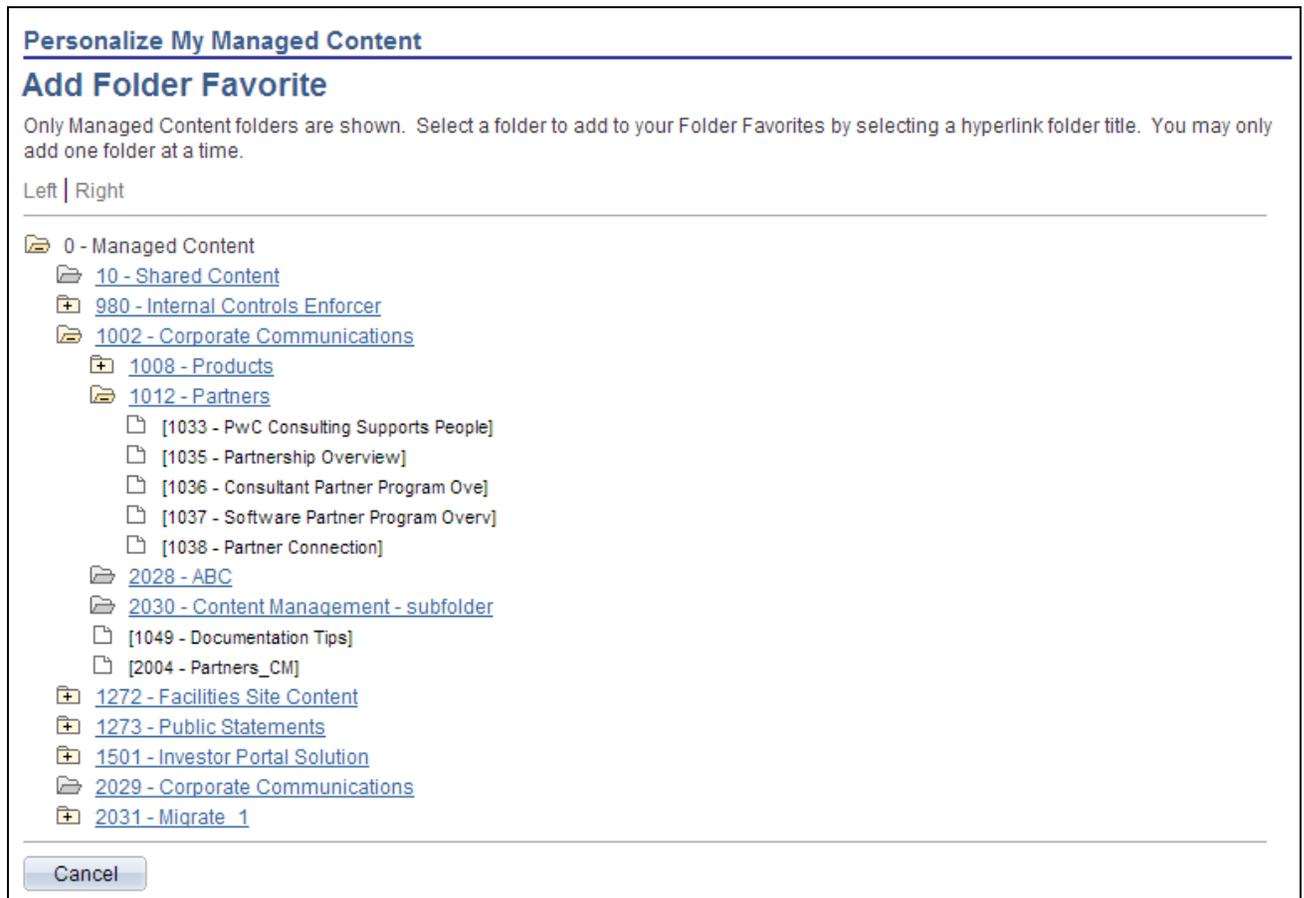
Use the Personalize Content page to select the pagelets that you want to appear on your homepage. Optionally, you can personalize the name of your homepage tab and add a welcome message.

You can add managed content folders to which you have access. The memberships and privileges assigned in Content Management apply.

<b>Order</b>	Specify the order in which the folders will appear on the pagelet. Complete the list of folders that you want to display before specifying their display order.
<b>Nickname</b>	Specify the name of the link that will appear on the pagelet. If no name is specified, the managed content folder name appears.
<b>Title</b>	Displays the managed content folder name.
<b>Path</b>	Displays the path to the selected folder from the managed content root. The path matches the folder hierarchy represented in the tree on the Add Folder Favorites page.
<b>Edit</b>	Click to access the Add Folder Favorites page, where you can select a different managed content folder. When you return to the Personalize My Managed Content page, edit the folder order and nickname values, if needed.
<b>Delete</b>	Click to delete the folder. You will be prompted to confirm your deletion.
<b>Add Folder</b>	Click to access the Add Folder Favorites page, where you can select a managed content folder that you want to add to the pagelet.

## Adding a Folder Favorite

Access the Add Folder Favorite page (click the Customize icon on the My Managed Content pagelet, and then click the Add Folder button on the Personalize My Managed Content page).



### Add Folder Favorite page

Expand each managed content folder to display additional subfolders, if any. Select a folder to add it to your folder favorites.

The selected folder will be added to the list of folder favorites on the Personalize My Managed Content page.

The system displays only the folders for which you have viewing privileges.

## Importing Managed Content into Other Features

This section discusses how to import Managed Content.

Using the Add Content page (EPPCM\_PUB\_SELECT), you can import Managed Content into these publishing features:

- News Publication
- Categorized Content
- Content Pagelets
- Manage Navigation

- Discussion Forums
- Action Items
- Community Calendar Events

To import managed content:

1. Browse folders to navigate to the folder where you want to import the managed content.

For example, select Content Management, Categorized Content, Browse Folders.

2. Click the Add Content button.

The Add Content page appears, enabling you to specify the type of content that you want to import to a published feature folder.

3. Select the *Managed Content* option as the content type, and then click the OK button.

The Managed Content search page appears.

---

**Note.** The Select Managed Content page appears when you use the Action Items. Other features use a common search page to select Managed Content to import.

---

4. Enter search criteria to filter the search results.
5. Click the Search button.
6. Select the content item that you want to import by clicking the content title.

The Content Properties page appears with the content item's information. The origin type displays as *Managed Content*.

7. Use the Content Properties page to review content properties such as title, source, and summary; to specify content location; to submit content for publication; and to maintain comments or discussions specific to that piece of content, among other functions.
8. Click the Submit button to save your work and submit the content for publication.

The new content appears in the folder with a status of pending publication. The modified date indicates when the content was approved in the Managed Content feature.

## Chapter 5

# Setting Up and Working with Categorized Content

This chapter provides an overview of categorized content and discusses how to:

- Manage folders.
- Add categorized content manually.
- Managing categorized content.

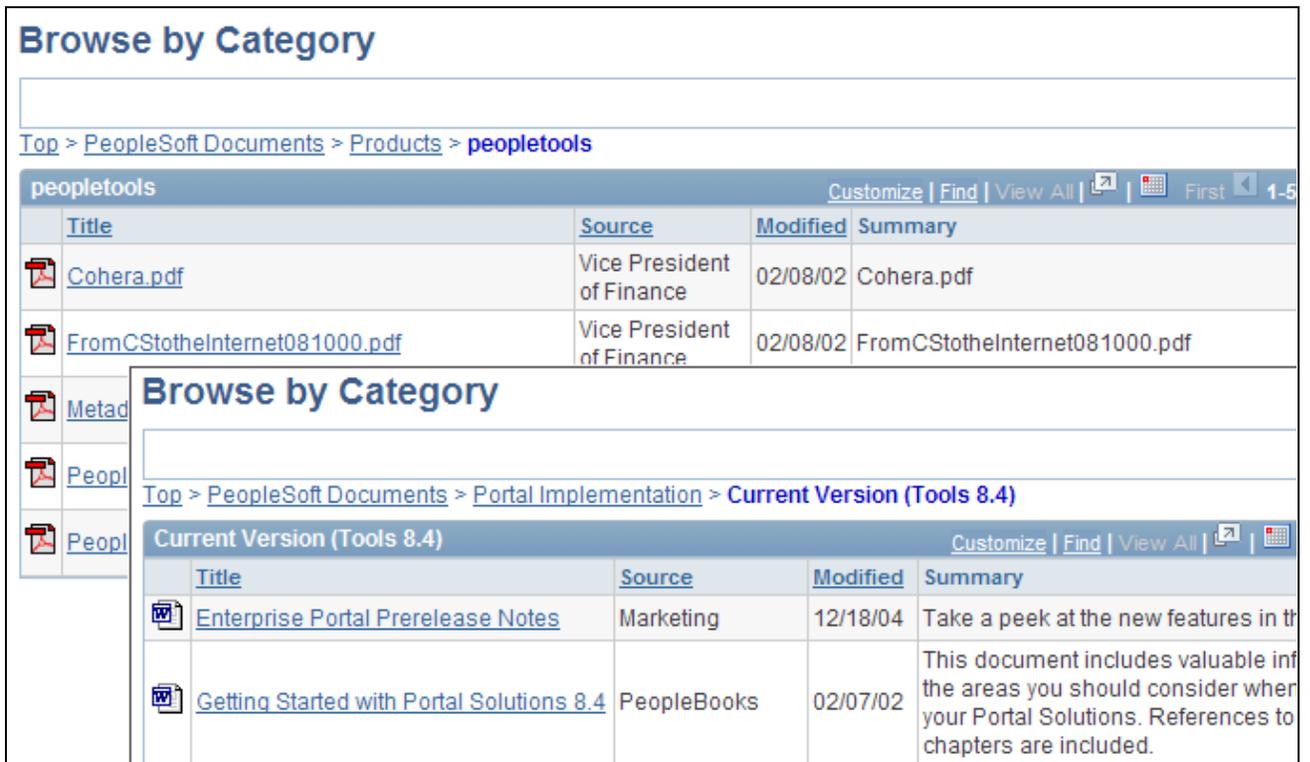
---

## Understanding Categorized Content

The Categorized Content feature of the content management system enables you to categorize data originating from many sources. You can incorporate content from file servers and web servers together with manually added entries and place them in the categorized content hierarchy. Users then search this folder hierarchy to locate relevant documents. By granting access to the folders, you control which users, by user ID or role, can edit, publish, and view data.

Folder administrators and content authors can populate the hierarchy manually. But, you can also import content in bulk. Using the content categorization spider that crawls through collections of documents on file servers and websites, you can automatically update your portal with the information that you consider pertinent. You control the crawler, telling it what type of content to retrieve, where to look, and how much information to recall. Using Process Scheduler to refresh folders, you can keep your information current by the day, or even hour.

The following figure shows the Browse by Category page plus an inset of another Browse by Category page with categorized content incorporated from several sources including the content from Marketing and PeopleBooks:



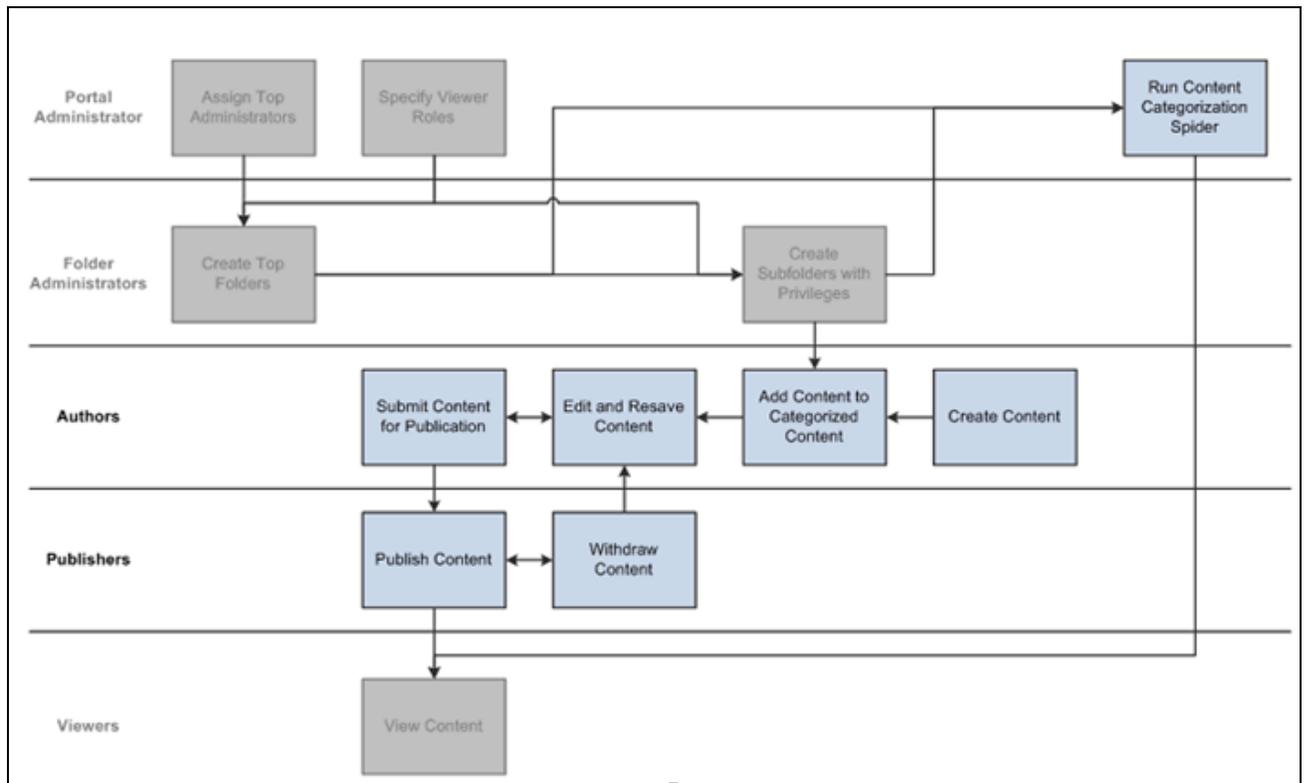
Browse by Category page with an inset of another Browse by Category page

### Creating Categorized Content

You can create categorized content in two ways: manually and automatically with the content categorization spider. The manual method consists of these high-level steps:

1. Create top folders and subfolders in the categorized content feature (folder administrators).
2. Assign members with specific privileges for the folders.  
 Also, assign viewer roles for viewing published content in these folders (folder administrators).
3. Create and save content in these folders (authors).
4. Submit content for publication (authors).
5. Review submitted content and publish individual content items (publishers).
6. Browse by category to retrieve published categorized content (viewers).

The following diagram highlights these steps for creating and publishing categorized content:



Steps for creating and publishing categorized content

## Managing Folders

This section discusses how to:

- Maintain folder properties for categorized content.
- Update folder security for categorized content.
- Assign member privileges.
- Move folders.
- Publish categorized content folders.
- Select folder data sources.

## Pages Used to Manage Folders

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Categorized Content	EPPCM_HIERTOP_MAIN	Content Management, Categorized Content, Browse Folders  Click the Add Top Folder button on the Browse Categorized Content page.  Click the Properties link for the folder you want to access on the Browse Categorized Content page.	Create hierarchies for classification and navigation.
Folder Properties	EPPCM_CATG_MAIN	Content Management, Categorized Content, Browse Folders  Click the Add Top Folder button, and click the Properties link for the folder that you want to access on the Browse Categorized Content page.	Set the properties for a new folder or to update property details for an existing folder.  <b>Note.</b> The Folder Properties page is used for top folders as well as for subfolders.
Top Folder Properties - Advanced Feed Options	EPPCM_FEED_ADVOPT	Content Management, Categorized Content, Browse Folders  Click the Add Top Folder button, and click the Publish as Feed link.  Click the Edit or Add Feed button.  Click the Advanced Option link.	Set up advanced options to publish a folder in the content management system so that it is accessible as a feed.  <b>Note.</b> The Publish as Feed link is available on all folder properties pages if the folder can be published and you have permissions to publish the folder.
Move Content	EPPCM_CONT_TREEMOD	Content Management, Categorized Content, Browse Folders  Click a content Properties link for the content that you want to move.  Click the Locations link on the Content Properties page, and click the Move button on the Content Locations page.	Move content to a new folder.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Folder Security	EPPCM_CATG_MEM	<p>Content Management, Categorized Content, Browse Folders</p> <p>Click the Add Top Folder button, and click the Properties link.</p> <p>Select the Folder Security tab on the Folder Properties page.</p>	<p>Add the administrators who can edit this folder and the users who can view the folder and its content.</p> <p><b>Note.</b> This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.</p>
Folder Security - Set Members Privileges	EPPCM_CATG_PRIV	<p>Content Management, Categorized Content, Browse Folders</p> <p>Click the Add Top Folder button, and click the Properties link.</p> <p>Select the Folder Security tab on the Folder Properties page.</p> <p>Click the Add Member button or the Edit button on the Folder Security page.</p>	<p>Assign privilege sets to the selected member.</p>
Folder Properties - Move Folder	EPPCM_CATG_TREEMOD	<p>Content Management, Categorized Content, Browse Folders</p> <p>Click the Add Top Folder button, and click the Properties link.</p> <p>Click the Move Folder link on the Folder Properties page.</p>	<p>Change the location of a subfolder. If the user performing the move is a top administrator, a subfolder can also be promoted to be a top folder for the content management feature.</p>
Content Source	EPPCM_CATG_SPIDR	<p>Content Management, Categorized Content, Browse Folders</p> <p>Click the Add Top Folder button, and click the Properties link.</p> <p>Click the Content Source tab on the Folder Properties page.</p>	<p>Select folder data sources.</p> <p><b>Note.</b> Information on this page is required only if you are going to use the categorization spider to automatically create folders and add content.</p> <p>See <a href="#">Chapter 6, "Running the Content Categorization Spider," Associating a Content Source with a Folder, page 186.</a></p>

## Maintaining Folder Properties for Categorized Content

Access the Folder Properties page (select Content Management, Categorized Content, Browse Folders; click the Properties link).

Folder Properties
Folder Security
Content Source

Define the folder properties and details. Child content created from this folder uses the specified child default values.  
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\*Title:

Summary:

Owner:  [Vice President of Finance](#)

Folder can be Published  
 Do Not Allow Deletes  
 Auto Generated Folder

Folder ID: 1203      Feature: Categorized Content  
 Modified: 02/08/2002 5:37PM      Modified By: [Vice President of Finance](#)

▼ Child Content Defaults

\*File Storage:  Documents in Database

\*Date Type:  ▼

\*Publish Date:  ▼

\*Expire Date:  ▼

\*Inactive Date:  ▼

[Return to Browse Categorized Content](#)     
 [Publish as Pagelet](#)   
 [Publish as Menu Item](#)   
 [Publish as Feed](#)   
 [Move Folder](#)

### Folder Properties page

Users can add folders or update properties at any level for which they have authorization. Only top administrators can create top folders at the root of a feature's folder hierarchy. At subsequent levels, any folder members with the proper privilege can add folders or update properties.

**Summary**      Add a brief description of the content. This field supports HTML entries.

**Owner**      Assign the owner of the folder.

Click the name link of the owner to access the Instant Message page, where you can send an instant message to the owner.

**Folder can be Published**      Select to allow for publishing of this folder as a pagelet or menu item.

Even with this option selected, only users with the Publish Folder or Unpublish Folder privilege will see the Publish as Pagelet, Publish as Feed, and Publish as Menu Item links.

**Do Not Allow Deletes** Select to prevent this folder from being deleted from the folder hierarchy or from being deleted during the purge process.

**Auto Generated Folder** Indicates whether this folder was created manually or by the spider process.

**Publish as Pagelet** Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the PeopleSoft Content Management system as a pagelet.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Pagelet, page 97.](#)

**Publish as Menu Item** Click to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it's accessible as a link in the left navigation menu.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Menu Item, page 95.](#)

**Publish as Feed** Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Feed, page 96.](#)

**Move Folder** Click to access the Top Folder Properties - Move Folder page, where you can change the location of this folder.

See [Chapter 4, "Setting Up and Working With Managed Content," Moving Folders in Managed Content, page 94.](#)

### ***Child Content Defaults***

Child content created from this folder uses the default values specified here.

**File Storage** Select the storage locations for any content that is attached files.

Available locations are based on those defined on the Define File Storage page.

See [Chapter 2, "Setting Up the Content Management System," Defining Document Storage Locations, page 21.](#)

<b>Date Type</b>	Select either <i>Relative Date</i> or <i>Absolute Date</i> to define content default publish and expiration dates for this folder.
<b>Publish Date</b>	Select the publish date for the default values of the content in this folder.
<b>Expire Date</b>	Select the expiration date for the default values of the content in this folder.
<b>Inactive Date</b>	Select different periods of time as dates when the content will become inactive. You can also select the option to not inactivate the content. Available options are: <ul style="list-style-type: none"><li>• <i>Current Date</i></li><li>• <i>Current Date + 1 Week</i></li><li>• <i>Current date + 30 Days</i></li><li>• <i>Current Date + 90 Days</i></li><li>• <i>Current Date + 365 Days</i></li><li>• <i>Current Date +999 days</i></li><li>• <i>Never Archive</i></li></ul>

## Updating Folder Security for Categorized Content

Access the Folder Security page (select Content Management, Categorized Content, Browse Folders; click the Properties link; select the Folder Security tab on the Folder Properties page).

Folder Properties
Folder Security
Content Source

Specify the Members, Privileges and Viewers. A Privilege specifies the actions a user can perform upon the folder and the content located in that folder.

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Member Privileges
Customize | Find | View All | | First 1 of 1 Last

Member Type	Member Name	Privilege Sets		
Role	PAPP_CONTCATG_ADMIN	Administrator	Edit	Delete

Add Member
Inherit Members

Viewer Roles
Customize | Find | View All | | First 1-4 of 4 Last

Role Name	Description	Delete
PAPP_CUSTOMER	Portal Customer	Delete
PAPP_EMPLOYEE	Portal Employee	Delete
PAPP_SUPPLIER	Portal Supplier	Delete
PAPP_USER	Enterprise Portal User	Delete

Add Viewer
Inherit Viewers

Cascade Viewer Roles to Child Folders on Save

Save

[Return to Browse Categorized Content](#)

### Folder Security page

A new folder automatically inherits the members and privileges of its parent folder. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an Inherit Members button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

The Folder Security page is also used to manage the audiences allowed to view the published content of categorized content folders. These viewing audiences are similar to the viewer roles defined on the Viewer Roles page. Within categorized content, the folder administrator should try to choose among the same limited set of roles.

---

**Note.** A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member a folder.

---

<b>Member Privileges</b>	<p>Displays type, name, and privilege sets for the members of the folder.</p> <p>Privileges specify the actions that a member can perform on the folder and the content contained in this folder.</p> <hr/> <p><b>Note.</b> A viewer member privilege defined in the Member Privileges section of the page is not equivalent to a viewer role defined in the Viewer Roles section of the page, even if the same role ID is used. In the case of the former, a viewer member privilege allows that member to view the folder and all of its contents (in draft, pending, or published states) through the folder hierarchy. The latter allows users with that role to view published content only and only through the Browse by Category page.</p> <hr/>
<b>Edit</b>	Click to edit privileges of this member.
<b>Delete</b>	Click to remove the member and prohibit him or her from accessing content from this folder.
<b>Add Member</b>	<p>Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions that they can perform on the folder and the content located in that folder.</p> <p>See <a href="#">Chapter 5, "Setting Up and Working with Categorized Content," Assigning Member Privileges, page 161.</a></p>
<b>Inherit Members</b>	Click to inherit members from the parent folder.
<b>Viewer Roles</b>	<p>Displays name and description for viewer roles. The viewer roles:</p> <ul style="list-style-type: none"> <li>• Determine the security for viewing the published categorized content within this folder from the Browse by Category page or the hierarchy viewer pages when the folder is published as a menu item or published as a pagelet.</li> <li>• Determine the search results of the categorized content when the viewer is using the search in the portal header.</li> <li>• Have no bearing on securing the folders within management of the Categorized Content feature.</li> </ul> <hr/> <p><b>Note.</b> When you are publishing folders with security roles, folders are published based on your defined viewer roles rather than member privileges.</p> <hr/>
<b>Add Viewer</b>	Click to add another row and select a user role to add to the list.
<b>Inherit Viewers</b>	Click to add viewers from the parent folder.

**Cascade Viewer Roles to Child Folder on Save** Select to add these roles to all child folders that you have access to when you save this folder.

**Note.** If this process encounters a child folder that you do not have privileges for, the cascading of viewer roles stops at that folder and does not continue to the child folders that follow. Changes to viewer roles can be cascaded to subfolders; however, changes to member privileges must be updated in the subfolders manually.

## Assigning Member Privileges

Access the Folder Security - Set Members Privileges page (select Content Management, Categorized Content, Browse Folders; click the Properties link; click the Folder Security tab; click the Add Member button or the Edit button on the Folder Security page).

**Folder Security**

**Set Members Privileges**

Select members and their privilege security.

Members	
*Member Type	*Member Name
Role <span style="float: right;">▼</span>	PAPP_AUTHOR <span style="float: right;">🔍</span>

Member Privileges		
	Privilege Set	Privileges
<input type="checkbox"/>	Administrator	Add Folder Edit Folder Delete Folder Publish Folder Unpublish Folder Assign Members Add Content Edit Content Edit Content Metadata Delete Content Delete Approved Content Publish Content Release Locked Content View Content Discussions Add Content Discussions Moderate Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/>	Viewer	View Content Discussions Subscribe to Content View Content and Folder

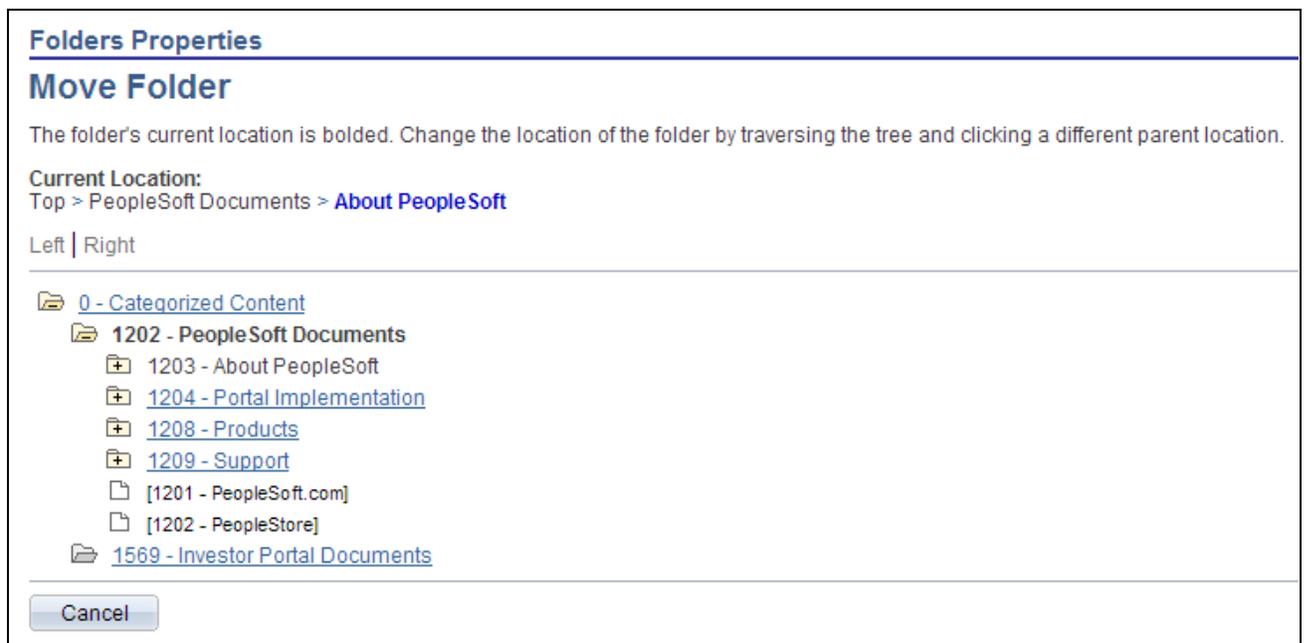
Folder Security - Set Members Privileges page: Categorized Content

<b>Member Type</b>	Select a membership type of <i>User</i> or <i>Role</i> .
<b>Member Name</b>	Select a member name.
<b>Privilege Set</b>	Assign privileges to this member by selecting privilege sets.
<hr/>	
<b>Note.</b> The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Categorized Content feature.	
<hr/>	

See [Chapter 2, "Setting Up the Content Management System," Defining Privilege Sets, page 11.](#)

## Moving Folders

Access the Folder Properties - Move Folder page (select Content Management, Categorized Content, Browse Folders; click the Properties link; and click the Move Folder link).



Folder Properties - Move Folder page

Use this page to move a folder to a different parent folder. The folder in bold type represents the folder's current location. Only top administrators can move a folder to the top folder position. To do so, select the *0-Categorized Content* location. Auto-generated folders cannot be moved.

Navigate the tree by clicking the folders. Select a new location from the available values. These values are based on your privileges. You must have the *Delete Folder* privilege in the current location, as well as *Add Folder* privileges on the new parent location to move a folder.

## Publishing Categorized Content Folders

In the Folder Properties page (select Content Management, Categorized Content, Browse Folders; click the Properties link), the Folder can be Published option enables approved content to be imported and published in features outside of categorized content. You must select this option for publishing features to import or reference categorized content. In addition, the Folder can be Published option enables you to publish this folder as a pagelet, menu item, or feed.

---

**Note.** Even with the Folder can be Published option selected, only users with the Publish Folder or Unpublish Folder privilege will see the Publish as Pagelet, Publish as Menu Item, or Publish as Feed link.

---

### **Publish as Pagelet**

Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Pagelet, page 97.](#)

### **Publish as Menu Item**

Click to access the Publish as Menu Item page, where you can publish a folder in the content management system so that it's accessible as a link in the left navigation menu.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Menu Item, page 95.](#)

### **Publish as Feed**

Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed.

---

**Note.** This link is available only when the Folder can be Published option is selected.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Feed, page 96.](#)

## Selecting Folder Data Sources

Access the Content Source page (select Content Management, Categorized Content, Browse Folders; click the Add Top Folder button; click the Properties link; select the Content Source tab on the Folder Properties page).

Folder Properties Folder Security **Content Source**

Specify the crawled spider source that generates the child content and child folders in this parent folder.

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Spider Source Values		Find	First	1 of 1	Last
*Source Type:	File Server	<input checked="" type="checkbox"/>	Auto Expand Folder	+	-
*Source Name:	PeopleSoft Docs	Score:	0.00000	Sequence:	1
*Source Path:	/ps/images/portal_pa/website/about_PSFT				

[Save](#)

[Return to Browse Categorized Content](#)

Content Source page

---

**Note.** Values on this page are required only if you use the categorization spider to automatically create folders and add content.

---

See [Chapter 6, "Running the Content Categorization Spider,"](#) Associating a Content Source with a Folder, page 186.

---

## Adding Categorized Content Manually

This section provides an overview of adding categorized content and discusses how to add new categorized content.

### Understanding Adding Categorized Content

Using the Categorized Content navigation menu item [Browse Folders](#), you can navigate through the hierarchy and manually add folders and content. You can also edit the attributes of manually added folders and content, as well as add menu items and import managed content.

## Pages Used to Add Categorized Content Manually

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Categorized Content - Add Content	EPPCM_ADDCONT_SEC	Content Management, Content Categorization, Browse Folders  Click a title link in the Browse Categorized Content page, and click the Add Content button on the Content Properties page.	Specify the type of content that you want to add to a folder in categorized content.
Categorized Content Properties	EPPCM_CONT_MAIN	Click the Add Content button on the Browse Categorized Content page.  Select the type of content to add, and then click OK on the Add Content page.	Enter content properties such as title, summary, and content location; submit content for publication; and maintain comments or discussions specific to that piece of content, among other functions.  <b>Note.</b> The name of this page and its fields that appear depend on the content type that you selected on the Browse Categorized Content - Add Content page.
Content Locations	EPPCM_CONT_LOC	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Locations link on the Content Properties page.	Move content to a different folder or add content to multiple folders.
Add Content Locations	EPPCM_CONT_TREEADD	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Locations link on the Content Properties page.  Click the Add Location button on the Content Locations page.	Select new locations for the content.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Move Content	EPPCM_CONT_TREEMOD	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Locations link on the Content Properties page.  Click the Move button on the Content Locations page.	Move content to a different folder.
Content Notification	EPPCM_CONT_NTFY	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Notifications link on the Content Properties page.	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Comments link on the Content Properties page.	Enter any additional comments about this content item.
Post Details	EPPDF_VIEW_TOPIC	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Start Discussion link on the Content Properties page.  Click the Yes-Start Discussion button on the Start Discussion Confirmation page.	Start a new discussion or edit an existing discussion for this content item.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Edit a Post Add a Reply	EPPDF_REPLY_TOPIC	Content Management, Content Categorization, Browse Folders  Click the Add Content button on the Browse Categorized Content page.  Click the Start Discussion link, and click the Yes-Start Discussion button.  Click the Edit button or the Reply button on the Post Details page.	Edit an existing discussion or respond to a discussion.

## Adding New Categorized Content

Access the Browse Categorized Content - Add Content page (select Content Management, Content Categorization, Browse Folders; click an entry in the Title column, and click the Add Content button).

Browse Categorized Content - Add Content page

### Content Type

Select a content type. Available options are:

- *Menu Item*: Select portal registry content references.  
Menu Items are pages, websites, or files accessible from the navigation menu.
- *File Attachment*: Upload files into Content Management.
- *Text or HTML*: Use HTML or text to be rendered as HTML.
- *Image Attachment*: Upload an image file.
- *Image URL*: Upload a web-enabled image file URL.
- *Web Site URL*: Enter a web URL.
- *Managed Content*: Select existing managed content.

- OK** After you select a content type and click this button, a Categorized Content Properties page appears based on the content type you selected.
- When content is added to managed content, its status is set to checked out.

## Adding Categorized Content Attachments

Access the Categorized Content Properties page (select the type of content to add, and then click OK on the Browse Categorized Content page).

**Note.** The name that appears on this page depends on the content type that you selected on the Browse Categorized Content - Add Content page.

This example shows the Web Site URL Properties page with the Web Site URL option selected in the Browse Categorized Content - Add Content page:

Categorized Content - Web Site URL Properties page

- Menu Item** Use the search icon to select an approved menu item.
- Save as Draft** Click to save this content item in draft format.
- You can continue to edit the content property fields for this item. Content in draft status does not appear on the Browse by Category page because it is not published.
- Publish** Click to save and publish this content item.
- All fields become read-only. Published content appears on the Browse by Category page to users who have the viewer roles for the parent folder where the content is located.

<b>Unpublish</b>	Click to save the content and save it to Pending Publishing. Nonpublished content does not appear on the Browse by Category page.
<b>Locations</b>	Click to set the publish and expiration date for the content in this location and set the item to be published.
<b>Notifications</b>	Click to create a list of interested parties or send email notifications of saved content to the list of interested parties.
<b>Save</b>	Click to save the content item without changing the publish status.
<b>Submit</b>	Click to save and submit the content item for publishing.
<b>Comments</b>	Click to add additional comments about this content item.
<b>Search Content</b>	Click to search existing content within the Categorized Content feature.
<b>Start Discussions</b>	Click to begin a discussion topic. <hr/> <b>Note.</b> Discussion topics stay with the content item and cannot be accessed outside of the Content Properties page. <hr/>
<b>View Discussions</b>	This link is available if the discussion topic already exists for this content item. Click to view, edit, or enter a response to a discussion.

See [Chapter 4, "Setting Up and Working With Managed Content," Adding Content Attachments, page 124.](#)

## Translating Content Management HTML/Text Content

To translate Content Management HTML/Text content, you must translate the same content version into the various languages you want to display. This means that you must save the content version as a draft, and translate it for each appropriate language. Check in or submit the content version *after* it is translated for all appropriate languages.

If content is being translated into one or more foreign languages, perform the language translations on the content after the content is checked out. When all translations are completed, you can check content in.

---

**Note.** Content comments are not translated. You will see the comments from the language that you entered last.

---

## Managing Categorized Content

This section discusses how to:

- Edit and view categorized content.
- Submit content items for approval.

- Approve content items.
- Select content locations.
- Start and view discussions.
- Create and use tags.
- Manage categorized content items by status.

## Pages Used to Manage Categorized Content

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Categorized Content Status	EPPCM_STAT_MAIN	<ul style="list-style-type: none"> <li>• Content Management, Categorized Content, My Content Status</li> <li>• My Content, My Categorized Content</li> </ul>	View, at a glance, the work that you need to perform based on the status of categorized content.
My Categorized Content	EPPCM_USER_MAIN	<ul style="list-style-type: none"> <li>• Content Management, Categorized Content, My Content Status</li> </ul> <p>Click the Published Content link My Categorized Content page.</p> <ul style="list-style-type: none"> <li>• My Content, My Categorized Content</li> </ul> <p>Click the Published Content link My Categorized Content page.</p>	View and edit all of your categorized content.
Content Properties	EPPCM_CONT_MAIN	<p>Content Management, Managed Content, Browse Folders</p> <p>Click the Properties link on the Browse Managed Content or My Managed Content page.</p>	Manage the content.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Content Versions	EPPCM_CONT_VER	<p>Content Management, Managed Content, Browse Folders</p> <p>Click the Properties link on the Browse Managed Content or My Managed Content page.</p> <p>Click the Versions link on the Content Properties page.</p>	<p>Review, delete, or check out different versions for a specific content item.</p>
Content Locations	EPPCM_CONT_LOC	<p>Content Management, Managed Content, Browse Folders</p> <p>Click a folder title link, and click a subfolder title link.</p> <p>Click an appropriate Properties link, and click the Locations link on the Content Properties page.</p>	<p>View information about the folders in which the content is published.</p> <p>From this page, you can move content to a new folder on the Move Content page, and specify additional folders in which the content is available on the Add Content Locations page. Specifying an additional location does not create another copy of the content; instead, it creates a link so that only one instance of the content is present within managed content.</p>
Add Content Location	EPPCM_CONT_TREEADD	<p>Content Management, Managed Content, Browse Folders</p> <p>Click a folder title link, and click a subfolder title link.</p> <p>Click an appropriate Properties link, and click the Locations link on the Content Properties page.</p> <p>Click the Add Location button on the Content Locations page.</p>	<p>Select an additional location for the content.</p>
Start Discussion Confirmation	EO_PE_YESNOCONFIRM	<p>Content Management, Managed Content, Browse Folders</p> <p>Click a folder title link, and click an appropriate Properties link.</p> <p>Click the Start Discussion link on the Content Properties page.</p>	<p>Use to confirm the start of a discussion on this piece of content.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Post Details	EPPDF_VIEW_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link, and click an appropriate Properties link.  Click the Start Discussion link on the Content Properties page.  Click the Yes-Save and Start button.	Use to start a new discussion, edit an existing discussion, or view an existing discussion for a content item. From the Post Details page, you can edit the existing discussion, delete the discussion entirely, and add a reply, among other tasks.
Discussion	EPPDF_REPLY_TOPIC	Content Management, Managed Content, Browse Folders  Click a folder title link, and click an appropriate Properties link.  Click the Start Discussion link on the Content Properties page.  Click the Yes-Save and Start button, and click the Edit button.	Enter or edit a discussion topic.
Content Notification	EPPCM_CONT_NTIFY	Click the Notifications link on the Content Properties page.	Send email notifications of saved content to the list of interested parties.
Comments	EPPCM_CONTCOMM_SEC	Click the Comments link on the Content Properties page.	Enter any additional comments about this content item.
Edit a Post Add a Reply	EPPDF_REPLY_TOPIC	<ul style="list-style-type: none"> <li>Click the Edit button on the Post Details page.</li> <li>Click the Reply button on the Post Details page.</li> </ul>	Edit an existing discussion or respond to a discussion.

## Editing and Viewing Categorized Content

Access the My Categorized Content page: Published Content (select My Content, My Categorized Content, Published Content).

### My Categorized Content

Review the current status of the content you have authored or updated.

Add Content
Search Content

Status: Published Content
 Type: All
 Include Crawled Content
 Filter

ID	Title	Location Path	Status	Publish	
1227	<a href="#">portalSolutionsSP2Features.pdf</a>	PeopleSoft Documents > Portal Implementation > Former Versions (Tools 8.1x)	Published		<a href="#">Properties</a>
1224	<a href="#">business_persons_guide.pdf</a>	PeopleSoft Documents > Portal Implementation	Published		<a href="#">Properties</a>
1225	<a href="#">PortalTechnologyPS8_122000.pdf</a>	PeopleSoft Documents > Portal Implementation > Technology	Published		<a href="#">Properties</a>
1228	<a href="#">PortalSP2InstallDocumentation.zip</a>	PeopleSoft Documents > Portal Implementation > Former Versions (Tools 8.1x)	Published		<a href="#">Properties</a>
1044	<a href="#">Portal Solutions</a>	PeopleSoft Documents > Portal Implementation	Published		<a href="#">Properties</a>
1202	<a href="#">PeopleStore</a>	PeopleSoft Documents	Published		<a href="#">Properties</a>
1223	<a href="#">PeopleSoftCorporateChronology.doc</a>	PeopleSoft Documents > About PeopleSoft	Published		<a href="#">Properties</a>
1201	<a href="#">PeopleSoft.com</a>	PeopleSoft Documents	Published		<a href="#">Properties</a>
1050	<a href="#">PeopleSoft Internet Architecture</a>	PeopleSoft Documents > Portal Implementation > Technology	Published		<a href="#">Properties</a>
1226	<a href="#">EnterprisePortalsSP2ReleaseNotes.doc</a>	PeopleSoft Documents > Portal Implementation > Former Versions (Tools 8.1x)	Published		<a href="#">Properties</a>

My Categorized Content page: Published Content

Use this page to easily locate and review content items of a particular status. If necessary, you can enter additional search criteria to filter the results.

**Include Crawled Content**      Select to bring up all the auto-generated content that was generated by the current user if that user ran the categorization spider process. The amount of data can be quite large, so use this filter with caution.

**Title**      Click the title link to preview the item.

**Properties**      Click to view the property details.

## Submitting Content Items for Approval in Categorized Content

You can select an approver at your discretion from the users who have been granted approval privileges for this folder. Before you can submit content items for approval, you must check in the content.

To submit content items for approval:

1. Select Content Management, Categorized Content, Browse Folders, or Select My Content, My Managed Content.

2. Access the File Attachment Properties page.

Click the Properties link on the Browse Categorized Content page or the My Categorized Content page.

3. Select an approver user ID or role.
4. Click the Save button, and click the Check in buttons.
5. Click the Submit for Approval button.

Note that:

- The content is automatically checked out and locked to the approver.
- The fields on the Content Properties page are editable only by the listed approver because the content is checked out to the approver.
- The Version Status and Locked To fields have been updated.

The icon also indicates that the file is locked. When you submit content for approval, it is automatically checked out to the approver by the system.

- The Check Out and Submit for Approval buttons disappear. The Cancel Check Out button appears.

## Approving Content Items in Categorized Content

You use the Content Attachment Properties page to modify content properties such as content location, content approver, and content version; to check out and check in content and to submit it for approval; and to maintain comments or discussions specific to that piece of content, among other tasks.

When you approve an item of categorized content, you make that item available to be reused in other content management features such as News Publications, Managed Content, Collaborative Workspaces, and so on.

To approve a content item:

1. Select My Content, My Managed Content to access the My Managed Content page to view content items of a particular status, including a list of all content that requires your review and approval.
2. Click the Properties link for the desired content on the My Managed Content page.
3. Click the link to review the content.

For example, if the content is a file attachment, click the file name.

4. Click the Approve button if the content is ready to be published.

Click the Rework button if the content requires additional work.

Notice that the Modified and Version Status fields have been updated and the locked icon has been removed.

Approved content is now available for publishing.

## Selecting Content Locations in Categorized Content

Access the Content Locations page (Content Management, Categorized Content, Browse Folders; click a folder title link, and click a subfolder title link; click an appropriate Properties link, and click the Locations link on the Categorized Content Properties page).

**Web Site URL Properties**

---

**Content Locations**

The content location (parent folder) determines the access to the content.

**Current Location:**  
Top > PeopleSoft Documents > **People Store**

Content Locations					Customize   Find   View All      First   1 of 1   Last
Feature	Publish Status	Location Path	Publish Date	Expire Date	
Categorize	Published	<a href="#">Top &gt; PeopleSoft Documents</a>	<input type="text"/>	<input type="text"/>	<input type="button" value="Move"/>

Content Locations page

The Content Locations page in the Categorized Content feature lists all the folders where content is located. When the Content Locations page is accessed from a non-managed feature such as Workspaces or Categorized Content, it shows only the content locations for that feature. You can move content only between folders of the current feature in the current site.

---

**Note.** When moving content or adding new locations for the content, be aware that the location (parent folder) determines the access security for the content.

---

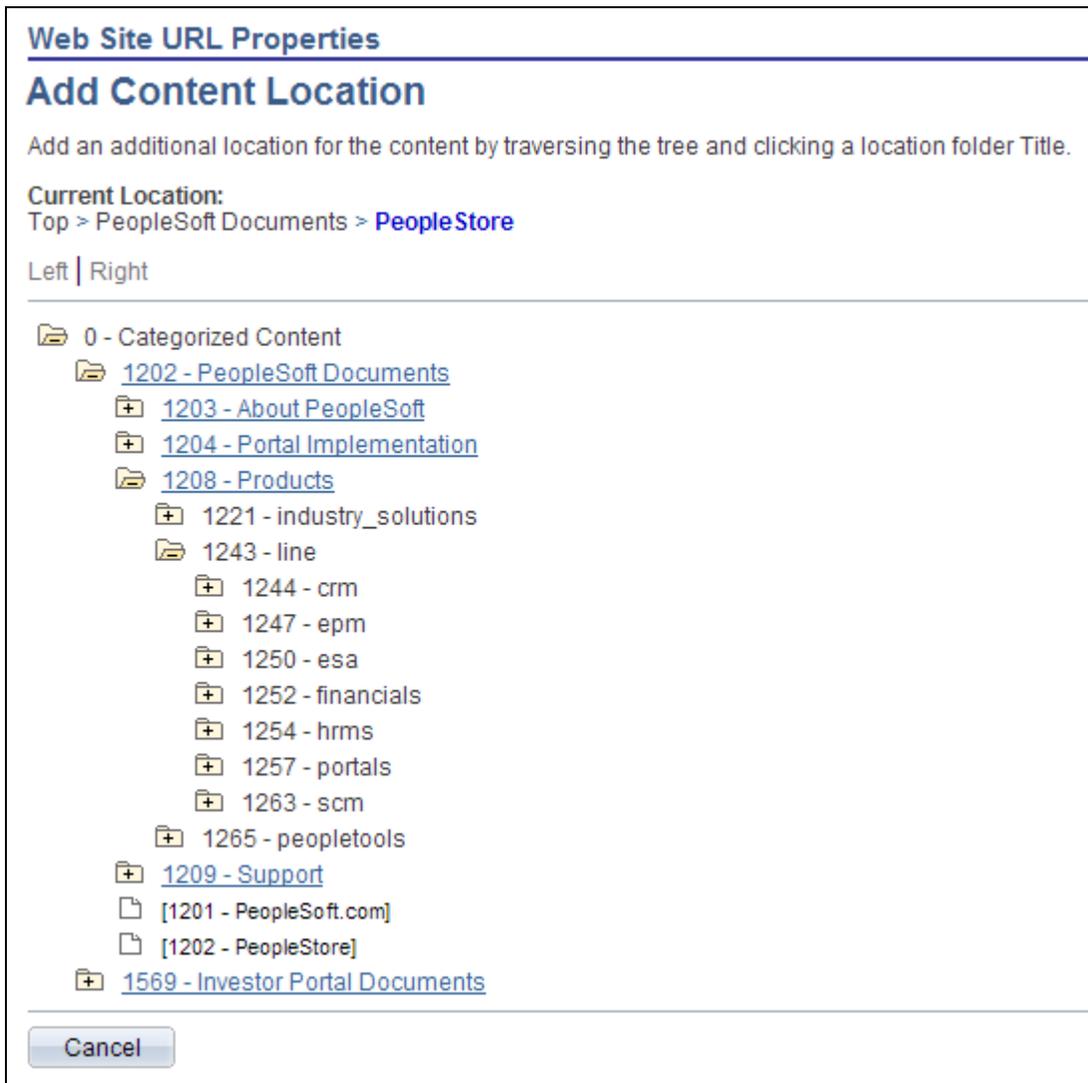
See [Chapter 4, "Setting Up and Working With Managed Content," Moving Folders in Managed Content, page 94.](#)

**Move**                                      Click to change the current location of the content.

**Add Location**                              Click to add an additional location for this content.

### ***Choosing Additional Locations***

Access the Add Content Location page (select Content Management, Categorized Content, Browse Folders; click a folder title link; click an appropriate Properties link and click the Locations link; click the Add Location button on the Content Locations page).



### Add Content Location page

To select an additional location for the content:

1. Click the folder icons to navigate through the hierarchies.
2. Select the new location by clicking the folder title.

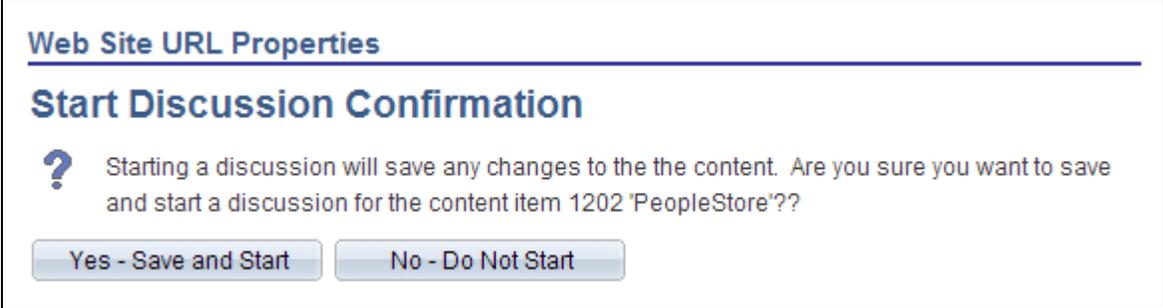
The Content Location page appears with the new location listed.

3. Click the Return button to return to the Content Properties page.
4. Click the Save button.

The document is now listed in two folders.

## Starting and Viewing Discussions in Categorized Content

Access the Start Discussion Confirmation page (select Content Management, Managed Content, Browse Folders; click a folder title link and click an appropriate Properties link; click the Start Discussion link on the Content Properties page).



**Web Site URL Properties**

---

### Start Discussion Confirmation

? Starting a discussion will save any changes to the the content. Are you sure you want to save and start a discussion for the content item 1202 'PeopleStore'??

Start Discussion Confirmation page

Use this page to start a discussion, which is then attached to the content item. After a discussion has been started, the link changes to View Discussions and is used it to edit, respond to, and view discussions.

---

**Note.** These discussions stay with the content item, and can be accessed only from the Categorized Content Properties page.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Starting and Viewing Discussions, page 142.](#)

## Creating and Using Tags in Categorized Content

Tags for categorized content are displayed on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window directly without using the application view page. In these instances, tags are available only on the properties page. Application pages can be displayed in only edit or view mode.

To create and use tags for categorized content:

1. Access the pages by using one of the following navigations:
  - a. Select Content Management, Categorized Content, Browse Folder.
  - b. Select My Content, My Categorized Content.
2. Select any content property link.
3. Click an appropriate link to view, edit, or add tags.
4. Enter the tag name, and click the Update Tags button.

---

**Note.** Security considerations: Users that have access to the content must have the add and view tag permissions. Users that are assigned the Administrator, Author, or Expert roles also are assigned the modify permissions. All users have access to delete their own tags, both public and private. User with Admin privileges can delete all tags in the content, and an Admin user cannot delete the Private tags of other users.

---

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Tags."

## Managing Categorized Content Items by Status

Access the My Categorized Content Status page (select Content Management, Categorized Content, My Content Status).

My Categorized Content Status		
Review the content items that require your attention. Click the Content Item Status to review content with that status.		
Content Status		
<a href="#">Content Item Status</a>	<a href="#">Status Description</a>	<a href="#">Total Items</a>
<a href="#">Draft Content</a>	Items in progress	0
<a href="#">Pending Publication</a>	Items you have submitted that are pending publication	1
<a href="#">Published Content</a>	Items that are currently published	13

My Categorized Content Status page

The My Categorized Content Status page enables you to see, at a glance, the work that you need to perform based on content status.

**Content Item Status** Click to access the My Categorized Content page, where you can preview the content items for the selected status, view their property details, or add new content.

See [Chapter 5, "Setting Up and Working with Categorized Content," Editing and Viewing Categorized Content, page 172.](#)

---

**Note.** The total item count does not include any content item that is located in an automatically generated folder, such as crawled content items.

---

## Chapter 6

# Running the Content Categorization Spider

This chapter provides an overview of the content categorization spider process and discusses how to:

- Set up to run the content categorization spider.
- Run the content categorization spider.
- Debug a run of the content categorization spider.
- Make categorized content available on other sites.
- Review delivered sample Categorized Content data.

---

## Understanding the Content Categorization Spider Process

In Oracle's PeopleSoft Enterprise Portal, the Categorized Content feature of the Content Management system enables you to categorize data originating from many sources. You can incorporate content from file servers and web servers together with manually added entries and place them in the categorized content hierarchy. Users then search this folder hierarchy to locate relevant documents. By granting access to the folders, you control which users—by user ID or role—can edit, publish, and view data.

Folder administrators and content authors can populate the hierarchy manually. But, you can also import content in bulk, using the content categorization spider, a web crawler program that will retrieve folders and documents from a local file server or from a remote website. You can automatically update your portal with the information that you consider pertinent, and retain the information where you deem necessary. You control the crawler, telling it what type of content to retrieve, where to look, and how much information to recall. Using Process Scheduler to refresh folders, you can keep your information current by the day, or even hour.

The features of automated categorization include:

- A document that can appear in multiple folders and hierarchies.

Thus, users can find documents via whichever navigation scheme is most intuitive for them.

- The ability to map documents from different sources or folders to the same folder.

Thus, users can aggregate related documents from a variety of sources.

- Folders that are mapped individually, so a hierarchy does not need to reflect the exact structure of the source server.

Thus, users can organize documents in the most logical fashion.

To invoke the spider, you schedule an Application Engine program. The Application Engine program passes parameters, such as the type of crawl (file system versus HTTP), starting directory or URL, number of files to crawl, and so on, to the spider.

As the spider finds files and directories, it returns them to the Content Categorization system. The primary data passed back into the Content Categorization system is a URL and its directory path.

PeopleCode then maps the file to the appropriate folders. If the administrator has enabled and selected autocategorization, then the file is passed to the autocategorization engine.

The file is analyzed, and the directory path is replaced with a folder path or paths. If the resulting paths match a folder, the URL or file is mapped or placed within it. The spider can do this for hundreds or thousands of documents, thus filling in a hierarchy.

Any files and any auto-expanded subfolders created with the spider can only be added, modified, or removed by the spider. This restriction prevents having manually added entries orphaned if the spider no longer finds a directory path upon subsequent passes.

---

**Note.** The HTTP categorization spider does not operate on DB2/OS390.

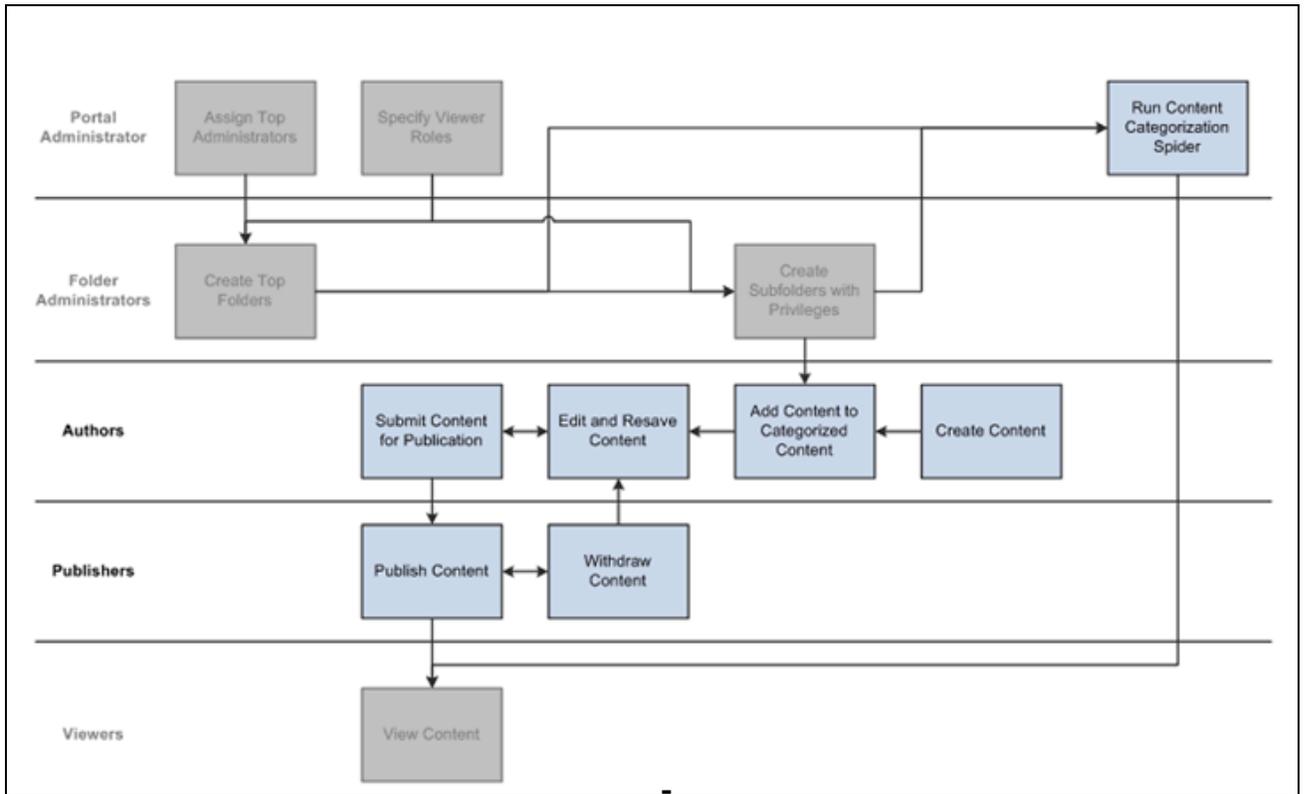
---

### ***Using the Content Categorization Spider***

Two procedures are available for creating categorized content: manually and automatically using the content categorization spider. Using the content categorization spider to automatically populate categorized content folders consists of these high-level steps:

1. Identify data source folders and files.
2. Create a spider run control entry, which defines the content source.
3. Associate the content source with a folder.
4. Run the content categorization spider.

The following diagram highlights the content categorization spider along with the manual steps for creating categorized content:



Content categorization spider along with the manual steps for creating categorized content

See [Chapter 5, "Setting Up and Working with Categorized Content," page 151.](#)

## Setting Up to Run the Content Categorization Spider

This section discusses how to:

- Identify data source folders and files.
- Create a spider run control entry.
- Associate a content source with a folder.

### Pages Used to Set Up to Run the Content Categorization Spider

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Categorization Spider	EPPCM_SPIDR_RUN	Content Management, Categorized Content, Categorization Spider	Identify the content source and establish control parameters for running the Application Engine process.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Content Source	EPPCM_CATG_SPIDR	Content Management, Categorized Content, Browse Folders  Click a folder title link on the Browse Categorized Content page to navigate through the folder levels.  Click a folder Properties link or click the Add Folder button at the appropriate folder level on the Browse Categorized Content page.  Select the Content Source tab on the Folder Properties page.	Associate an already defined content data source with the selected folder in categorized content.  <b>Note.</b> The content data source was previously defined on the Categorization Spider page.
Process Scheduler Request	EPPCM_SPIDR_RUN	Content Management, Categorized Content, Categorization Spider  Click the Run button on the Categorization Spider page.	Specify process variables.

## Identifying Data Source Folders and Files

Before running the content categorization spider, you should become familiar with the folder hierarchy and documents available on the source system. You will want to examine the source system to determine:

- The root folder in which to begin the spider.
- The depth to which you want the spider to crawl.
- The type of documents you want to retrieve.

For example, to traverse folders on a local file server to determine the characteristics of the source, you will:

1. Begin by using Windows Explorer to traverse the folder hierarchy of a local file server.

This drive is local to the application server that will run the content categorization spider Application Engine program.

2. Access and open the root folder, for example, the EPAdmin folder.
3. Select the source folder name.
4. Notice the folder hierarchy beneath the root folder.

You will select EPAdmin as the root of the folders to be traversed by the spider.

5. Also, notice the file names and file types in the source folder.

These files, along with files in parallel folders under EPAdmin, will be transferred by the spider during the crawl process.

## Creating a Spider Run Control Entry

Access the Categorization Spider page (select Content Management, Categorized Content, Categorization Spider).

### Categorization Spider

▶ Instructions

Run Control ID: GOOGLE 
[Report Manager](#) [Process Monitor](#) Run

\*Source Type: HTTP Crawler ▼

\*Source Name: Google Website

\*Site Name: EMPLOYEE Employee-facing registry content

\*Spider Start Location: http://www.google.com

Index only in this domain  
 Index only in this hostname

Proxy Hostname:  Proxy Port: 8080

Link Depth: 1 Maximum Document Count:

Create Log File  
 Purge Only (Do Not Crawl)

Logging Interval: 
 Time In Minutes  Number Of Items  Logging Not Required

▼ MIME Types and Filenames

MIME Types	Filenames
<input checked="" type="radio"/> Index all Mime-types <input type="radio"/> Exclude these Mime-types <input type="radio"/> Index only these Mime-types <div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div>	<input checked="" type="radio"/> Index all filenames <input type="radio"/> Exclude these filenames <input type="radio"/> Index only these filenames <div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div>

Categorization Spider page

**Run Control ID** Enter the run control name that is similar to the source name.

**Source Type**

Select the type of crawl that will be performed. Available options are:

- *Auto Categorized File Server*

Categorization is not based upon the directory path of the file. Instead, the file is sent to an autocategorization engine. It is analyzed and categorized, and the folder path or paths are returned by the categorization engine.

See [Appendix C, "Performing Content Autocategorization,"](#) page 341.

- *File Server*

The run control specifies a starting directory relative to the application server. The directory and any subdirectories are searched for files of the specified MIME type. Path names for the files that are found are converted into URLs, using the specified information, so that the documents can be accessed from links in the portal.

The categorization path or hierarchy for a file is its full directory path minus any drive designation on the left and the filename on the far right. For example, given the location

*F:\resources\docs\support\answer\_books\WhereDoIStart.doc*, the categorization path is *\resources\docs\support\answer\_books\*.

---

**Note.** The system automatically converts backward slashes (Microsoft Windows) to forward slashes (UNIX), and you need not include the right-most slash. As a result, */resources/docs/support/answer\_books* is an acceptable string.

---

- *HTTP Crawler*

Starting in the specified URL, a file is opened and analyzed. Rather than searching for files in subdirectories, an HTTP crawl follows links to find more files. The links in the HTML document determine what files are found, not the directory structure.

The categorization path or hierarchy for a file is the subset of the URL, with the server removed from the left and the filename on the right. For example, given the URL

*http://www.peoplesoft.com/corp/en/products/line/appconnect/portal/features.asp*, the categorization path is */corp/en/products/line/appconnect/portal/*.

**Source Name**

Enter the source name, such as a folder or hierarchy name.

This name is an arbitrary name that you use to identify the source.

**Index URL**

Enter the source location as it relates to the batch server.

For example, for a file server crawl, this value should be a file protocol-based URL that is accessible from the machine on which the spider runs. This URL represents the starting point from which the spider begins its search for files, such as *c:/mydocuments, \\myserver\my\_shared\_folder\News Articles, c:\mydocs, or /usr/local/public\_docs*.

For an HTTP crawl, this value can be any valid and accessible HTTP-based URL.

**Remap Path to This URL** This field is relevant only for jobs that are based on file protocol-based URLs. Since all documents must be accessible by HTTP, this parameter specifies the HTTP URL equivalent of the file-based URL specified in the URL field. It is used to construct valid URLs for other directories and files that are encountered during a crawl.

For example, if the specified URL is *c:/news*, when a file server crawl encounters the URL *c:/news/article.html*, the HTTP alias *http://myserver/news* indicates that *article.html* is accessible at *http://myserver/news/article.html*. Typically, you are required to incorporate content file systems into the document tree of an accessible web server using symbolic links, virtual directories, and so on.

**Index only in this hostname** Available only when the source type is *HTTP Crawler*.

Select to prevent the spider from searching other web sites to which the source is linked.

---

**Warning!** You can potentially mix up data from multiple hosts if you perform a crawl with the Host Affinity option deselected.

---

**Link Depth** Enter the number of levels of links that the job should process.

**Maximum Document Count** Enter the maximum number of documents and directories that the job should process before terminating.

This value establishes reasonable limits for extremely large or open-ended crawls.

---

**Note.** The content categorization crawler can process a maximum of 99,999 files.

---

**Create Log File** Select to create a log file.

The log file appears in the files subdirectory of process scheduler:  
*\$PS\_HOME/appserv/prcs/<server domain name>/files.*

This file provides details about the processed URLs and their associated folder path directories.

**Mime Types** Enter the file types to include in the search.

Confirm that your browser can view these file types. Autocategorization search engines might have additional file type limitations. For file server crawls, this value should be a comma-delimited list of file extensions, such as *.txt,.xml*, or *.html*. For HTTP protocol-based crawls, this value should be a comma-delimited list of Multipurpose Internet Mail Extensions (MIME) types, such as *text/html*, *application/pdf*.

### **Autocategorization**

The Autocategorization section appears only when the source type is *Autocategorized File Server*.

**Autocat Name** (autocategorization name) Select the name of the autocategorization engine from the list of source names entered when vocabularies were defined.

<b>Vocabulary Name</b>	Select a defined vocabulary name that is used by the selected autocategorization engine for a hierarchy into which it can classify documents.
<b>Max. Categories</b> (maximum categories)	Enter the maximum number of categories (folders) into which the autocategorization engine autoclassifies each document.  Some engines may not support this feature.
<b>Autocategorization Threshold</b>	Enter a value to override the threshold on the Content Source page. <hr/> <b>Note.</b> Some autocategorization engines rank their categorization scores that indicate how confident the engine is about its recommendation. Not all autocategorization engines support rankings, and the range of allowable values is engine-dependent. <hr/>

## Associating a Content Source with a Folder

Access the Content Source page (select Content Management, Categorized Content, Browse Folders; click a folder title link on the Browse Categorized Content page; click a folder Properties link, or click the Add Folder button at the appropriate folder level on the Browse Categorized Content page; and select the Content Source tab from the Folder Properties page).

Spider Source Values				
*Source Type:	File Server	<input checked="" type="checkbox"/> Auto Expand Folder	Score:	0.00000
*Source Name:	PeopleSoft Docs	Sequence:	1	
*Source Path:	/ps/images/portal_pa/website/about_PSFT			

Content Source page

This page is used to specify the crawled spider source that generates the child content and child folders in this parent folder.

**Note.** You must set up your content sources using the Categorization Spider page before you enter information on this page.

<b>Source Type</b>	<p>Specify the same source type that was specified on the Categorization Spider page. Available options are:</p> <ul style="list-style-type: none"> <li>• <i>Auto Categorized File Server</i></li> <li>• <i>File Server</i></li> <li>• <i>HTTP Crawler</i></li> </ul>
<b>Source Name</b>	<p>Select a source name from a list of available names.</p> <p>The source names is restricted to those that you defined on the Categorization Spider page with the selected source type.</p>
<b>Source Path</b>	<p>Specify the content location within the source:</p> <ul style="list-style-type: none"> <li>• For file servers and HTTP sources, this value is the directory path, such as <i>/docs/departments/hr</i>.</li> <li>• For HTTP crawls, this is the directory path within the URL.</li> </ul> <p>For example, if the URL is <i>http://myserver/docs/departments/hr/holidays.doc</i>, then the directory path is <i>/docs/departments/hr</i>.</p> <ul style="list-style-type: none"> <li>• For autocategorization sources, this value is the folder or classification path.</li> </ul> <p>For example, <i>/technology/computers/hardware</i>.</p> <p>When you select a value for the source name using the lookup prompt, the system automatically inserts the correctly formatted string into the Source Path field based on the value defined for the Spider Start Location field on the Categorization Spider page.</p>
<b>Auto Expand Folder</b>	<p>Select to have the spider crawl subfolders on the source.</p> <p>For example, if the path <i>/docs</i> is specified as the source detail of a file-server-based folder course, then all the subfolders and content below the <i>/docs</i> directory is processed recursively during a crawling job. Every subfolder on the source becomes a new subfolder beneath the current folder within the hierarchy if the subfolder does not already exist. If this option is deselected, only the content that resides directly at the root of the source path is processed.</p>
<b>Score</b>	<p>Enter the rank that a piece of content must have to be retrieved from an autocategorization engine.</p> <p>Some autocategorization engines rank categorizations with scores that indicate how confident the engine is about its recommendation. Stipulating a minimum allowable score establishes the degree of relevancy that content must have before being allowed into a folder. All autocategorization engines might not support rankings, and the range of allowable values is engine-dependent.</p> <p>See <a href="#">Appendix C, "Performing Content Autocategorization," page 341</a>.</p>



---

## Debugging a Run of the Content Categorization Spider

All crawled content is automatically published and immediately appears to the appropriate users. If you discover a document that is not appropriate for viewing, access the Unpublish Content page to unpublish the content item or click the Save/Unpublish button on the individual content item.

If the spider runs successfully but no content is mapped into your hierarchy, there could be a number of causes and resolutions. Most likely, you may not have mapped a folder to a valid directory or folder path returned by the spider. Content source paths for file server crawls should be the directory path minus any drive indicator and the filename. Content source paths for HTTP crawls should be the directory path of the URL, so remove the domain and filename.

On the Content Source page for a folder, you should ensure that the source details are set to a text string or path that is the same as found by the spider. In the log file, look for log entries containing the phrase *Got path from url*.

See [Chapter 7, "Setting Up and Working With News Publications," Withdrawing News Articles, page 226](#).

---

## Making Categorized Content Available on Other Sites

You can use the content categorization spider to make retrieved content available on other sites. To accomplish this, after you have run the content categorization spider on the main site, create a folder on the other site that uses the same content source as the main site. Then, run the spider process while on the other site using the same run control ID as the main site. The system creates an index used by both sites that picks up the same content and marks it as located in both sites.

To make content on one site available from another site:

1. Run the content categorization spider on the main site.

Make a note of the content categorization spider run control ID for use later.

2. On the other site, create a folder in categorized content that specifies the same content source as the main site.
3. Run the content categorization spider on the other site specifying the same run control ID that you used on the main site.

After you successfully run the content categorization spider, the subfolders and files viewed on the main site are available on this site. Notice that the content IDs for the files are the same as they are on the main site, indicating that the content is shared, not copied to the second site.

---

## Reviewing Delivered Sample Categorized Content Data

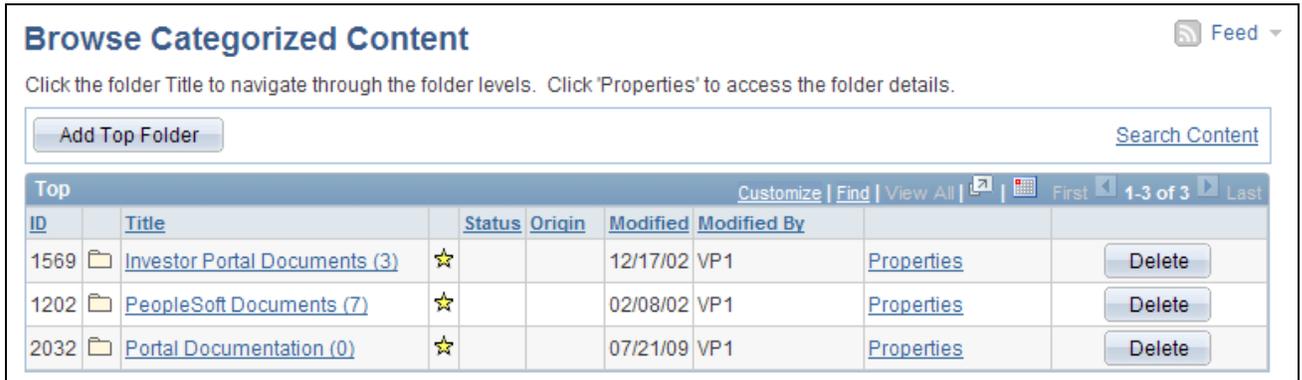
This section discusses how to:

- Browse categorized content.

- Use the Products folder.
- Use the Portal Implementation folder.

## Browsing Categorized Content

Access the Browse Categorized Content page (EPPCM\_HIERTOP\_MAIN) (select Content Management, Categorized Content, Browse Folders) to view delivered folder sample data.



The screenshot shows the 'Browse Categorized Content' page. At the top, there is a title 'Browse Categorized Content' and a 'Feed' icon. Below the title, there is a navigation instruction: 'Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder details.' There are two buttons: 'Add Top Folder' and 'Search Content'. Below this is a table with columns: ID, Title, Status, Origin, Modified, Modified By, Properties, and Delete. The table contains three rows of data.

ID	Title	Status	Origin	Modified	Modified By	Properties	Delete
1569	<a href="#">Investor Portal Documents (3)</a>	★		12/17/02	VP1	<a href="#">Properties</a>	<a href="#">Delete</a>
1202	<a href="#">PeopleSoft Documents (7)</a>	★		02/08/02	VP1	<a href="#">Properties</a>	<a href="#">Delete</a>
2032	<a href="#">Portal Documentation (0)</a>	★		07/21/09	VP1	<a href="#">Properties</a>	<a href="#">Delete</a>

### Browse Categorized Content page

This page displays the top-level list of folders to which you have security to view. Clicking further down the hierarchy allows you to navigate or discover subfolders and related documents. Clicking the link for a document displays the document contents.

The sample data delivered with the PeopleSoft Enterprise Portal includes one folder called *PeopleSoft Documents*. This folder shows some representative documents from <http://www.peoplesoft.com>, such as product information, white papers, and case studies. It is designed to show a combination of manually added folders, documents, and crawled content.

This is an example of the sample data delivered with the PeopleSoft Enterprise Portal - PeopleSoft Documents folder:

**Browse Categorized Content** Feed ▾

Click the folder title to navigate through the folder levels. Click 'Properties' to access the folder or content details. Click the content title to preview the content.

[Properties](#)
[Search Content](#)

Filter By:  ▾

[Top](#) > [PeopleSoft Documents](#)

Sample documents from various portions of PeopleSoft.com (including some from Customer Connection, whose access will be restricted to just employees & customers)

PeopleSoft Documents								Customize	Find	View All	Print	Calendar	First	1-6 of 6	Last	
ID	Title	Status	Origin	Modified	Modified By	Properties	Delete									
1203	<a href="#">About PeopleSoft (4)</a>	★		02/08/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>									
1204	<a href="#">Portal Implementation (6)</a>			02/08/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>									
1208	<a href="#">Products (3)</a>			02/08/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>									
1209	<a href="#">Support (3)</a>			02/08/02	VP1	<a href="#">Properties</a>	<input type="button" value="Delete"/>									
1201	<a href="#">PeopleSoft.com</a>	Published	Categorize	02/08/02	VP1	<a href="#">Properties</a>										
1202	<a href="#">PeopleStore</a>	Published	Categorize	02/08/02	VP1	<a href="#">Properties</a>										

Example of delivered folder sample data - PeopleSoft Documents folder

The first-level folders are divided into two groups of user access:

- The two general information folders, *About PeopleSoft* and *Products*, are visible to all users (PAPP\_USER, PAPP\_CUSTOMER, PAPP\_EMPLOYEE, and PAPP\_SUPPLIER).
- The other two folders, *Portal Implementation* and *Support*, contain documents relevant to customers and, therefore, have restricted access (PAPP\_CUSTOMER and PAPP\_EMPLOYEE only).

There is difference in how content was added by clicking the Properties link and reviewing the property details; some documents were added manually, others were added by the categorization spider. The latter collection is from a directory structure that simulates data from the PeopleSoft corporate web site.

After the PeopleSoft Enterprise Portal is installed, you will find these files on your web server under one of the following directories:

- For WebLogic:

```
<weblogic install directory>
bea\wlserver6.1\config\peoplesoft\applications\PORTAL\ps\images\portal_pa\website
```

- For WebSphere:

```
<websphere install
directory>\WebSphere\Appserver\installedApps\peoplesoft\PORTAL\ps\images\portal_pa\website
```

## Using the Products Folder

The Products folder is an example of an auto-expanded folder. The About PeopleSoft and Support folders are also auto-expanded folders. The directory structure under the Products folder is divided into three types of product lines with many products under each. Each product directory typically has subdirectories containing articles, case studies, or both.

The auto-expand feature enables an administrator to define just the desired top folder. Subfolders underneath are then automatically created as they are encountered. Look at the definition for the Products folder.

Creating a source path on the Content Source page (EPPCM\_CATG\_SPIDR) means that content from the spider should potentially be mapped into this folder. First, it defines the content source—a file server crawl called PeopleSoft Documents. Within that spider run, it will map all documents contained within that directory to this Content Categorization folder if it encounters a specified directory.

In this example, Source Details is the subdirectory, as in */ps/images/portal\_pa/website/products*:

Spider Source Values		Find	First	1 of 1	Last
*Source Type:	File Server	<input checked="" type="checkbox"/>	Auto Expand Folder	+	-
*Source Name:	PeopleSoft Docs	Score:	0.00000	Sequence:	1
*Source Path:	/ps/images/portal_pa/website/products				

Save

[Return to Browse Categorized Content](#)

Content Source page, Products folder

Start the auto-expand feature by selecting the Auto Expand Folder option. The 45 subfolders under the Products folder are created as subfolders, and the 148 documents contained in those subfolders are mapped to their appropriate subfolder. If the publish and remove dates are specified, then all 148 documents found under the Products folder inherit these dates.

Access the Folder Security page (EPPCM\_CATG\_MEM) for the Products folder:

Folder Properties
Folder Security
Content Source

Specify the Members, Privileges and Viewers. A Privilege specifies the actions a user can perform upon the folder and the content located in that folder.

[Top](#) > [PeopleSoft Documents](#) > [Products](#)

Member Privileges
Customize | Find | View All | | First 1 of 1 Last

Member Type	Member Name	Privilege Sets		
Role	PAPP_CONTCATG_ADMIN	Administrator	Edit	Delete

Add Member
Inherit Members

Viewer Roles
Customize | Find | View All | | First 1-4 of 4 Last

Role Name	Description	
PAPP_CUSTOMER	Portal Customer	Delete
PAPP_EMPLOYEE	Portal Employee	Delete
PAPP_SUPPLIER	Portal Supplier	Delete
PAPP_USER	Enterprise Portal User	Delete

Add Viewer
Inherit Viewers

Cascade Viewer Roles to Child Folders on Save

Save

[Return to Browse Categorized Content](#)

### Folder Security page - Products folder

Four roles are assigned for viewing since this folder contains documents applicable to almost all users. The sublevel folders created with the auto-expand feature also inherit these viewer and administrator roles. Click the Return to Browse Categorized Content link, and then click the Products folder and view its contents.

This folder contains no documents because no files were contained in the directory `C:\bea\wlsrver6.1\config\peoplesoft\applications\PORTAL\ps\images\portal_pa\website\products` (only subfolders).

Note that no Delete buttons are associated with the three sublevel folders, and property information is read-only. Any folder or content that is automatically created by the spider cannot be edited or removed by manual administration because it may change or disappear the next time the spider is invoked. All auto-expanded folders and content can only be added, modified, or removed with the spider.

---

**Note.** You should activate the Auto Expand Folder option at a strategic level that minimizes manual administration and is not too high in the taxonomy to maximize flexibility.

---

## Portal Implementation Folder

The *Portal Implementation* folder is an example that combines manual entries with auto-expand functionality. First, note that its folder definition does not activate the expand option. Thus, folders and content can be manually added below it. The Portal Implementation folder contains both manual and automated entries.

The three sublevel folders at this level were all defined manually. This way, they can contain both manual and automated entries (see the Technology folder). Note that the Auto Expand Folder option is activated in each case, so that any subfolders are automatically created. The two documents, Portal Solutions and Portal Solutions Overview, were manually added and reference-approved documents in the Content Management system.

The `business_persons_guide.pdf` document was added by the spider. Access the Folder Properties page and see that most of the attributes of the auto-created document entry cannot be modified. However, an administrator can manually change the title so that it is more meaningful for users. Also, an administrator can unpublish the document if it is inappropriate for any reason.

## Chapter 7

# Setting Up and Working With News Publications

This chapter provides an overview of the News Publications feature and discusses how to:

- Set up news publications.
- Manage sections and section articles.
- Add news articles.
- Associate images with news articles.
- Delete news publications.
- Manage news articles.
- Administer news content.
- Publish news publications.
- View news publications.

---

**Note.** The functions discussed in this chapter can be accessed through the menu item **Browse Publications**.

---

---

## Understanding News Publications

In Oracle's PeopleSoft Enterprise Portal, a news publication enables organizations to organize content by sections and articles and then present that content to a defined audience through a homepage pagelet.

You can have multiple news publications as different pagelets to meet various communication needs of your organization, such as company-wide news, local interest, product line, or department. Each separate publication can be managed by a separate group of publishers, and content can be tailored by these publishers for a focused target audience. In these publications, you further organize articles into sections, create top stories, and offer users the opportunity to submit new content to the publisher for consideration. Articles can come from a variety of sources—everything from ad hoc HTML or file submissions to selections from the Managed Content feature. Publishers can reuse the same article in various news publications to reach their entire target audience.

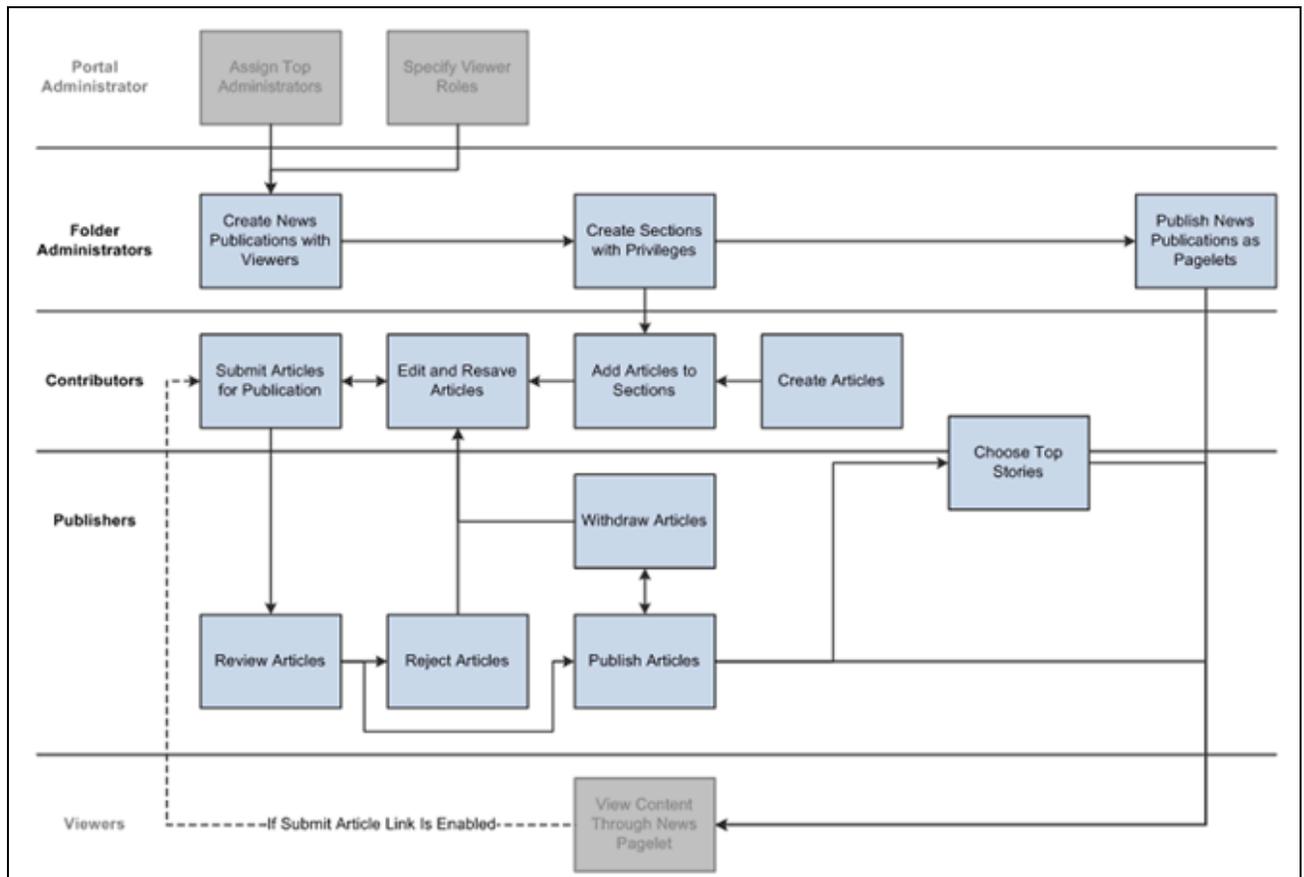
A news publication pagelet presents information to users in an easy-to-use, focused format, and enables publishers to incorporate images and designate top stories to emphasize content.

This figure illustrates the following aspects of a news publication pagelet: publication title, associated images, top stories, articles, sections, Submit Articles link, and Feed link:



The aspects of a news publication pagelet

A news publication enables organizations to organize content by sections and articles and then present that content to a defined audience through a homepage pagelet. This process flow diagram highlights the steps to develop a news publication:



Process flow for developing a news publication

These are the steps to develop a news publication as shown in the previous process flow diagrams:

1. Create a news publication and assign the audience as a viewer role (top administrator).
2. Create sections in the news publication and assign privileges to each section (folder administrator).
3. Create and add news articles to the sections (contributors).
4. Submit articles for publication (contributors).
5. Review articles and determine the appropriate action: reject or publish (publishers).
6. Publish articles; withdraw published articles as appropriate (publishers).
7. Choose top stories (publishers and contributors).
8. Publish news publications as pagelets (top administrators).
9. If the Submit button is enabled for the news publication, submit articles through the pagelet (viewers).

## Setting Up News Publications

This section discusses how to:

- Create news publications.
- Add folder security.

## Pages Used to Set Up News Publications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Folder Properties	EPPCM_CATG_MAIN	Content Management, News Publications, Browse Publications  Click the Add Publication button or the Properties link on the Browse News Publications page.	Set the properties for a new folder or update property details for an existing folder.  <b>Note.</b> Use this page for news publications as well as for sections.
Folder Security	EPPCM_CATG_MEM	Content Management, News Publications, Browse Publications  Click the Add Publication button or the Properties link on the Browse News Publications page.  Select the Folder Security tab on the Folder Properties page.	Manage the folder members and their privileges.  This page lists the members and privilege sets for the current folder. Actual privileges are assigned on the Folder Security - Set Members Privileges page.
Folder Security - Set Members Privileges	EPPCM_CATG_PRIV	Content Management, News Publications, Browse Publications  Click the Add Publication button or the Properties link on the Browse News Publications page.  Select the Folder Security tab, and click the Add Member button on the Folder Security page.	Define users and roles and specify their access privileges.

## Creating News Publications

Access the Folder Properties page (select Content Management, News Publications, Browse Publications; click the Add Publication button or the Properties link on the Browse News Publications page).

Folder Properties
Folder Security

Define the folder properties and details of the Top Folder. Child content created from this folder uses the specified child default values.  
[News Publications](#) > [Company News](#)

\*Title:

Summary:

Owner:  [PPLSOFT](#)

Allow Submits from Pagelet

Folder ID: 1031      Feature: News Publications

Modified: 07/21/2009 1:05PM      Modified By: [Vice President of Finance](#)

Child Content Defaults

\*File Storage:  Documents in Database

\*Viewer Role:  Portal Employee

\*Date Type:

\*Publish Date:

\*Expire Date:

\*Inactive Date:

[Return to Browse News Publications](#)     
 [Publish as Pagelet](#)     
 [Publish as Feed](#)

#### Folder Properties page: News Publications feature

Users can add folders at any level for which they have authorization. Only top administrators can create news publications at the root of the news publications feature. At the section level, any folder members with the proper privilege can add sections.

<b>Title</b>	Enter the name of the pagelet as it will appear in the pagelet header.
<b>Summary</b>	Add a brief description of the content. This field supports HTML entries.
<b>Allow Submits from Pagelet</b>	Select to enable users to submit news articles from the homepage pagelet.
<b>Publish as Pagelet</b>	Click to access the Publish Pagelet Wizard Definition page, where you can publish a folder in the content management system as a pagelet.

---

**Note.** This link is available only when the user has publish folder permission.

---

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Pagelet, page 97.](#)

<b>Publish as Feed</b>	<p>Click to access the Publish Feed Definition page, where you can publish a folder in the content management system so that it is accessible as a feed.</p> <hr/> <p><b>Note.</b> This link is available only when the user has publish folder permission. Only top publication can be published as feed.</p> <hr/> <p>See <a href="#">Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Feed, page 96.</a></p>
<b>Child Content Defaults</b>	
Child content created from this folder uses the specified child default values.	
<b>File Storage</b>	<p>Select the storage locations for any content that are attached files.</p> <p>Available locations are based on those defined on the Define File Storage page.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Defining Document Storage Locations, page 21.</a></p>
<b>Viewer Role</b>	<p>Select a default viewer for newly added content.</p> <p>The choice of viewer roles is based on the list constructed on the Define Viewer Roles page. The default viewer role on the publication top folder is used as the default viewer role when publication sections are created. The default viewer role of this section is used to provide the viewer role for the content created within the section. The viewer roles of the content are actually used in determining the security for displaying the content within the News Publication pagelet.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Specifying Viewer Roles, page 21.</a></p>
<b>Date Type</b>	<p>Select either <i>Relative Date</i> or <i>Absolute Date</i> to define content default publish and expiration dates for this publication.</p> <hr/> <p><b>Note.</b> This value can be redefined on the section level.</p> <hr/>
<b>Publish Date</b>	Select the content default publish date for this publication.
<b>Expire Date</b>	Select the expiration date for the default values of the content in this folder.

**Inactive Date**

Select different periods of time as dates when the content will become inactive.

This is the default value used for content created in this folder. You can also select the option to not inactivate the content. Available options are:

- *Current Date*
- *Current Date + 1 Week*
- *Current date + 30 Days*
- *Current Date + 90 Days*
- *Current Date + 365 Days*
- *Current Date +999 days*
- *Never Archive*

See [Chapter 2, "Setting Up the Content Management System," Administering the Content Management System, page 6.](#)

**Adding Folder Security**

Access the Folder Security page (select Content Management, News Publications, Browse Publications; click the Add Publication button or the Properties link; select the Folder Security tab).

Folder Properties

Folder Security

Specify the Members, Privileges and Viewers. A Privilege specifies the actions a user can perform upon the folder and the content located in that folder.

[News Publications](#) > [Company News](#) > [Events](#)

Member Privileges			Customize   Find   View All       First <span style="margin: 0 5px;">◀</span> 1-3 of 3 <span style="margin: 0 5px;">▶</span> Last	
Member Type	Member Name	Privilege Sets		
Role	PAPP_CONTENT_MANAGER	Manager	Edit	Delete
Role	PAPP_PUBLISHER	Publisher	Edit	Delete
User	VP1	Publisher	Edit	Delete

Add Member

Inherit Members

Add Members to Parent Folder (with Viewer Privilege Set) on Save

Save

[Return to Browse Publication Sections](#)

Folder Security page: News Publications feature

A new section automatically inherits the members and privileges of its parent news publication. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an **Inherit Members** button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

---

**Note.** A top administrator is automatically granted all privileges for all content and folders of the feature without being an explicitly assigned or listed member of a folder.

---

<b>Member Privileges</b>	<p>Displays type, name, and privilege sets for the members of the folder.</p> <p>Privileges specify the actions that a member can perform on the folder and the content contained in the folder.</p> <hr/> <p><b>Note.</b> A viewer member privilege defined in the Member Privileges section of the page is not equivalent to a viewer role defined in the Viewer Roles section of the page, even if the same role ID is used. In the case of the former, a viewer member privilege allows that member to view the folder and all of its contents (in draft, pending, or published states) through the folder hierarchy. The latter allows users with that role to view only published content and only through the Browse by Category page.</p> <hr/>
<b>Edit</b>	Click to edit privileges of this member.
<b>Delete</b>	Click to remove the member and prohibit him or her from accessing content from this folder.
<b>Add Member</b>	Click to access the Folder Security - Set Members Privileges page to assign members and determine the actions they can perform on the folder and the content located in that folder.
<b>Inherit Members</b>	Click to inherit members from the parent folder.
<b>Add Members to Parent Folder (with Viewer Privilege Set) on Save</b>	Select to add viewer members to the parent folders.

### ***Assigning Member Privileges***

Access the Folder Security - Set Members Privileges page (select Content Management, News Publications, Browse Publications; click the Add Publication button or the Properties link, select the Folder Security tab, and click the Add Member button or the Edit button on the Folder Security page).

### Folder Security

## Set Members Privileges

Select members and their privilege security.

**Members**

\*Member Type:  \*Member Name:

Member Privileges	
Privilege Set	Privileges
<input type="checkbox"/> Administrator	Add Folder Edit Folder Delete Folder Assign Members Add Content Edit Content Edit Content Metadata Delete Content Delete Approved Content Publish Content Release Locked Content View Content Discussions Add Content Discussions Moderate Content Discussions Subscribe to Content View Content and Folder
<input type="checkbox"/> Contributor	Add Content View Content Discussions Add Content Discussions Subscribe to Content View Content and Folder

Folder Security - Set Members Privileges page: News Publications feature

**Member Type**                      Select a membership type of *User* or *Role*.

**Member Name**                      Select a member name.

**Privilege Set**                      Assign privileges to this member by selecting privilege sets.

---

**Note.** The privilege sets and privileges listed for each set reflect the privilege sets that were defined for the Categorized Content feature.

---

See [Chapter 2, "Setting Up the Content Management System," Defining Privilege Sets, page 11.](#)

---

## Managing Sections and Section Articles

This section discusses how to:

- Add sections to publications.

- Manage section articles.

## Pages Used to Manage Sections and Section Articles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Folder Properties	EPPCM_CATG_MAIN	<p>Content Management, News Publications, Browse Publications</p> <p>Click a folder title on the Browse News Publications page to navigate through the folder levels.</p> <p>Click the Add Folder button or the Properties link at the appropriate level on the Browse Publication Sections page.</p>	<p>Define the properties for a new folder or update property details for an existing folder. Use the Folder Properties page for news publications as well as for sections within a publication. At the publication level, any folder members with the proper privilege can add sections.</p>
Folder Security	EPPCM_CATG_MEM	<p>Content Management, News Publications, Browse Publications</p> <p>Click a folder title on the Browse News Publications page to navigate through the folder levels.</p> <p>Click the Add Folder button or the folder Properties link, and select the Folder Security tab on the Folder Properties page.</p>	<p>Add new members or inherit members from the parent folder.</p>
Folder Security - Set Members Privileges	EPPCM_CATG_PRIV	<p>Content Management, News Publications, Browse Publications</p> <p>Click a folder title on the Browse News Publications page to navigate through the folder levels.</p> <p>Click the Add Folder button or the folder Properties link, and select the Folder Security tab on the Folder Properties page.</p> <p>Click the Add Member button on the Folder Security page.</p>	<p>Assign members and determine the actions they can perform on the folder and the content located in that folder.</p>

Page Name	Definition Name	Navigation	Usage
Browse Section Articles	EPPCM_HIERNWS_MAIN	Content Management, News Publications, Browse Publications  Click a section that has no children on the Browse Publication Sections page.	View basic information about the articles within a single section of a news publication and access article details.  You can add, edit, delete, or view articles depending on article status and member privileges for the section.

## Adding Sections to Publications

Access the Folder Properties page (select Content Management, News Publications, Browse Publications; click a folder title on the Browse News Publications page; click the Add Folder button or the folder Properties link).

Folder Properties Folder Security

Define the folder properties and details. Child content created from this folder uses the specified child default values.  
[News Publications](#) > [Company News](#) > [Events](#)

\*Title:

Summary:

Owner:  [Vice President of Finance](#)

Required Section on Pagelet

Folder ID: 1039 Feature: News Publications

Modified: 12/12/2001 3:20PM Modified By: [Vice President of Finance](#)

Child Content Defaults

\*File Storage:  Documents in File Server

\*Viewer Role:  Portal Employee

\*Date Type:

\*Publish Date:

\*Expire Date:

\*Inactive Date:

[Return to Browse Publication Sections](#)

Folder Properties page with the Required Section on Pagelet option selected

See [Chapter 7, "Setting Up and Working With News Publications," Creating News Publications, page 198.](#)

**Required Section on Pagelet**

Select this option if you want this section to appear on the pagelet.

This selection forces the section onto the pagelet for all viewers and can be used to communicate important information when used in conjunction with a pagelet that is registered as required on a homepage tab.

**Note.** This selection does not enable all viewers to view all articles; viewer roles on the articles still control whether a viewer can view any particular article on a pagelet.

After you select the Required Section on Pagelet option, a new section automatically inherits the members and privileges of its parent news publication in the Folder Security page. However, privileges added later are not automatically transferred down the folder hierarchy and must be updated on a folder-by-folder basis. To assist with this process, an Inherit Members button appears when you view folder security for any subfolder, enabling you to quickly duplicate the same members as assigned to the parent folder.

See [Chapter 7, "Setting Up and Working With News Publications," Creating News Publications, page 198.](#)

## Managing Section Articles

Access the Browse Section Articles page (select Content Management, News Publications, Browse Publications; click a section that has no children on the Browse Publication Sections page).

The screenshot shows the 'Browse Section Articles' interface. At the top, there is a title 'Browse Section Articles' and a 'Feed' icon. Below the title, there are instructions: 'Click the folder title to navigate through the folder levels. Click 'Properties' to access the folder or content details. Click the content title to preview the content.' There are buttons for 'Add Article', 'Properties', and 'Search Content'. Below these are filters for 'Status' (set to 'All'), 'Type' (set to 'All'), and a checkbox for 'Published in Last 30 Days' with a 'Filter' button. The breadcrumb path is 'News Publications > Company News > Events'. The main content area is titled 'Event News' and contains a table of events.

ID	Title	Status	Origin	Publish	Expire		
1022	<a href="#">Connect Conference</a>	Published	News	09/01/2000		<a href="#">Properties</a>	
1001	<a href="#">Grand Opening in Milano</a>	Published	News	06/13/2000		<a href="#">Properties</a>	
1024	<a href="#">Hot Talks: Free Tuition</a>	Published	News	09/01/2000	09/22/2010	<a href="#">Properties</a>	
1010	<a href="#">Internal Communication Survey Winners!</a>	Rejected	News	06/21/2000		<a href="#">Properties</a>	<a href="#">Delete</a>
1025	<a href="#">Nominate your favorite PS employee</a>	Published	News	09/11/2000	09/27/2010	<a href="#">Properties</a>	
1023	<a href="#">Sale on Financials</a>	Published	News	09/07/2000	09/21/2010	<a href="#">Properties</a>	
1021	<a href="#">Save the Date to Celebrate</a>	Published	News	01/01/2000		<a href="#">Properties</a>	
1005	<a href="#">SchoolHouse Rocks</a>	Published	News	06/13/2000		<a href="#">Properties</a>	

Browse Section Articles page

Use the Browse Section Articles page to display basic information about the articles within a single section of a news publication. This page provides access to article details. You can add, edit, delete, or view articles depending upon article status and member privileges for the section.

<b>Feed</b>	Hover over any of these to view the list of feeds published for this discussion forum. Click any list item to open that feed document. Click the Feed button or Feed link to open the first feed document in the list. Click the Open menu button to toggle the list of feeds between frozen open and closed.  See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features</i> , "Working With Feeds and Alerts."
<b>Add Article</b>	Select to add a new article to this section.
<b>Filter</b>	Click to limit the number of articles displayed on the page based on the values entered for the Status, Type, and Published in Last 30 Days fields.
<b>Status</b>	Select to search articles with a status of <i>Draft</i> , <i>Pending</i> , <i>Published</i> , <i>Rejected</i> , <i>Rework</i> , or <i>All</i> .
<b>Type</b>	Select to search articles with a type of <i>File</i> , <i>Text/HTML</i> , <i>Web Site</i> , or <i>All</i> .
<b>Published in Last 30 Days</b>	Select to limit your search to articles published within the last 30 days.

### Section Articles



The star icon indicates articles that were added within the last five days.



The Published icon indicates published articles.

**Status** Displays the current publishing status of the article: *Draft*, *Pending*, *Publish*, *Reject*, or *Rework*.

---

**Note.** You can use the Status drop-down list box to search based on a selected status.

---

<b>Origin</b>	Displays where the article originated. Values are: <ul style="list-style-type: none"> <li>• <i>News</i>: Indicates that the article was created from the News Publications feature.</li> <li>• <i>Managed</i>: Indicates that the article was imported from the Managed Content feature.</li> </ul>
<b>Publish</b>	Display the dates that articles are scheduled to be published based on the folder properties for this section.
<b>Expire</b>	Display the dates that articles are scheduled to expire based on the folder properties for this section.

**Delete**

Click to delete the selected article.

---

**Note.** You cannot delete published articles from this page. You must first unpublish the article, or use the Administer Content functions.

---

See [Chapter 7, "Setting Up and Working With News Publications," Administering News Content, page 231.](#)

---

## Adding News Articles

This section discusses how to add articles.

### Pages Used to Add News Articles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Section Articles - Add News Article	EPPCM_ADDCONT_SEC	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Add Article button on the Browse Section Articles page.	Specify the type of content you want to add to a section of a news publication. News publications support file attachments, managed content, text or HTML content creation, and website URLs.  <b>Note.</b> Select <i>Managed Content</i> to import existing content into the News Publications feature.
News Publications – Content Properties	EPPCM_CONT_MAIN	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Add Article button on the Browse Section Articles page.  Select the type of content, and then click OK on the Add Article page.	Submit articles for publication.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Text or HTML Properties	EPPCM_VER_HTML_SEC	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Preview link on the Content Properties (Text or HTML) page.	Review the text or HTML content entered on the Content Properties page.
News Publications Properties - Article Locations	EPPCM_CONT_LOC	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Locations link on the Content Properties page.	Select the locations where the article should be published.  <b>Note.</b> Available locations are limited by security access.
Content Notification	EPPCM_CONT_NTIFY	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Notifications link on the Content Properties page.	Send email notifications of saved content to the list of interested parties.
Content Viewers	EPPCM_CONT_VWR	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Viewers link on the Content Properties page.	Select the roles that can view this content when it is published.
Content Comments	EPPCM_CONTCOMM_SEC	Content Management, News Publications, Browse News Publications  Click a title link in the Browse Publication Sections page.  Click the Comments link on the Content Properties page.	Enter any additional information about the article.

## Adding Articles

Access the Browse Section Articles - Add News Article page (select Content Management, News Publications, Browse Folders; click an entry in the Title column; click the Add Article button in the Browse Section Articles page).

Browse Section Articles - Add News Article page

### Content Type

Select a content type. Available options are:

- *File Attachment*

Upload files into PeopleSoft Content Management.

- *Managed Content*

Select existing managed content.

- *Text or HTML*

If you select *Text or HTML*, you can enter HTML tags in the summary field to format text and enter links. For example, if you enter `<B> This information is for internal use only </B>`, the text appears in bold as **This information is for internal use only** in the preview text. If you enter a link `<a href="http://www.myemployeewebsite.com">News</a>`, a link to the web site appears in the preview.

- *Web Site URL*

Enter a web URL.

The News Publication Properties page appears based on the content type that you selected.

### OK

After you select a content type and click this button, a search page appears enabling you to select the piece of managed content to import into a news publication.

---

**Note.** When content is added to managed content, its status is set to *checked out*.

---

## Adding News Publication Attachments

Access the News Publications - Web Site URL Properties page (select Content Management, News Publications, Browse Folders; click an entry in the Title column; click the Add Article button in the Browse Section Articles page; select the type of content, and then click the OK button on the Add Article page).

### Web Site URL Properties Feed

[News Publications](#) > [Company News](#) > [Events](#) > [Oracle OpenWorld 2009](#)

\*Title:  

\*Source:   Inactive Date:  

\*Summary:  

Content ID: 2009      Content Origin: News Publications

**Web Site URL**

 [Preview](#)

URL:

Created: 07/21/2009 2:36PM      Created By: [Vice President of Finance](#)

Modified: 07/21/2009 2:36PM      Modified By: [Vice President of Finance](#)

[Tags](#)

[Locations](#)   [Viewers](#)   [Notifications](#)   [Comments](#)   [Share Content](#)   [Associated Image](#)   [Start Discussion](#)   [Search Content](#)  
[Return to Browse Publication Sections](#)

News Publications - Web Site URL Properties page

---

**Note.** The name of this page and its fields that appear depends on the content type that you selected on the Browse Section Articles - Add News Article page.

---

### Feed

Click to open the feed for this item, if available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts."

### Source

Enter the article source.

This is a free text field. The entry appears on article rendering.

See Chapter 7, "Setting Up and Working With News Publications," Managing Section Articles, page 206.

### Upload File

Click to open a new browser window where you can select a file to upload.

---

**Note.** Uploaded files are saved automatically.

When the folder properties are set to auto-approved, the Version Status field indicates that new content is approved when it is added.

---

<b>Publish</b>	<p>This option appears only if the current user has the <i>Publish Content</i> privilege for the current location and at least one location is listed to be published.</p> <p>Click to save and publish this content item.</p> <p>All fields will become read-only. Published content appears on the Browse Section Articles page to users who have the viewer roles for the parent folder where the content is located.</p>
<b>Unpublish</b>	<p>Click to save the content and save it to Pending Publishing.</p> <p>Nonpublished content does not appear on the Browse Section Articles page.</p> <p>See <a href="#">Chapter 7, "Setting Up and Working With News Publications," <i>Withdrawing News Articles</i>, page 226.</a></p>
<b>Save as Draft</b>	<p>Click to save this content item in draft format.</p> <p>You can continue to edit the content property fields for this item. Content in draft status does not appear on the Browse by Category page because it is not published.</p>
<b>Locations</b>	<p>Click to set the publish and expiration dates for the content in this location and set the item to be published.</p>
<b>Viewers</b>	<p>Click to select the roles that can view this article when it is published.</p> <hr/> <p><b>Note.</b> The choice of viewer roles is based on the list constructed on the Define Viewer Roles page.</p> <hr/> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," <i>Specifying Viewer Roles</i>, page 21.</a></p>
<b>Notifications</b>	<p>Click to create a list of interested parties or send email notifications of saved content to the list of interested parties.</p>
<b>Save</b>	<p>Click to save the content item without changing the publish status.</p>
<b>Comments</b>	<p>Click to add additional comments about this content item.</p>
<b>Associated Image</b>	<p>Select to associate a new or existing image with the article.</p> <hr/> <p><b>Note.</b> The image will appear along with the article when it's viewed.</p> <hr/> <p>See <a href="#">Chapter 7, "Setting Up and Working With News Publications," <i>Associating Images with News Articles</i>, page 214.</a></p>
<b>Start Discussions</b>	<p>Click to begin a discussion topic.</p> <hr/> <p><b>Note.</b> Discussion topics stay with the content item and cannot be accessed outside of the Content Properties page.</p> <hr/>

**View Discussions** This option is available only when a discussion topic already exists for this content item.

Click to view, edit, or enter a response to a discussion.

**Search Content** Click to search for existing content within the Categorized Content feature.

### Choosing Article Locations

Access the News Publications Properties - Article Locations page (select Content Management, News Publications, Browse Folders; click an entry in the Title column; click the Add Article button; select the type of content and then click the OK button; click the Locations link on the News Publications Properties page).

**Web Site URL Properties**

---

**Article Locations**

Select the location(s) where the article should be published. The available locations are limited to your security access.

**Current Location:**  
News Publications > Company News > Events > **Oracle OpenWorld 2009**

Content Locations									
	Publication	Section	Publish Status	Submitted By	Publish Date	Expire Date	Publish	Publication Top Story	Section Top Story
<input type="checkbox"/>	Company News	Headline News							
<input type="checkbox"/>	Company News	Human Resources News							
<input type="checkbox"/>	Company News	Information Technology News							
<input checked="" type="checkbox"/>	Company News	Events	Pending	VP1	07/21/2009	07/21/2010	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Company News	Submitted Articles							
<input type="checkbox"/>	SEC Filings	SEC Filings							
<input type="checkbox"/>	Investor Portal Promotions	Investor News							
<input type="checkbox"/>	Investor News	News Stories Headlines							
<input type="checkbox"/>	Investor News	Events							

News Publications Properties - Article Locations page

To select locations:

1. Select the check box next to the desired publications.
2. Update the publish and expiration dates if necessary.

Default publication and expiration dates appear based on the settings for the selected section.

3. Select the appropriate options to display the article on the News Publications pagelet as a publication top story or as a section top story.

4. Select the Publish option to publish the content from the properties page.

---

**Note.** The button and check box appear only if the current user has publish content privilege for the selected location.

---

**Note.** If desired, you can clear the Publish option to move the article to a different publication as unpublished. You can also click the Submit button on the properties page to submit the article to the new publication with a status of pending.

A blank Publish Date field indicates that the publish date is always current. A blank Expire Date field indicates that the publish date never expires.

---

## Associating Images with News Articles

This section discusses how to:

- View images associated with news articles.
- Associate new images with news articles.
- Associate existing images with news articles.

## Pages Used to Associate Images with News Articles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Associated Image	EPPCM_CONT_IMG	<p>Content Management, News Publications, Browse News Publications</p> <p>Click title links to access the Browse Section Articles page, and click the Add Article button or a content Properties link.</p> <p>Click the Associated Image link on the Content Properties page.</p>	<p>Review which image is associated with a news article.</p> <p>From this page, you can associate an existing image with the article on the Select Associated Image page. Or you can access the Add Associated Image page to add a new image to the article.</p> <p><b>Note.</b> The image will appear along with the article when it's viewed.</p>

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add Associated Image	EPPCM_CONT_IMGADD	<p>Content Management, News Publications, Browse News Publications</p> <p>Click title links to access the Browse Section Articles page, and click the Add Article button or a content Properties link.</p> <p>Click the Associated Image link on the Content Properties page.</p> <p>Click the Add New Image button on the Associated Image page.</p>	<p>Add a new image to the content management system to associate it with news articles.</p> <p><b>Note.</b> The image is stored in the system when you click Save New Image.</p>
Select Associated Image	EPPCM_CONT_IMGSEL	<p>Content Management, News Publications, Browse News Publications</p> <p>Click title links to access the Browse Section Articles page, and click the Add Article button or a content Properties link.</p> <p>Click the Associated Image link on the Content Properties page.</p> <p>Click the Add Existing Image button on the Associated Image page.</p>	<p>Associate an existing image in the content management system with the selected news article.</p>

## Viewing Images Associated with News Articles

Access the Associated Image page (select Content Management, News Publications, Browse News Publications; click title links to access the Browse Section Articles page; click the Add Article button or a content Properties link; and click the Associated Image link on the Content Properties page).

**Web Site URL Properties**

---

**Associated Image**

An Associated Image will display along with the content when the content is viewed.

Oracle OpenWorld 2009

**Associated Image Details**

**Image Type:** Image Upload JPG



**Image Title:** Upload Image for PeopleSoft 2000 Conferences: Americas

**Image ID:** 1051

**Image Origin:** News Publications

Associated Image page

**Change Image**

Click to access the Select Associated Image page, where you can associate an existing image with the article.

See [Chapter 7, "Setting Up and Working With News Publications," Associating Existing Images with News Articles, page 218.](#)

**Add New Image**

Click to access the Add Associated Image page, where you can add a new image to the article.

**Remove Image**

Click to remove an existing image that is currently displayed with article.

## Associating New Images with News Articles

Access the Add Associated Image page (select Content Management, News Publications, Browse News Publications; click title links to access the Browse Section Articles page; click the Add Article button or a content Properties link; click the Associated Image link on the Content Properties page; click the Add New Image button).

### Web Site URL Properties

## Add Associated Image

Create a new image to associate with the content. The image is stored in the system upon clicking 'Save New Image.' To change or remove an uploaded or file image, cancel the new image.

Oracle OpenWorld 2009

#### Add New Image Details

<b>*Image Title:</b>	Image: Oracle OpenWorld 2009	
<b>*Source:</b>	www.Oracle.com	
<b>*Summary:</b>	Associated Image for Oracle OpenWorld 2009	
<b>*Image Type:</b>	<input style="width: 90%;" type="text"/>	

Add Associated Image page

---

**Note.** News Publication image content can be deleted only from the Administer Content page. The image content does not appear in the Browse Publication pages because the image content is not considered an article, but is only associated with articles.

News Publication image content can also be accessed from the Maintain Content link on the search dialog. Use the advanced search to select the image content type.

---

**Image Title, Source, and Summary** Enter a title and the source.

The Image Title, Source, and Summary fields are derived from attributes of the associated news article. These default values might not be appropriate for the new image that you add to the Content Management system.

**Image Type** Use the drop-down list box to select the image type. Available options are:

- *Image Attachment*: Uses ftp to transfer the image file to the web server.
- *Image URL*: Uses an absolute or relative URL to locate the image file.
- *Image Upload JPG*: Stores a JPG image in the database as a blob (limited to 32 KB).

**Upload File** Click to upload the image attachment file.

**URL** Enter the URL to locate the image file.

If the image exists on the web, enter the web address. If the image exists on the web server, enter the absolute path, for example, */ps/images/portal\_pa/myimage.gif*.

**Save New Image** Click to save the added image as a content item stored in the top folder of the publication.

**Note.** Save the content when you return to the Content Properties page. If you do not save the content, the saved image is not associated with the article, but the image content is saved. You can update the image content using the Administer Content page.

Only users who have the *Delete Content* privilege on the News Publication top folder (where the image content is located) can associate an image with an article. This includes adding a new image or adding an existing image.

## Associating Existing Images with News Articles

Access the Select Associated Image page (select Content Management, News Publications, Browse News Publications; click title links to access the Browse Section Articles page; click the Add Article button or a content Properties link; click the Associated Image link on the Content Properties page).

**Web Site URL Properties**

**Select Associated Image**

Select one of the following images, then click OK. Save the content when you return to the content properties page.

Oracle OpenWorld 2009

Image Type:  ▼

Image Title:

Image Content					
	Image	Image ID	Title	Image Type	Origin
<input checked="" type="radio"/>		1406	Fire Alarm	Image URL	News Publications
<input type="radio"/>		1512	GBI Company Logo	Image URL	News Publications
<input type="radio"/>		1518	IP_CMPNY_PROMOTION.jpg	Image URL	News Publications
<input type="radio"/>		1028	Image: A Visitor's Guide to the San Francisco area	Image Upload JPG	News Publications
<input type="radio"/>		1027	Image: Distribution	Image Upload JPG	News Publications

Select Associated Image page

The list of available images is supplied from the News Publications and Managed Content, where the user has viewer privileges to the parent folder, and the parent folder has the *Content can be Published* option enabled.

**OK** Select one of the images and click this button to associate an existing Content Management image with the selected news article.

---

**Note.** Save the content when you return to the Content Properties page.

---

## Deleting News Publications

To delete a news publication, you must do some preparatory work first, including withdrawing or moving published articles and disallowing articles to be submitted from the pagelet if this option has been set.

---

**Note.** You must be a top administrator to be able to delete a publication in the News Publication feature.

---

Use the following procedure to delete a news publication:

1. Review the article status in each section of the publication.
2. Withdraw published articles, or move published articles to another publication.

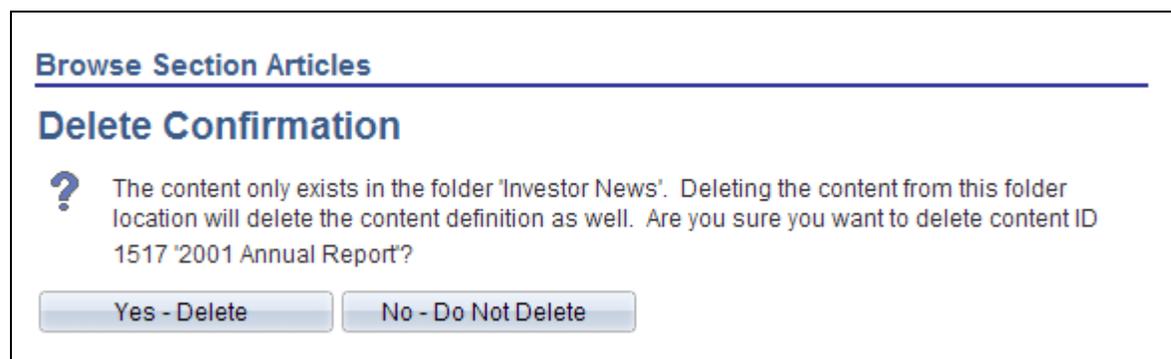
---

**Note.** An image associated with a published article also has a status of published. Withdrawing a published article does not change the published status of its associated image, which must be changed separately. However, moving a published article to another publication moves its associated image as well.

---

3. If the publication allowed articles to be submitted from the pagelet, then deselect this option on the Folder Properties page.
4. If the publication allowed articles to be submitted from the pagelet, then move or delete any submitted articles from the Submitted Articles folder.
5. Delete the publication from the Browse News Publications page.

This is an example of the Browse Section Articles - Delete Confirmation page, which is used to confirm the deletion:



Browse Section Articles - Delete Confirmation page

---

**Note.** The Delete Denied page appears if the delete cannot be performed. One or multiple conditions might prevent a delete. Only the first condition encountered is described in the error message.

---

## Managing News Articles

This section discusses how to:

- Manage news content items by status.
- Edit and view news articles.
- Share content.
- Publish news articles.
- Withdraw news articles.
- Create and use tags in news publications.
- Work with the My News Content pagelet.
- Choose top stories.

## Pages Used to Manage News Articles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My News Content Status	EPPCM_STAT_MAIN	Content Management, News Publications, My Content Status	View all articles that require your attention across all news publications. Articles are displayed by status: draft, pending publication, published, rejected, to be reviewed for publication, and requires rework.
My News Content	EPPCM_USER_MAIN	Content Management, News Publications, My Content Status  Click the content item status link on the My News Content Status page.	Review articles of a particular status, add new articles, and view content item property details.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Share Content	EPPCM_CONT_SHARE	Content Management, News Publications, Browse Publications  Click a title link to access the folder, and then click a Properties link to access the content properties page.  Click the Share Content link on the content properties page.	Convert content into a <i>Managed Content</i> origin type to make it accessible for use by other Content Management features.
Publish News Articles	EPPCM_PBLNW_MAIN	<ul style="list-style-type: none"> <li>Content Management, News Publications, Publish Articles, or</li> <li>Content Management, News Publications, My Content Status, Review for Publishing</li> </ul>	Select articles for publishing, rework, or rejection. This page lists articles pending publication in your assigned publication sections.
Unpublish News Articles	EPPCM_UPBLNW_MAIN	Content Management, News Publications, Unpublish Articles  Select a news publication.	Withdraw a published article and return it to pending status.
Choose Top Stories	EPPCM_CTSNW_MAIN	Content Management, News Publications, Choose Top Stories  Select a news publication.	Select published articles as the most prominent articles for the news publication as well as the most prominent stories by section. Top stories appear most prominently on the news publication's homepage pagelet and when you view the contents of a news publication.
Article Locations	EPPCM_CONT_LOC	Content Management, Browse Publications, Browse Publication Sections  Click the Properties link on the Browse Section Articles page.  Click the Locations link on the Content Properties page.	Select the locations where the article should be published. Also select whether the published article is to appear as a publication or section top story on the News Publication homepage pagelet.

## Managing News Content Items by Status

Access the My News Content Status page (select Content Management, News Publications, My Content Status).

My News Content Status		
Review the content items that require your attention. Click the Content Item Status to review content with that status.		
Content Status		
<a href="#">Content Item Status</a>	<a href="#">Status Description</a>	<a href="#">Total Items</a>
<a href="#">Draft Content</a>	Items in progress	0
<a href="#">Pending Publication</a>	Items you have submitted that are pending publication	4
<a href="#">Published Content</a>	Items that are currently published	35
<a href="#">Rejected Content</a>	Items the publisher rejected for publishing	1
<a href="#">Review for Publishing</a>	Items submitted to you to review for publishing	2
<a href="#">Requires Rework</a>	Items the publisher sent back for rework	0

My News Content Status page

**Content Item Status** Click a status link to access the My News Content page, where you can preview the content items for the selected status, view their property details, or add new articles.

---

**Note.** Enterprise Portal provides a My News Content homepage pagelet that provides easy access to the content items that require your attention.

---

## Editing and Viewing News Articles

Access the My News Content page (select Content Management, News Publications, My Content Status; click the content item status link on the My News Content Status page).

### My News Content

Review the current status of the content you have authored, submitted, or updated.

Add Article
[Search Content](#)

**Status:** Published Content
**Type:** All
 **Published in Last 30 Days**
Filter

Content List <span style="float: right; font-size: small;">Customize   Find   View All   First 1-25 of 43 Last</span>					
ID	Title	Location Path	Status	Publish	
1517	<a href="#">2001 Annual Report</a>	Investor Portal Promotions > Investor News	Published	11/01/2002	<a href="#">Properties</a>
1013	<a href="#">A Visitor's Guide to the San Francisco area</a>	Company News > Human Resources News	Published	12/12/2004	<a href="#">Properties</a>
1013	<a href="#">A Visitor's Guide to the San Francisco area</a>	Company News > Headline News	Published	09/02/2000	<a href="#">Properties</a>
1520	<a href="#">August 13, 2002 10-Q Quarterly Report</a>	SEC Filings > SEC Filings	Published	12/11/2002	<a href="#">Properties</a>
1519	<a href="#">August 22, 2002 8-K Announcement</a>	SEC Filings > SEC Filings	Published	12/11/2002	<a href="#">Properties</a>
1513	<a href="#">Aviation Aircraft Selects GBI's Advanced Design For New XBY Aircraft Engines</a>	Investor News > News Stories Headlines	Published	11/01/2002	<a href="#">Properties</a>
1003	<a href="#">Bring Your Parents to Work Day</a>	Company News > Headline News	Published	06/13/2000	<a href="#">Properties</a>
1022	<a href="#">Connect Conference</a>	Company News > Events	Published	09/01/2000	<a href="#">Properties</a>
1045	<a href="#">Enterprise Portal Prerelease Notes</a>	Company News > Headline News	Published	01/01/2002	<a href="#">Properties</a>
1514	<a href="#">GBI Announces Promotions</a>	Investor News > News Stories Headlines	Published	11/01/2002	<a href="#">Properties</a>
1515	<a href="#">GBI Announces The Acquisition of American Plastics</a>	Investor News > News Stories Headlines	Published	11/01/2002	<a href="#">Properties</a>
1512	<a href="#">GBI Company Logo</a>	Investor News	Published	11/01/2002	<a href="#">Properties</a>

**My News Content page**

Use this page to view all articles that you have authored, submitted, or updated. From this page you can edit, rework, resubmit, and add articles. You can edit all aspects of unpublished articles and modify summary information of published articles. You can narrow the list by indicating a particular type or status of content and those articles published in the last 30 days.

- Add Article**                      Select to add a new article to this section.
- Status**                                      Select to search articles with a status of *Draft*, *Pending*, *Published*, *Rejected*, *Rework*, or *All*.
- Type**    Select to search articles with a type of *File*, *Text/HTML*, *Web Site*, or *All*.
- Published in Last 30 Days**                      Select to limit your search to articles published within the last 30 days.
- Filter**    Click to limit the number of articles displayed on the page based on the values entered for the Status, Type, and Published in Last 30 Days fields.
- Location Path**                                      Displays the path to the article location.

---

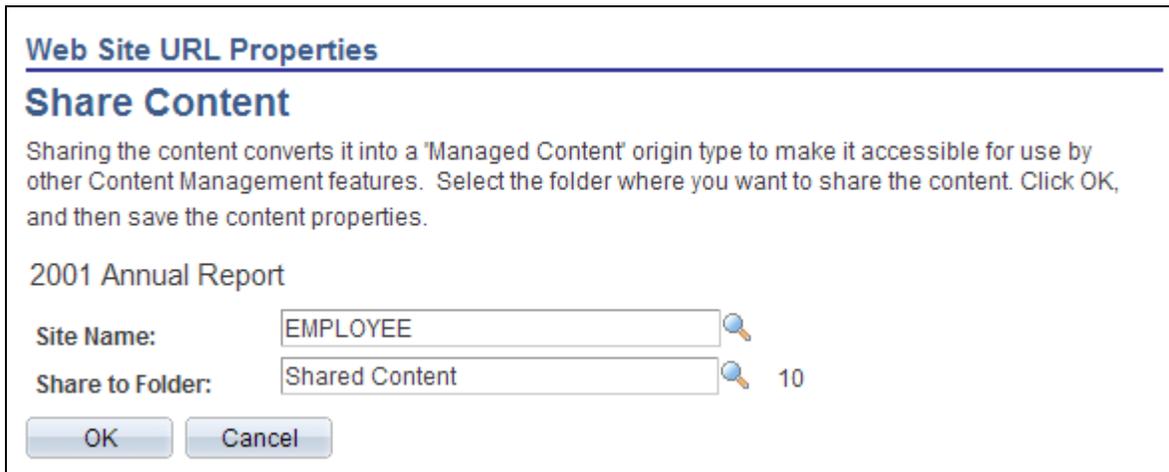
**Note.** Articles that are in multiple locations appear multiple times in the list.

---

<b>Status</b>	Displays the current publishing status of this article: <i>Draft, Pending, Publish, Reject, or Rework.</i>
<b>Note.</b> You can use the Status drop-down list box to search based on a selected status.	
<b>Publish</b>	Displays the date on which articles are scheduled to be published based on the folder properties for this section.
<b>Expire</b>	Displays the date on which articles are scheduled to expire based on the folder properties for this section.
<b>Properties</b>	Click to access the News Publications Properties page, where you can specify the type of content that you want to add to a section of a news publication. News publications support file attachments, managed content, text or HTML content creation, and website URLs.

## Sharing Content

Access the Share Content page (select Content Management, News Publications, Browse Publications; click a title link to access the folder, and then click a Properties link; click the Share Content link on the content properties page).



Share Content page

Sharing content converts it into a *Managed Content* origin type to make it accessible for use by other Content Management features. The content is placed in the system data folder *Shared Content* within the Managed Content feature, and marked as imported in the current feature. Unlike regular imported managed content, shared content remains editable from within the current feature as well as within the Managed Content feature. Sharing the content also enables version control for the content when accessed from the Managed Content feature.

To share content:

1. Click the Share Content link on the properties page.

---

**Note.** The Share Content link is available only for news content, workspaces, documents, and categorized content.

---

An example of the properties page is the Web Site URL Properties page.

2. On the Share Content page, select appropriate values and click the OK button.

---

**Note.** Until the content is published within the News Publication feature or Workspaces, if the content is deleted from Managed Content, the actual content is deleted, not just the location, because the origin of the content is now Managed Content.

PeopleSoft Content Management delivers a Managed Content top folder titled Shared Content. Content that is shared by means of the Share Content function is set to be copied to this folder by default. The default share folder is set on the feature definition. Only approved content can be shared. (News content is auto-approved.)

---

## Publishing News Articles

Access the Publish News Articles page (select Content Management, News Publications, Publish Articles).

### Publish News Articles

The following lists the articles pending publication in your assigned publication sections for the current site. After reviewing the article, select it for publishing, rework or rejection. Submitted articles must be removed from the 'Submitted Articles' section and placed in an appropriate section in order to publish them.

Select All     Clear All

Articles	ID	Article	Publication	Section	Publish	Expire	
<input type="checkbox"/>	1010	<a href="#">Internal Communication Survey Winners!</a>	Company News	Human Resources News	06/21/2000		<a href="#">Properties</a>
<input type="checkbox"/>	1010	<a href="#">Internal Communication Survey Winners!</a>	Company News	Information Technology News	06/21/2000		<a href="#">Properties</a>

Publish News Articles page

---

**Note.** Publishing, unpublishing, and choosing top stories can also be done directly in the Content Properties and Locations pages.

Submitted articles should be removed from the Submitted Articles section and must be placed in an appropriate section in order to publish them.

---

<b>Articles</b>	Select appropriate articles to publish or to take any other action. <hr/> <b>Note.</b> If the selection box for an article is unavailable, you cannot select this article to publish it or to take any other action. This article is in the system-generated Submitted Articles section, which indicates that the article was submitted by a user through the homepage pagelet of publication. Before you can publish this article, you need to move it to an appropriate section of the news publication using the Article Locations page.  To access the Article Locations page, click the Properties link of the article, and then click the Locations link. <hr/>
<b>Title</b>	Prior to taking an action on an article, click the title link to preview the article.
<b>Properties</b>	Click to view and modify article properties such as the viewers, associated image, locations, and so on.
<b>Publish</b>	Click to publish the selected articles to the News Publication pagelet according to the publish dates, location, and viewer details.
<b>Rework</b>	Click to send the selected articles back to their authors for rework.  Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken.  Authors can view articles sent for rework on the My News Content page or from the Requires Rework link on the My News Article page. After an article is reworked, it can be resubmitted for approval.
<b>Reject</b>	Click to reject selected articles.  If articles are rejected, they appear on the My News Content page of the author with a status of <i>Rejected</i> . Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken.

---

**Important!** Automated notifications are sent to the authors to notify them of any publishing status change of their articles.

---

## Withdrawing News Articles

Access the Unpublish News Articles page (select Content Management, News Publications, Unpublish Articles).

## Unpublish News Articles

The published articles for your assigned Publication Sections are listed below. To unpublish an article, select the article and click 'Unpublish'. Use the search criteria to filter the displayed articles. Click the article Title to preview the article. Click 'Properties' to access the article details.

Company News

Type:   Published in Last 30 Days

Published Articles							Customize	Find	View All	First	1-24 of 24	Last
<input type="checkbox"/>	ID	Article	Section	Publish	Expire							
<input type="checkbox"/>	1042	<a href="#">HRMS Customer Success Stories</a>	Human Resources News	01/01/2002								<a href="#">Properties</a>
<input type="checkbox"/>	1025	<a href="#">Nominate your favorite PS employee</a>	Events	09/11/2000	09/27/2010							<a href="#">Properties</a>
<input type="checkbox"/>	1024	<a href="#">Hot Talks: Free Tuition</a>	Events	09/01/2000	09/22/2010							<a href="#">Properties</a>
<input type="checkbox"/>	1023	<a href="#">Sale on Financials</a>	Events	09/07/2000	09/21/2010							<a href="#">Properties</a>
<input type="checkbox"/>	1022	<a href="#">Connect Conference</a>	Events	09/01/2000								<a href="#">Properties</a>
<input type="checkbox"/>	1021	<a href="#">Save the Date to Celebrate</a>	Events	01/01/2000								<a href="#">Properties</a>
<input type="checkbox"/>	1014	<a href="#">Current Job Openings</a>	Human Resources News	08/14/2000								<a href="#">Properties</a>
<input type="checkbox"/>	1013	<a href="#">A Visitor's Guide to the San Francisco area</a>	Headline News	09/02/2000								<a href="#">Properties</a>
<input type="checkbox"/>	1013	<a href="#">A Visitor's Guide to the San Francisco area</a>	Human Resources News	12/12/2004								<a href="#">Properties</a>

### Unpublish News Articles page

**Note.** You might want to enter a note in the Comments section of the content properties to inform the author why this action was taken.

The page automatically refreshes when you select filter criteria.

- Unpublish** Click to return the selected articles to the status of pending publication.  
Enter a note in the Comments section of the Content Properties page to inform the authors why this action was taken.
- Type** Select an article type to limit the list to articles of that type only.
- Published in Last 30 Days** Select this option to display only articles published within the last 30 days.
- Published Articles** Use the check boxes to select the articles that you want to unpublish.

## Creating and Using Tags in News Publications

Tags for news publications are displayed on the properties pages as well as the view page for the content. However, some types of content—such as attachments and URLs—open the content in a new window directly without using the application view page. In these instances, tags are available only on the properties page. Application pages can be displayed only in *edit* or *view* mode.

To create and use tags for news publications:

1. Access the pages using one of the following navigations:
  - Select Content Management, News Publications, Browse Publications.
  - Select My Content, My News Content.
2. Select the content property link to view the content.
3. Click an appropriate link to view, edit, or add a tag.
4. Enter the tag name, and click the Update Tags button.

Pagelet Wizard news publications—for example, Company News—display tags for top stories only. The number of tags to display for each story should be limited to three due to limited screen space.

---

**Note.** Security considerations: All users who have access to the content will have the add and view tag permissions. Users who are assigned the Administrator, Manager, or Publisher role will also be given modify permissions.

---

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Tags."

## Working with the My News Content Pagelet

Access the My News Content pagelet (click the Content link on the menu bar on the homepage, and then select the My News Content option in the Personalize Content page).



My News Content	
<b>Article Status</b>	
<a href="#">Draft Content</a>	0
<a href="#">Pending Publication</a>	3
<a href="#">Published Content</a>	34
<a href="#">Rejected Content</a>	1
<a href="#">Review for Publishing</a>	2
<a href="#">Requires Rework</a>	0

My News Content pagelet

The My News Content pagelet provides an alternate access path to the My News Content page and to the Publish News Articles page. The Personalize Content page enables you to select the pagelets that you want to appear on your homepage. Optionally, you can personalize the name of your homepage tab and add a welcome message.

**Article Status**

Displays the same information that is in the My News Content Status page.

Click a content status link to access the My News Content page, where you can access the news content item in the selected status.

- **Draft Content:** Click to view all draft of new content.
- **Submitted Content:** Click to view news content that you have submitted for approval that is not yet approved.
- **Published Content:** Click to view news content that has been published.
- **Rejected Content:** Click to view news content that you have submitted for approval that has been rejected.
- **Review for Publishing:** Click to view news content items submitted to you for approval and publication.
- **Requires Rework:** Click to view news content items that are returned to you from an approver who has requested that you rework the content.

The number adjacent to the content status link indicates the number of content items in the folder.

**Choosing Top Stories**

Access the Choose Top Stories page (select Content Management, News Publications, Choose Top Stories).

### Choose Top Stories

Publication Top Stories are displayed at the top of the publication pagelet on the homepage. Section Top Stories are displayed in the center column when viewing the publication section. The display order determines the numeric order in which the Top Story articles appear. Publication Top Stories should have an image associated them. Click the article title to preview the article. Click 'Properties' to access the article details and the article's associated image.

Company News

Save

Published Articles								Customize	Find	View All	First	1-22 of 22	Last
ID	Article	Section	Publish	Publication Top Story	Section Top Story	Display Order							
1001	 <a href="#">Grand Opening in Milano</a>	 <a href="#">Headline News</a>	06/13/2000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<a href="#">Properties</a>						
1003	 <a href="#">Bring Your Parents to Work Day</a>	<a href="#">Headline News</a>	06/13/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1004	 <a href="#">Get the Weather Report</a>	<a href="#">Headline News</a>	06/13/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1005	 <a href="#">SchoolHouse Rocks</a>	<a href="#">Headline News</a>	06/13/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1007	 <a href="#">Get Driving Directions</a>	 <a href="#">Headline News</a>	06/13/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1008	 <a href="#">Top 10 List</a>	<a href="#">Headline News</a>	06/13/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1011	 <a href="#">PeopleSoft Ships Industry's First Pure Internet eBusiness Software</a>	<a href="#">Headline News</a>	07/03/2000	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Properties</a>						
1013	 <a href="#">A Visitor's Guide to the San Francisco area</a>	 <a href="#">Headline News</a>	09/02/2000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	<a href="#">Properties</a>						
1007	 <a href="#">Get Driving Directions</a>	 <a href="#">Human Resources News</a>	06/13/2000	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Properties</a>						

Choose Top Stories page

**Article**

Click the Article link for an article to preview the article.



The Image icon indicates that the article has an associated image.

Click to preview the associated image as well as get the information of the associated image.

**Publication Top Story**

Select to place the article in the publication's top story section, at the top of the pagelet.

**Note.** Publication top stories should have associated images. If you publish the top story without associating an image, the article appears in the News Publication pagelet with a blank space in the column where the image would ordinarily be located, resulting in an odd-looking layout.

**Section Top Story**

Select to place an article in the 3-column display when a section is clicked.

You can navigate to the section page by clicking the section title on the pagelet.

**Display Order**

Enter the numeric order of appearance.

Publication top stories are displayed at the top of the publication pagelet on the homepage. Section top stories are displayed in the center column when you are viewing the publication section. The display order determines the numeric order in which the top story articles appear. Publication top stories should have an image associated with them.

**Properties**

Click to access the article details and the article's associated image.

---

## Administering News Content

This section discusses how to administer news content.

Access the Administer News Content page (EPPCM\_ADMN\_MAIN) (select Content management, News Publications, Administer Content).

### Administer News Content

News content consists of articles and Images. This page bypasses the Privilege Set security for deleting and unpublishing News content. Use the search criteria to filter the displayed news content. Click the content Title to preview the content. Click 'Properties' to access the content details. Click 'Delete' to remove the content from all News Publications. Click 'Unpublish' to unpublish the content from all News Publications. Click 'Remove' to remove the associated image from all News Articles. (Inactivated or expired content is not listed here.)

[Search Content](#)

Type:  
Origin:

Content List		Customize   Find   View All       First 1-12 of 12 Last						
ID	Title	Origin	Modified By	Modified				
1406	<a href="#">Fire Alarm</a>	News	SAMPLE	01/16/03	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1512	<a href="#">GBI Company Logo</a>	News	VP1	12/02/02	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1518	<a href="#">IP_CMPNY_PROMOTION.jpg</a>	News	VP1	12/13/02	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1028	<a href="#">Image: A Visitor's Guide to the San Fransisco area</a>	News	VP1	12/12/04	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1027	<a href="#">Image: Distribution</a>	News	VP1	10/23/04	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1019	<a href="#">Image: Financials / Sales</a>	News	SAMPLE	01/07/03	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
2010	<a href="#">Image: Oracle OpenWorld 2009</a>	News	VP1	07/21/09	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1029	<a href="#">Image: PeopleSoft Italy Planning 'Magical' June 22nd launch</a>	News	VP1	12/12/04	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1026	<a href="#">Image: Save the Date to Celebrate</a>	News	VP1	10/23/04	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1020	<a href="#">Image: Services</a>	News	SAMPLE	01/07/03	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	
1405	<a href="#">Road Work</a>	News	SAMPLE	01/16/03	<a href="#">Properties</a>	<input type="button" value="Remove"/>	<input type="button" value="Delete"/>	

### Administer News Content page

Use this page to bypass privilege set security to preview content, view content property details, remove content, or unpublish content from all news publications.

---

**Note.** Archived or expired content is not listed on this page.

---

<b>Add Article</b>	Click to add a new article to this section.
<b>Filter</b>	Click to limit the number of articles displayed on the page based on the values entered for the Type and Origin fields.
<b>Title</b>	Click to preview the content details.
<b>Properties</b>	Click to access the content property details.
<b>Origin</b>	Displays where the article originated: <ul style="list-style-type: none"> <li>• <i>News</i> indicates the article was created from the News Publications feature.</li> <li>• <i>Managed</i> indicates articles that were imported from Managed Content.</li> </ul>
<b>Unpublish and Expire</b>	Click to unpublish the content from all news publications. Unpublishing the content does not remove it from the news sections. It remains available for future publishing or deletion.
<b>Remove</b>	Click to remove the associated image from all news articles. Removing the image removes it from any news article. It does not delete it from the Content Management system.
<b>Delete</b>	Click to remove the content from all news publications. Deleting the article permanently deletes it from the Content Management system if its origin is News Publication. If it is imported managed content, deleting it removes only the News Publication locations and not the content item itself. See <a href="#">Chapter 7, "Setting Up and Working With News Publications," Administering News Content, page 231.</a>

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## Publishing News Publications

This section provides an overview of methods to publish News Publications and discusses how to:

- Publish a pagelet from a news publication.
- Publish a news publication from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.
- Publish a news publication as a feed.

## Understanding Methods to Publish News Publications

Two methods are available to publish a news publication:

1. Use the Publish Pagelet Wizard Definition page.

You use the Publish Pagelet Wizard Definition page to publish a news publication as a pagelet to a site or portal. News publication publishing features include:

- The pagelet folder in which the news publication will be available.
- The homepage tabs on which the pagelet will be available.
- The pagelet behavior (optional, optional-default, required-fixed, or required).

2. Use the Pagelet Wizard pages.

The Pagelet Wizard guides you through six steps to create or update a News Publication homepage pagelet.

- Step 1: Specify pagelet information.
- Step 2: Select data source.
- Step 3: Specify data source parameters.
- Step 4: Select display format.
- Step 5: Specify display options.
- Step 6: Specify publishing options.

## Pages Used to Publish News Publications as Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publications Properties - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	<ul style="list-style-type: none"> <li>• Content Management, News Publications, Browse Publications</li> </ul> <p>Click the Properties link for the news publication.</p> <p>Click the Publish as Pagelet link on the Folder Properties page.</p> <ul style="list-style-type: none"> <li>• Click the Add Pagelet button or the Edit button on the Publications Properties - Publish as Pagelet page.</li> </ul>	Create a pagelet definition for news publications.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Preview Pagelet	EPPPB_PGLT_PREVIEW	Click the Preview Pagelet link on the Publications Properties - Publish Pagelet Wizard Definition page.	Preview a list pagelet.
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	<ul style="list-style-type: none"> <li>Click the Go to Pagelet Wizard link on Publications Properties - Publish Pagelet Wizard Definition page.</li> <li>Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard</li> <li>PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard</li> <li> Click the Pagelet Information button from any page in the wizard.</li> </ul>	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Pagelet Information page.</li> <li> Click the Data Type button from any page in the wizard.</li> </ul>	Select the type of data source for the pagelet.
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Select Data Source page.</li> <li> Click the Data Source Parameters button from any page in the wizard.</li> </ul>	<p>Configure the data source parameters that are required for data to be displayed in the pagelet.</p> <p><b>Note.</b> This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet.  <b>Note.</b> This page is accessible only for data source parameters for which you have selected the <i>User Specified</i> or <i>Admin Specified</i> usage types.
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page.</li> <li> Click the Display Format button from any page in the wizard.</li> </ul>	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options (custom format)	PTPPB_WIZ_DISP_CUS	<ul style="list-style-type: none"> <li>Select <i>Custom</i> as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.</li> <li> Click the Transformation button from any page in the wizard.</li> </ul>	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	<ul style="list-style-type: none"> <li>Click the Next button on the Pagelet Wizard - Specify Display Options page.</li> <li> Click the Register Pagelet button from any page in the wizard.</li> </ul>	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Publications Properties - Publish as Pagelet	EPPCM_CATG_PGLT	<ul style="list-style-type: none"> <li>Click the Publish button on the Publications Properties - Publish Pagelet Wizard Definition page.</li> <li>If this action item list has already been published as a pagelet, click the Publish as Pagelet link on the Folder Properties page.</li> </ul>	Administer pagelet definitions for an action item list.
Publish to Multiple Portals	PTPP_PMPUBPRTL	<ul style="list-style-type: none"> <li>Click the Publish Pagelet in Other Sites link on the Publications Properties - Publish Pagelet Wizard Definition page.</li> <li>Portal Administration, Pagelets, Publish Pagelets</li> <li>PeopleTools, Portal, Portal Utilities, Publish Pagelets</li> </ul>	Publish the pagelet definition to additional portals and sites.
Publish Multiple Pagelets	PTPP_PMPUBPGLT	<ul style="list-style-type: none"> <li>On the Publish to Multiple Portals page, select the Publish Multiple Pagelets tab.</li> <li>Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets</li> <li>PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets</li> </ul>	Publish multiple pagelet definitions to another portal or site.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publications Properties - Advanced Feed Options	EPPCM_FEED_ADVOPT	<p>Content Management, News Publications, Browse Publications</p> <p>Click the Properties link.</p> <p>Click the Publish as Feed link on the Folder Properties page.</p> <p>Click the Add Feed button or the Edit button on the Publications Properties - Publish as Feed page.</p> <p>Click the Advanced Options link on the Publications Properties - Publish Feed Definition page.</p>	<p>Set up advanced options to publish a news publication in the content management system so that it is accessible as a feed.</p>

## Publishing a Pagelet from a News Publication

Access the Publications Properties - Publish Pagelet Wizard Definition page (select Content Management, News Publications, Browse Publications; click the Properties link in the Browse News Publication page; click the Publish as Pagelet link on the Folder Properties page; select a content type, and click the OK button on the Publish as Pagelet page).

### Publications Properties

## Publish Pagelet Wizard Definition

Set the values to create or update a Pagelet Wizard pagelet definition for this item.

**Pagelet**

\*Pagelet Title:

Description:

\*Pagelet Folder:

**Pagelet Security**

Publish as Public

Publish with Security Roles

**Homepage Tabs** Customize | Find | View All | | | First 1-4 of 4 Last

Select	Homepage Tab	*Pagelet Behavior	
<input type="checkbox"/>	Administration	Optional	
<input checked="" type="checkbox"/>	My Page	Optional - Default	<a href="#">Go to Layout</a>
<input checked="" type="checkbox"/>	Guest	Required	<a href="#">Go to Layout</a>
<input type="checkbox"/>	Investor	Optional	

[Preview Pagelet](#)
[Go to Pagelet Wizard](#)
[Publish Pagelet in Other Sites](#)

Publications Properties - Publish Pagelet Wizard Definition page

**Pagelet**

The pagelet title and description from the Folder Properties page appear in the pagelet section. You can edit these two fields as necessary.

**Pagelet Title**                      Enter the pagelet title that will identify the pagelet.

**Description**                        Enter a meaningful description for this pagelet.

**Pagelet Folder**                    Select a folder in which this news publication pagelet will be available. Only folders from the current site are available to select.

*See Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications, "Setting User Preferences."*

**Pagelet Security**

Select the security options for viewing the pagelet. Available options are:

- *Publish as Public*, which enables all users to view the pagelet.
- *Publish with Security Roles*, which uses the roles defined on the Folder Security page when publishing the pagelet.

---

**Note.** If no roles are defined on the Folder Security page, the system automatically selects to publish the pagelet as *Public*.

---

**Homepage Tabs**

Use the Homepage Tabs section to define the homepage tab labels and behavior for the pagelet.

**Homepage Tab**

Select the tabs that will display the pagelet.

**Pagelet Behavior**

Select the behavior options for the pagelet. The available options are:

- *Optional*

The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.

- *Optional-Default*

The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. Do not use this setting for guest homepage pagelets because guest users do not have personalization privileges.

- *Required-Fixed*

The pagelet will appear on all user homepages if users have access to the pagelet. The placement of the pagelet cannot be changed, and the pagelet cannot be removed from the homepage.

- *Required*

The pagelet will appear on all user homepages if the user has access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

**Publish**

Click to display the Publish as Pagelet page, where you can review or edit the pagelet definition.

See [Chapter 4, "Setting Up and Working With Managed Content," Publishing a Folder as a Pagelet, page 97.](#)

## Publishing a News Publication from Pagelet Wizard

Pagelets for news publication can be created and published using Pagelet Wizard and then managed from the Folder Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note.** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a folder as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard."

### **Step 1: Entering Pagelet Identifying Information**

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Publications Properties - Publish Pagelet Wizard Definition page).

**Pagelet Wizard** **Step 1 of 6**

1 2 3 4 5 6 Next >

### Specify Pagelet Information

The following information will be used to identify and categorize your pagelet.

**Pagelet Information**

**Pagelet ID:** PAPP\_SEC\_FILINGS

**\*Pagelet Title:**

**Description:**

**Owner ID:**  ▼

**Category ID:**  ▼

**Help URL:**

Pagelet Wizard - Specify Pagelet Information page

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

**Step 2: Selecting a Pagelet Data Type**

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).

Pagelet Wizard - Select Data Source page (News Publications data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

### Data Type

Use the *News publications* data type (NEWS PUBLICATION) to make a Pagelet Wizard pagelet a publishing vehicle for content from a news publication. News publication data source pagelets are compatible with the custom display format.

If you select the *News publications* option, the Publication ID and Publication Name fields appear.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 2: Selecting a Pagelet Data Type.

### Publication ID

Select the news publication that you want to use as the data source for the pagelet. Available news publications are created in the News Publications component.

### Publication Name

Displays the name of the news publication.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 2: Selecting a Pagelet Data Type.

## Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *News Publications* as the data type on the Pagelet Wizard - Select Data Source page, and click the Next button).

**Pagelet Wizard**
**Step 3 of 6**

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2
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4
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< Previous
Next >

## Specify Data Source Parameters

Specify the parameters and their associated options specific to the data source you have selected for your pagelet. Rows showing a selected 'Required' require a Default Value.  
SEC Filings

Field Name	Description	*Usage Type	Required	Default Value	
.SHOW_TS_IMAGES	Show Top Story I	Fixed	<input checked="" type="checkbox"/>	Y	<a href="#">Values</a>
.SHOW_SECTION_LINKS	Show Section Li	Fixed	<input checked="" type="checkbox"/>	Y	<a href="#">Values</a>
.SHOW_FEED_LINKS	Show Feed Link	Fixed	<input checked="" type="checkbox"/>	Y	<a href="#">Values</a>
.NUM_ARTICLES	Number of Article	User Specified	<input checked="" type="checkbox"/>	3	<a href="#">Values</a>

**Personalization Instructions**

Specify the text that should appear on the personalization page for this pagelet.

**Text:**

Reset to Default

Pagelet Wizard - Specify Data Source Parameters page (News Publication data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

**Field Name**

Displays the name of the data source parameter.

- *.SHOW\_TS\_IMAGES*: Set the Default Value field to *Y* if you want the pagelet to display images for top stories for the news publication.
- *.SHOW\_SECTION\_LINKS*: Set the Default Value field to *Y* if you want the pagelet to display links to sections in the news publication.
- *.SHOW\_FEED\_LINKS*: Set the Default Value field to *Y* if you want the pagelet to display feed links.
- *.NUM\_ARTICLES*: Set the Default Value field to the number of articles that you want the pagelet to display.

**Description**

Displays a description of the data source parameter.

**Usage Type**

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the **Configure** link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.

If you change the usage type from or to *Context Sensitive* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

For example, suppose that you specify *%UserId* as the system variable for a parameter name *User*. When the pagelet appears on a user's homepage, the *User* field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.

- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the **Customize** button appears on the pagelet title bar.

End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items," Specifying Prompt Values for Data Source Parameters.

If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

**Required**

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

**Default Value**

You can enter a value that includes the % and \* wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date*.

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items," Specifying Prompt Values for Data Source Parameters.

**Text**

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

---

**Note.** Personalization instructions must be translatable.

---

**Specifying Prompt Values for Data Source Parameters**

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).

**Pagelet Wizard**  
**Specify Data Source Parameter Values**

List the parameter values available for a user to select for the Data Source Parameter Name.

Field Name: .SHOW\_TS\_IMAGES      Show Top Story Images

Parameter Values			
Parameter Value	Description	Default	
1 N	No	<input type="checkbox"/>	
2 Y	Yes	<input checked="" type="checkbox"/>	

OK      Cancel

Pagelet Wizard - Specify Data Source Parameter Values page (News Publications data source)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

**Parameter Value**      Specify the parameter value.

**Description**      Provide an optional description of the parameter value.

**Default**      Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 3: Specifying Data Source Parameters.

#### **Step 4: Selecting a Pagelet Display Format**

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

**Pagelet Wizard**
**Step 4 of 6**

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## Select Display Format

Select the format in which you would like your pagelet data rendered.

SEC Filings

Specify Display Options
First 1 of 1 Last

	Display Format	Name	Description
<input checked="" type="radio"/>		Custom	Specify your own custom display transformation (XSL template) for your pagelet

### Pagelet Wizard - Select Display Format page

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

**Custom**                      Select to specify a custom display transformation (XSL template) for your pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

### **Step 5: Specifying Pagelet Display Options**

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page).

**Pagelet Wizard**
**Step 5 of 6**

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Next >

## Specify Display Options

Specify the visual options related to the display format for your pagelet.

### SEC Filings

**Custom Options**

XSL Template: News Publication ▼

Generate

XML: 
 <?xml version="1.0"?>
 <news-publication-result id="955"
 portal="EMPLOYEE"><news-publication-
 top-story/><news-required-section-
  ▼

XSL: 
 <?xml version="1.0" encoding="UTF-8"?>
 <!--
 Description: XSL T supplied with the
  ▼

**Additional Text**

Header: PeopleSoft Logo ▼

Opening Text:   ▼

Closing Text:   ▼

Footer: Powered by PeopleSoft ▼

**Search Options**

Search is supported for homepage pagelets and embeddable pagelets only.

\* Search Box: No Search Box ▼

▶ Custom Search Class

**Pagelet Preview**

ORACLE

SEC Filings

- [August 22, 2002 8-K Announcement](#)
- [August 13, 2002 10-Q Quarterly Report](#)
- [January 13, 2002 10-K Annual Report for 2001](#)

[More...](#)

Feed ▼

[View All Articles and Sections](#)

### Pagelet Wizard - Specify Display Options page

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

**Note.** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

## Step 6: Specifying Pagelet Publication Options

Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

**Pagelet Wizard**
**Step 6 of 6**

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### Specify Publishing Options

Specify the manner in which your pagelet is published.

#### SEC Filings

**Homepage Pagelet**  
 Publishing as a Homepage Pagelet allows this pagelet to be placed on a user's Homepage tab. Homepage Pagelets are organized by pagelet folders.  
 Folder:  v  

▶ Advanced Options  
▶ WSRP Options

**Template Pagelet**  
 Publishing as a Template Pagelet allows this pagelet to be used with any template. For the Context Manager template, this pagelet can be context sensitive to the target transaction.  

▶ Advanced Options  
▶ WSRP Options

**Embeddable Pagelet**  
 Publishing as an Embeddable Pagelet allows this pagelet to be rendered on a target transaction page. The target transaction executes this pagelet from the Pagelet Wizard API.

▼ Pagelet Security

\*Security Type:  v  Author Access

| *Type   | Name   | Description                   |                                  |                                  |
|---|--|-------------------------------|----------------------------------|----------------------------------|
| <input type="text" value="Permission List"/> <span style="font-size: 0.8em;">v</span> | <input type="text" value="PAPP1100"/> <span style="font-size: 0.8em;">🔍</span> | News Publication Pagelet      | <input type="button" value="+"/> | <input type="button" value="-"/> |
| <input type="text" value="Permission List"/> <span style="font-size: 0.8em;">v</span> | <input type="text" value="PAPP9000"/> <span style="font-size: 0.8em;">🔍</span> | All Enterprise Portal Objects | <input type="button" value="+"/> | <input type="button" value="-"/> |

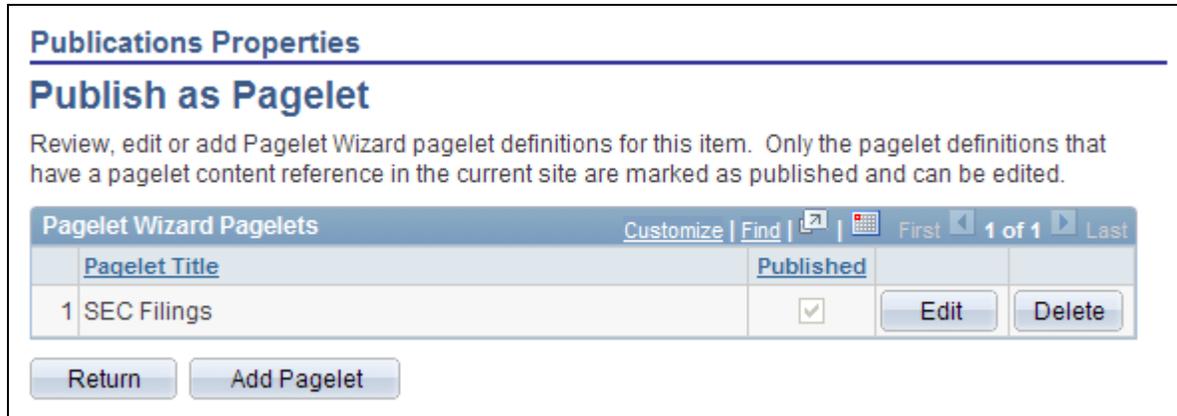
Pagelet Wizard - Specify Publishing Options page

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

## Editing a Published Pagelet

Access the Publications Properties - Publish as Pagelet page (click the Publish button on the Publications Properties - Publish Pagelet Wizard Definition page; or if this news publication has already been published as a pagelet, click the Publish as Pagelet link on the Folder Properties page).



Publications Properties - Publish as Pagelet page

Use the Publications Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this news publication. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

---

**Note.** Pagelets for this news publication published directly from Pagelet Wizard also appear in this list.

---

|                    |   |
|--------------------|---|
| <b>Published</b>   | Indicates the whether the pagelet is published.   |
| <b>Edit</b>        | Click to access the Publications Properties - Publish Pagelet Wizard Definition page, where you can edit pagelet definitions.                         |
| <b>Delete</b>      | Deletes this pagelet definition and the published pagelet content references in all sites.  |
| <b>Add Pagelet</b> | Click to access the Publications Properties - Publish Pagelet Wizard Definition page, where you can publish content as a pagelet to a site or portal. |

## Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the Publications Properties - Publish Pagelet Wizard Definition page).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.

Publish to Multiple Portals
Publish Multiple Pagelets

Publishing a pagelet entails copying it from the Source Portal to the Target Portal. Selecting a Target Portal where the pagelet already exists will overwrite the Target Portal's pagelet.

**Pagelet**

\*Source Portal:  Employee-facing registry content

Pagelet Type:  Homepage Pagelet  Template Pagelet

\*Pagelet Name:  SEC Filings

**Target Portals** Customize | Find | View All | First 1-6 of 6 Last

| Select                              | Portal Name     | Pagelet Exists As |  |
|-------------------------------------|-----------------|-------------------|--|
| <input type="checkbox"/>            | CUSTOMER        | SEC Filings       | <a href="#">Go to Tab Content / Layout</a> |
| <input type="checkbox"/>            | DEMOSITE        |                   |  |
| <input checked="" type="checkbox"/> | EMPLOYEE        | SEC Filings       | <a href="#">Go to Tab Content / Layout</a> |
| <input type="checkbox"/>            | PARTNER         | SEC Filings       | <a href="#">Go to Tab Content / Layout</a> |
| <input type="checkbox"/>            | PS_SITETEMPLATE |                   |  |
| <input type="checkbox"/>            | SUPPLIER        | SEC Filings       | <a href="#">Go to Tab Content / Layout</a> |

[Select All](#)  [Clear All](#)

Publish to Multiple Portals page

- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

Publishing a pagelet entails copying it from the Source Portal to the Target Portal. To overwrite pagelets that already exist in the Target Portal, use the Publish to Multiple Portals page.

**Pagelet Criteria**

\*Source Portal: EMPLOYEE Employee-facing registry content  
 \*Target Portal: SUPPLIER Supplier-facing registry content  
 Pagelet Type:  Homepage Pagelet  Template Pagelet  
 Pagelet Keyword:  Search Reset

**Pagelets** Customize | Find | View All | First 1-4 of 4 Last

| Select                   | Pagelet ID                | Title               |
|--------------------------|---------------------------|---------------------|
| <input type="checkbox"/> | ADMN_PARTNERS_HMPG        | Partners            |
| <input type="checkbox"/> | ADMN_REPORT_SECTIONS_HMPG | Report Sections     |
| <input type="checkbox"/> | PAPP_DEMO_FEATURE_POLL    | Demo Feature Poll   |
| <input type="checkbox"/> | PAPP_DEMO_FREQUENCY_POLL  | Demo Frequency Poll |

Select All  Clear All  
 Publish Selected Pagelets

Publish Multiple Pagelets page

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Working With Navigation Pages," Publishing Pagelets.

## Publishing a News Publication as a Feed

Access the Publications Properties - Advanced Feed Options page (select Content Management, News Publications, Browse Publications; click the Properties link; click the Publish as Feed link on the Folder Properties page; click the Add Feed button or the Edit button on the Publications Properties - Publish as Feed page; click the Advanced Options link from Publications Properties - Publish Feed Definition page.)

**Publications Properties**

**Advanced Feed Options**

Specify the advanced options of this feed.

Feed: Company News

**Feed Options**

\* Max Number of Entries:  (Enter 0 for unlimited number of entries.)

| Company News |                                     | Customize   Find   View All       | First  1-4 of 4  Last |
|--------------|-------------------------------------|---|---|
|              | Selected                            | Description   |   |
| 1            | <input checked="" type="checkbox"/> | Events  |   |
| 2            | <input type="checkbox"/>            | Headline News   |   |
| 3            | <input checked="" type="checkbox"/> | Human Resources News  |   |
| 4            | <input checked="" type="checkbox"/> | Information Technology News   |   |

Publications Properties - Advanced Feed Options page

**Max Number of Entries** (maximum number of entries) Specify the maximum number of feed entries that you want to display in the feed document.

**Selected** Select appropriate folders to be included in the feed.

**Reset to Defaults** Click to reset all parameters: Max Number of Entries is back to 10, and subfolder is *selected*.

**OK** Click to return to the Publications Properties - Publish Pagelet Wizard Definition page, and then click the Publish button to save and publish this content item as feed.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts."

---

## Viewing News Publications

This section discusses how to:

- View a news publication in a pagelet.
- View news publication details.
- View expired articles.

- View all articles and sections.
- Submit news articles.
- Update submitted news articles.

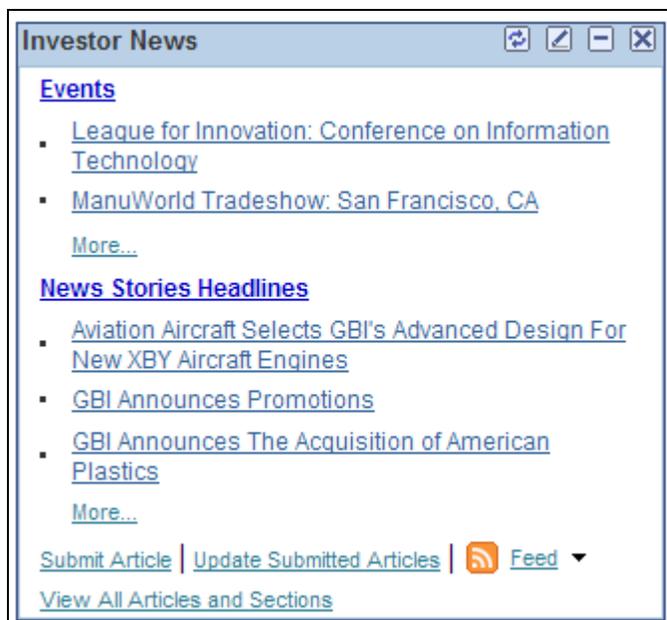
## Pages Used for Viewing News Publications

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---|------------------------|---|---|
| News Publication Details                | EPPCM_NWDSPSEC         | In the Homepage, click any section or article title link in the news publication pagelet—for example, Company News pagelet.   | View information in a focused format, incorporate news and images, and designate top stories to emphasize content.                          |
| View All Articles and Sections          | EPPCM_NWDSPALL         | <ul style="list-style-type: none"> <li>• In the Homepage, click any section or article title link in the news publication pagelet—for example, Company News pagelet.</li> </ul> <p>Click the View All Article and Sections link in the News Publication Details page.</p> <ul style="list-style-type: none"> <li>• Alternatively, click the View All Article and Sections link in the Investor News pagelet.</li> </ul> | View all active articles and sections of the selected news publication pagelet.   |
| View Expired Articles                   | EPPCM_NWDSPARC         | In the Homepage, click any section or article title link in the news publication pagelet—for example, Company News pagelet.   | View all expired news publications that have become inactive.   |
| Submit News Articles - Add News Article | EPPCM_ADDCONT_SEC      | <ul style="list-style-type: none"> <li>• My Content, Submit News Article</li> <li>• In the Homepage, click the Submit Articles link in the news publication pagelets.</li> </ul>  | Select the type of content to add.<br><br><b>Note.</b> Select Managed Content to import existing content into the News Publication feature. |

| <b>Page Name</b>     | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------|------------------------|--|---|
| Submit News Articles | EPPCM_SBMTNW_MAIN      | <ul style="list-style-type: none"> <li>• My Content, Submit News Article</li> <li>• In the Homepage, click the Update Submitted Articles link in the news publication pagelets.</li> </ul> | View basic information about the articles within a section and drill down to article details. Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles. |

## Viewing a News Publication in a Pagelet

View the Investor News pagelet (click the Content link from the menu bar on the Homepage, and then select any news publication option in the Personalize Content page).



Investor News pagelet

### <News title links>

Click to access the News Publication Details page, where you can view the details of each news publication.

### Submit Article

Click to access the Submit News Articles - Add News Article page, where you can select the type of content to add.

See [Chapter 7, "Setting Up and Working With News Publications," Submitting News Articles, page 258.](#)

**Update Submitted Articles**

Click to access the Submit News Articles page, where you can view and edit basic information about the articles within a section and drill down to article details.

**Note.** Depending upon article status and member privileges for the section, you can add, edit, delete, or view articles.

See [Chapter 7, "Setting Up and Working With News Publications," Submitting News Articles, page 258.](#)

**Feed**

Click to open the feed for this item, if available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Feeds and Alerts."*

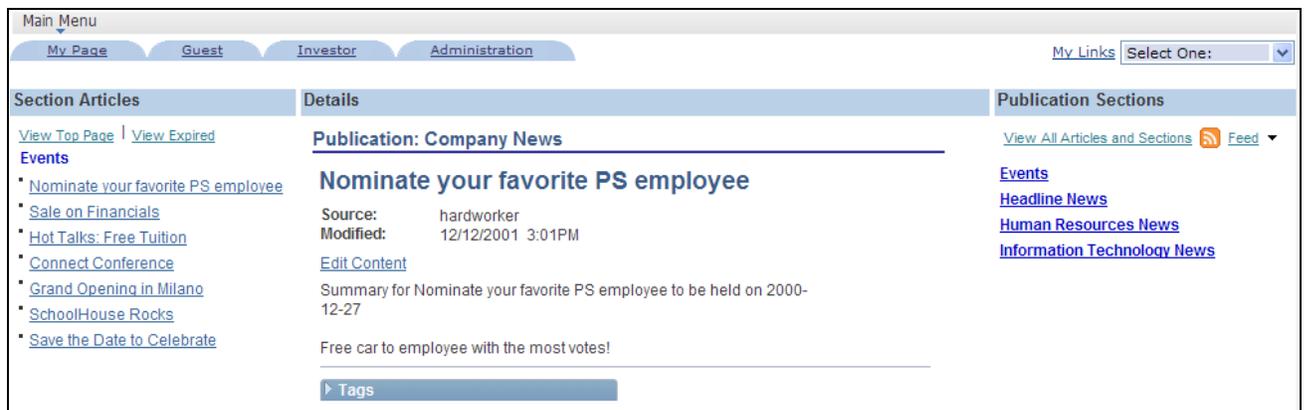
**View All Articles and Sections**

Click to access the View All Articles and Sections page, where you can view all active articles and sections of the selected news publication pagelet.

See [Chapter 7, "Setting Up and Working With News Publications," Viewing All Articles and Sections, page 257.](#)

## Viewing News Publication Details

Access the News Publication Details pagelet (in the Homepage, click any section or article title link in the news publication pagelets).



News Publication Details page

**My Links**

Click to access the View My Links page, where you can view all of your saved links.

**View Top Page**

Click to view published articles that appear more prominently on the News Publication homepage pagelet.

**View Expired**

Click to view all expired news publications that have become inactive.

|                                   |  |
|-----------------------------------|--|
| <b>Edit Content</b>               | Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location.<br><br>See <a href="#">Chapter 2, "Setting Up the Content Management System," Setting Feature Definitions, page 33.</a>                                   |
| <b>Tag</b>                        | Click to expand and access the content properties to view or edit tags.<br><br>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Tags."</i>   |
| <b>View Articles and Sections</b> | Click to access the View All Articles and Sections page, where you can view all active articles and sections of the selected news publication pagelet.<br><br>See <a href="#">Chapter 7, "Setting Up and Working With News Publications," Viewing All Articles and Sections, page 257.</a> |
| <b>Feed</b>                       | Click to open the feed for this publication, if available.<br><br>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features, "Working With Feeds and Alerts."</i>  |

## Viewing Expired Articles

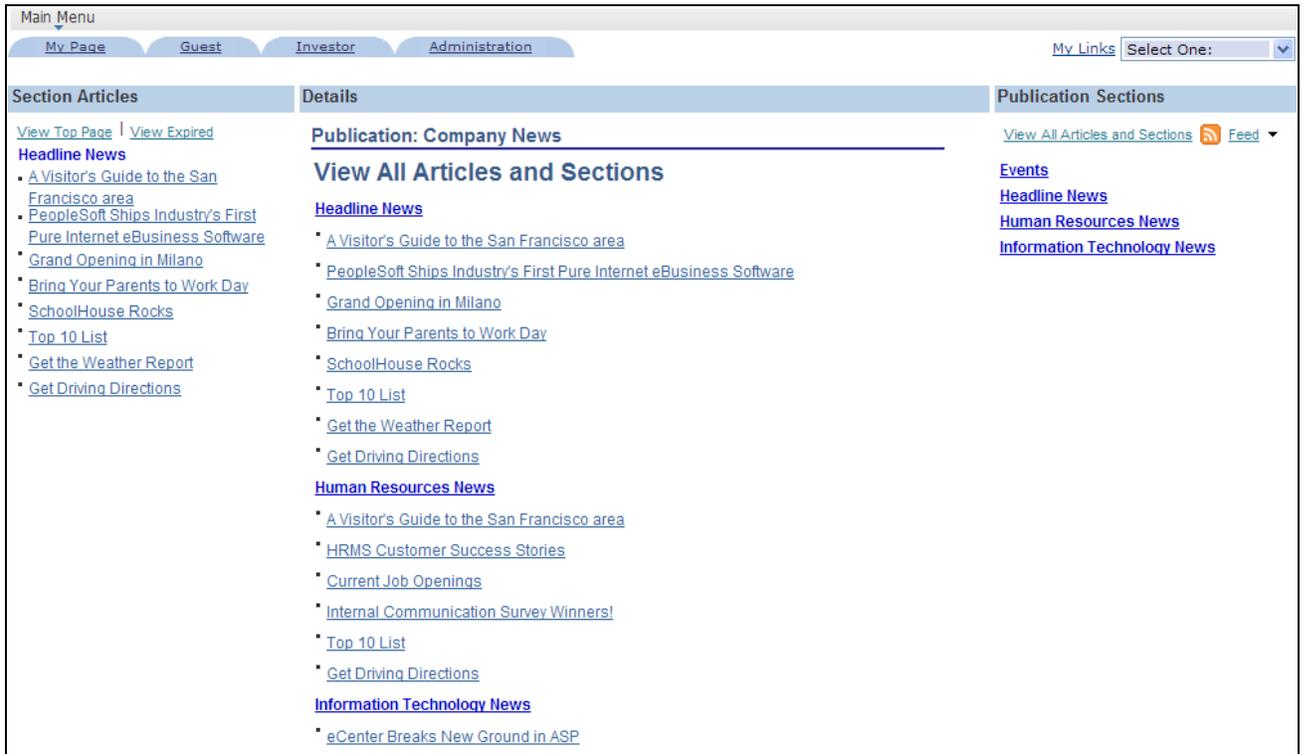
Access the View Expired Articles page (in the Homepage, click any section or article title link in the news publication pagelets; click the View Expired link on the News Publication Details page).



View Expired Articles page

## Viewing All Articles and Sections

Access the View All Articles and Sections page (in the Homepage, click any section or article title link in the news publication pagelets; click the View All Articles and Sections link on the News Publication Details page).



View All Articles and Sections page

## Submitting News Articles

Access the Submit News Articles - Add News Article page (in the Homepage, click the Submit Articles link in the news publication pagelets).



Submit News Articles - Add News Article page

**Content Type**

Select a content type of submitted articles to add to news publications. Available options are:

- *File Attachment*
- *Text or HTML*
- *Web Site URL*

**Updating Submitted News Articles**

Access the Submit News Articles page (in the Homepage, click the Update Submitted Articles link in the news publication pagelets)

### Submit News Articles

News articles consist of File Attachments, HTML Text or Web Site Urls. Click 'Add Article' to create a News article. Use the search criteria to filter your authored articles. Click the content Title to preview the article. Click 'Properties' to access the article details.

Add Article
[Properties](#)   [Search Content](#)

Status: Published  
 Type: All  
 Published in Last 30 Days  
Filter

| Content List |  |         |  |           |            |                            | Customize   Find   View All    First 1-17 of 17 Last |
|--------------|--|---------|--|-----------|------------|----------------------------|--|
| ID           | Title  | Origin  | Location Path                              | Status    | Publish    |                            |  |
| 1517         | <a href="#">2001 Annual Report</a>   | News    | Investor Portal Promotions > Investor News | Published | 11/01/2002 | <a href="#">Properties</a> |  |
| 1520         | <a href="#">August 13, 2002 10-Q Quarterly Report</a>  | News    | SEC Filings > SEC Filings                  | Published | 12/11/2002 | <a href="#">Properties</a> |  |
| 1519         | <a href="#">August 22, 2002 8-K Announcement</a>   | News    | SEC Filings > SEC Filings                  | Published | 12/11/2002 | <a href="#">Properties</a> |  |
| 1513         | <a href="#">Aviation Aircraft Selects GBI's Advanced Design For New XBY Aircraft Engines</a> | News    | Investor News > News Stories Headlines     | Published | 11/01/2002 | <a href="#">Properties</a> |  |
| 1045         | <a href="#">Enterprise Portal Prerelease Notes</a>   | Managed | Company News > Headline News               | Published | 01/01/2002 | <a href="#">Properties</a> |  |
| 1514         | <a href="#">GBI Announces Promotions</a>   | News    | Investor News > News Stories Headlines     | Published | 11/01/2002 | <a href="#">Properties</a> |  |
| 1515         | <a href="#">GBI Announces The Acquisition of American Plastics</a>                           | News    | Investor News > News Stories Headlines     | Published | 11/01/2002 | <a href="#">Properties</a> |  |
| 1516         | <a href="#">GBI Regains Top Spot In The Medical Products Industry</a>                        | News    | Investor News > News Stories Headlines     | Published | 11/01/2002 | <a href="#">Properties</a> |  |

Submit News Articles page

Use this page to view all articles that you have authored, submitted, or updated. From this page you can edit, rework, resubmit, and add articles. You can edit all aspects of unpublished articles and modify summary information of published articles.

**Add Article**

Select to add a new article to this section.

|                      |  |
|----------------------|--|
| <b>Filter</b>        | <p>Click to limit the number of articles displayed on the page based on the values entered for the following options:</p> <ul style="list-style-type: none"><li>• <b>Status:</b> Select to search articles with a status of <i>Draft</i>, <i>Pending</i>, <i>Published</i>, <i>Rejected</i>, <i>Rework</i>, or <i>All</i>.</li><li>• <b>Type:</b> Select to search articles with a type of <i>File</i>, <i>Text/HTML</i>, <i>Web Site</i>, or <i>All</i>.</li><li>• <b>Published in Last 30 Days:</b> Select to limit your search to articles published within the last 30 days.</li></ul> <p>You can narrow the list by indicating a particular type or status of content and those articles published in the last 30 days.</p> |
| <b>Origin</b>        | <p>Shows where the article originated:</p> <ul style="list-style-type: none"><li>• <i>News</i> indicates that the article was created from the News Publications feature.</li><li>• <i>Managed</i> indicates that the articles were imported from Managed Content.</li></ul>   |
| <b>Location Path</b> | <p>Displays the path to the article location.</p> <hr/> <p><b>Note.</b> Articles that are in multiple locations appear multiple times in the list.</p> <hr/>   |
| <b>Publish</b>       | <p>Shows the date that articles are published based on the folder properties for this section.</p>   |
| <b>Status</b>        | <p>Displays this article's current publishing status: <i>Draft</i>, <i>Pending</i>, <i>Publish</i>, <i>Reject</i>, or <i>Rework</i>.</p>   |
| <b>Properties</b>    | <p>Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location.</p> <p>See <a href="#">Chapter 2, "Setting Up the Content Management System," Setting Feature Definitions, page 33.</a></p>  |

## Chapter 8

# Using the Advanced Options

This chapter discusses how to:

- Browse all folders.
- Search all folders.
- Maintain all folders.
- Maintain all content.
- Unlock content.
- Review content details.
- Render content URLs.
- Search for content.

---

## Browsing All Folders

This section discusses how to browse all folders.

## Browsing All Folders

Access the Browse feature (select Content Management, Advanced Options, Browse All Folders).

## Browse Managed Content Feed ▾

Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder details.

Add Top Folder
Search Content

| Top  |  |           |          |             |                            |                        | Customize   Find   View All | First  1-11 of 11  Last |
|------|--|-----------|----------|-------------|----------------------------|------------------------|-----------------------------|-------------------------|
| ID   | Title  | Site Name | Modified | Modified By |                            |                        |                             |                         |
| 1002 | <a href="#">Corporate Communications (4)</a> ☆ | EMPLOYEE  | 02/13/09 | VP1         | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 1272 | <a href="#">Facilities Site Content (8)</a>    | EMPLOYEE  | 01/18/03 | SAMPLE      | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 980  | <a href="#">Internal Controls Enforcer (1)</a> | EMPLOYEE  | 03/10/04 | VP1         | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 1501 | <a href="#">Investor Portal Solution (3)</a>   | EMPLOYEE  | 02/10/09 | VP1         | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 2088 | <a href="#">MIGR 1 (2)</a> ☆                   | EMPLOYEE  | 02/13/09 | VP1         | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 1273 | <a href="#">Public Statements (2)</a>          | EMPLOYEE  | 01/18/03 | SAMPLE      | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |
| 10   | <a href="#">Shared Content (0)</a>             | CUSTOMER  |          | PPLSOFT     | <a href="#">Properties</a> |                        |                             |                         |
| 10   | <a href="#">Shared Content (0)</a>             | PARTNER   |          | PPLSOFT     | <a href="#">Properties</a> |                        |                             |                         |
| 10   | <a href="#">Shared Content (3)</a>             | EMPLOYEE  |          | PPLSOFT     | <a href="#">Properties</a> |                        |                             |                         |
| 10   | <a href="#">Shared Content (0)</a>             | SUPPLIER  |          | PPLSOFT     | <a href="#">Properties</a> |                        |                             |                         |
| 2083 | <a href="#">test (0)</a> ☆                     | EMPLOYEE  | 02/11/09 | VP1         | <a href="#">Properties</a> | <a href="#">Delete</a> |                             |                         |

Example of a page in the Browse feature

The Browse All Folders option enables you to drill down through the top level folders to locate and view content that is in one of these features (EPPCM\_HIERTOP\_MAIN and EPPCM\_HIER\_MAIN):

- Browse Workspace Content
- Browse Discussion Content
- Browse Navigation Content
- Browse Menu Items
- Browse Pagelet Wizard Content
- Browse Related Content

---

**Note.** The Browse All Folders option is the only browse option by which you can locate and access content across all portal sites without having to log into that site.

---

## Searching All Folders

This section discusses how to search all folders.

### Searching All Folders

Access the Search Folders page (EPPCM\_HIERARCHY) (select Content Management, Advanced Options, Search All Folders).

### Search Folders

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300):

Folder ID:

Folder Title:

Parent ID:

Last Item Added:

[Basic Search](#)
[Save Search Criteria](#)

### Search Results

[View All](#) First  1-100 of 137  [Last](#)

| Folder Title                               | Feature | Folder ID | Parent Title                               | Parent ID | Site Name | Last Item Added |
|--|---------|-----------|--|-----------|-----------|-----------------|
| <a href="#">Shared Content</a>             | Managed | 10        | <a href="#">Shared Content</a>             | 10        | EMPLOYEE  | (blank)         |
| <a href="#">Internal Controls Enforcer</a> | Managed | 980       | <a href="#">Internal Controls Enforcer</a> | 980       | EMPLOYEE  | (blank)         |
| <a href="#">Corporate Communications</a>   | Managed | 1002      | <a href="#">Corporate Communications</a>   | 1002      | EMPLOYEE  | 07/17/2009      |
| <a href="#">Products</a>                   | Managed | 1008      | <a href="#">Corporate Communications</a>   | 1002      | EMPLOYEE  | 12/12/2004      |
| <a href="#">Partners</a>                   | Managed | 1012      | <a href="#">Corporate Communications</a>   | 1002      | EMPLOYEE  | 12/12/2004      |
| <a href="#">Portal</a>                     | Managed | 1016      | <a href="#">Products</a>                   | 1008      | EMPLOYEE  | 12/12/2004      |
| <a href="#">Technology</a>                 | Managed | 1022      | <a href="#">Portal</a>                     | 1016      | EMPLOYEE  | 12/12/2004      |
| <a href="#">HRMS</a>                       | Managed | 1024      | <a href="#">Products</a>                   | 1008      | EMPLOYEE  | (blank)         |
| <a href="#">Facilities Site Content</a>    | Managed | 1272      | <a href="#">Facilities Site Content</a>    | 1272      | EMPLOYEE  | 01/16/2003      |

Search Folders page

The Search All Folders option enables you to locate a folder in the Content Management system in any site, and access the children associated with the selected folder.

You can search by *Feature*, *Folder ID*, *Folder Title*, *Last Item Added*, *Parent ID*, or *Site Name*.

---

## Maintaining All Folders

This section discusses how to use the Maintain All Folders option.

### Using the Maintain All Folders Option

Access the Maintain Folders page (EPPCM\_DEFN\_CATG) (select Content Management, Advanced Options, Maintain All Folders).

### Maintain Folders

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300):

Feature: =

Folder ID: =

Site Name: begins with

Folder Title: begins with

Parent ID: =

Last Item Added: =

### Search Results

[View All](#) First  1-100 of 223  Last

| Folder Title                                 | Feature    | Folder ID | Parent Title                          | Parent ID | Site Name | Last Item Added |
|--|------------|-----------|---------------------------------------|-----------|-----------|-----------------|
| <a href="#">PeopleSoft Documents</a>         | Categorize | 1202      | <a href="#">PeopleSoft Documents</a>  | 1202      | EMPLOYEE  | 07/21/2009      |
| <a href="#">About PeopleSoft</a>             | Categorize | 1203      | <a href="#">PeopleSoft Documents</a>  | 1202      | EMPLOYEE  | 07/21/2009      |
| <a href="#">Portal Implementation</a>        | Categorize | 1204      | <a href="#">PeopleSoft Documents</a>  | 1202      | EMPLOYEE  | 07/21/2009      |
| <a href="#">Technology</a>                   | Categorize | 1205      | <a href="#">Portal Implementation</a> | 1204      | EMPLOYEE  | (blank)         |
| <a href="#">Current Version (Tools 8.4)</a>  | Categorize | 1206      | <a href="#">Portal Implementation</a> | 1204      | EMPLOYEE  | (blank)         |
| <a href="#">Former Versions (Tools 8.1x)</a> | Categorize | 1207      | <a href="#">Portal Implementation</a> | 1204      | EMPLOYEE  | (blank)         |

### Maintain Folders page

The Maintain All Folders option enables you to locate a folder that is stored in the Content Management system in any site and access the children associated with the selected folder.

Use the Maintain Folders search page to find the desired folder. You can search by *Feature*, *Folder ID*, *Folder Title*, *Last Item Added*, *Parent ID*, or *Site Name*. Click the folder title to access the Content Properties page, where you can edit or view the property details based on your security access.

---

## Maintaining All Content

This section discusses how to use the Maintain All Content option.

Access the Maintain Content page (EPPCM\_DEFN\_CONT) (select Content Management, Advanced Options, Maintain All Content).

### Maintain Content

Enter any information you have and click Search. Leave fields blank for a list of all values.

Maximum number of rows to return (up to 300):

Feature:    
 Content ID:    
 Content Type:    
 Content Title:    
 Parent ID:    
 Site Name:    
 Content Added:    
 Inactive Date:

[Basic Search](#)

#### Search Results

Only the first 300 results of a possible 394 can be displayed. Enter more search key information and search again to reduce the number of search results or adjust the maximum number of rows to return and search again to see more rows.

[View All](#)
First  Last

| Content Title   | Feature    | Content ID | Content Type | Parent Title                                | Parent ID | Site Name | Content Added | Inactive Date |
|---|------------|------------|--------------|---|-----------|-----------|---------------|---------------|
| <a href="#">Portal Solutions Overview</a>                 | Categorize | 1043       | Text/HTML    | <a href="#">Portal Implementation</a>       | 1204      | EMPLOYEE  | 07/21/2009    | (blank)       |
| <a href="#">Portal Solutions</a>                          | Categorize | 1044       | Web Site     | <a href="#">Portal Implementation</a>       | 1204      | EMPLOYEE  | (blank)       | (blank)       |
| <a href="#">Enterprise Portal Prerelease Notes</a>        | Categorize | 1045       | Attachment   | <a href="#">Current Version (Tools 8.4)</a> | 1206      | EMPLOYEE  | 12/12/2004    | (blank)       |
| <a href="#">Getting Started with Portal Solutions 8.4</a> | Categorize | 1046       | Attachment   | <a href="#">Current Version (Tools 8.4)</a> | 1206      | EMPLOYEE  | (blank)       | (blank)       |

## Maintain Content page

The Maintain Content option enables you to locate and maintain the properties for the content stored in the Content Management system in any site.

Use the Maintain Content search page to find the desired content item. You can search by *Archive Date*, *Content Added*, *Content ID*, *Content Title*, *Content Type*, *Feature*, *Parent ID*, or *Site Name*.

Click the content title to access the Content Properties page, where you can edit or view the property details based on your security access.

## Unlocking Content

This section provides an overview of the unlocking process and discusses how to unlock managed content.

### Understanding the Unlocking Process

Users with authorization to release locks on content under their folders can do so from the Unlock Managed Content page. This action is different from canceling your own checkout while editing content. Unlocking enables you to release content locked by another user and return the content for editing. It does not perform a check-in action or discard the most recent content version.

**Note.** Canceling the checkout from the Content Properties page may delete the most recent version and release the editing lock at the same time. A version can be deleted only if it is in draft status and more than one version exists.

## Unlocking Managed Content

Access the Unlock Managed Content page (EPPCM\_LOCK\_MAIN) (select Content Management, Advanced Options, Unlock Content; select the *Managed Content* feature on the Unlock Content search page).

| ID   | Title   | Checked Out      | Checked Out By |
|------|---|------------------|----------------|
| 1033 | <a href="#">PwC Consulting Supports PeopleSoft as an Enterprise Applications Provider</a> | 01/30/02 12:35PM | VP1            |
| 1688 | <a href="#">Process Narrative</a>   | 05/13/04 5:02PM  | VP1            |
| 1647 | <a href="#">Process Narrative</a>   | 05/13/04 4:35PM  | VP1            |
| 1689 | <a href="#">Process Metrics</a>   | 05/13/04 5:36PM  | VP1            |
| 1607 | <a href="#">Process Map</a>   | 04/30/04 1:30PM  | VP1            |
| 1603 | <a href="#">Process Map</a>   | 04/30/04 1:25PM  | VP1            |
| 1604 | <a href="#">Process Map</a>   | 04/30/04 1:27PM  | VP1            |
| 1605 | <a href="#">Process Map</a>   | 04/30/04 1:27PM  | VP1            |

Unlock Managed Content page

Alternatively, access the Unlock Documents page (select Content Management, Advanced Options, Unlock Content; select the *Collaborative Workspace* feature on the Unlock Content search page).

Use the Unlock Managed Content page and the Unlock Documents page to release the lock on the listed content items and view content property details.

**Unlock Content** Select individual items or select the Select All option to select all items, and then click the Unlock Content button to release the lock on selected items.

**Note.** When an item has been unlocked, it is automatically removed from the list.

**Locked Within Days** Enter a number and then click the Filter button to limit the number of items listed to content items that were locked up to that number of days ago.

**Title** Click to view the content in the same format as it is seen by viewers.

**Properties** Click to view the property details of the content.

## Reviewing Content Details

This section provides an overview of the Review Content option and discusses how to review content details.

## Understanding the Review Content Option

The Review Content page shows all content and all states and provides users with the following information based on their viewing rights:

- All locations where the content is published.

Users can navigate to only the folders that they have security privileges to access.

- All members of the qualified viewing community, along with their access types.
- Access to a preview of the content for qualified viewers.

The Preview Content link is hidden from users who do not have the correct security access.

- Access to the property details of the content if the user has viewer privilege.

The Content Properties link is hidden from users who do not have the correct security access.

---

**Note.** Access authorization to the Review Content page is delivered by the PAPP2070 permission list.

---

Unlike other pages accessible from the Content Management menu, the Review Content page does not use the row-level security enforced by folder membership and privileges. If a user's permission list has access to this page, he or she can review a content title, where the content item is located, and who has access. However, that user cannot view the actual content if he or she has not been assigned the correct security privileges.

## Reviewing Content Details

Access the Review Content page (EPPCM\_INQ\_MAIN) (select Content Management, Advanced Options, Review Content).

## Review Content

Review the locations, security, and display of content in the Content Management system. The Content Locations list where the content can be accessed. The Viewing Members list the users and roles that have viewing access to the content.

**Content Title:** Portal Solutions Overview  
**Content ID:** 1043  
**Content Type:** Text or HTML  
**Content Origin:** Managed Content

**Feature:** Categorized Content  
**Inactive Date:**

[Content Properties](#) [Preview Content](#) [Search Content](#)

| Content Locations   |           |  |
|---------------------|-----------|--|
| Feature             | Site Name | Location Path  |
| Managed Content     | EMPLOYEE  | <a href="#">Top</a> > <a href="#">Corporate Communications</a> > <a href="#">Products</a> > <a href="#">Portal</a> |
| Categorized Content | EMPLOYEE  | <a href="#">Top</a> > <a href="#">PeopleSoft Documents</a> > <a href="#">Portal Implementation</a>                 |

| Viewing Members     |             |                      |
|---------------------|-------------|----------------------|
| Member Name         | Member Type | Member Access Type   |
| PAPP_CONTCATGADM    | User        | Top Administrator    |
| PAPP_CONTCATG_ADMIN | Role        | Privilege Set Viewer |
| PAPP_CONTENTADM     | User        | Top Administrator    |
| PAPP_CONTENT_ADMIN  | Role        | Privilege Set Viewer |
| PAPP_CUSTOMER       | Role        | Folder Viewer        |
| PAPP_CUSTOMER       | Role        | Privilege Set Viewer |
| PAPP_EMPLOYEE       | Role        | Folder Viewer        |
| PAPP_EMPLOYEE       | Role        | Privilege Set Viewer |
| PAPP_PUBLISHER      | Role        | Privilege Set Viewer |
| PS                  | User        | Top Administrator    |
| VP1                 | User        | Top Administrator    |

Review Content page: Categorized Content

This page provides an easy way to review the different locations and security that are assigned to any content located in Content Management, view content properties, and preview the content in the same format as seen by viewers.

**Content Type** Displays the type of content.

Possible types are *File Attachment*, *Image Attachment*, *Image URL*, *Image Upload JPG*, *Managed Content*, *Menu Item*, *Text or HTML*, and *Web Site URL*.

**Content Origin** Displays the location where the content first originated.

Origins are *Managed Content*, *Categorized Content*, *News Publications*, and *Workspaces*.

### Content Locations

**Feature** Indicates the features to which the content is currently accessible: *Categorized Content*, *Collaborative Workspace*, *Discussion Forum*, *Manage Navigation*, *Managed Content*, *Menu Items*, *News Publications*, *Pagelet Wizard*, or *Related Information*.

This field also clarifies the location to which the Location Path value applies.

|                           |  |
|---------------------------|--|
| <b>Location Path</b>      | <p>Indicates the hierarchical paths and locations to which the selected content is accessible.</p> <p>If you have access to the folders, location paths appear as links; you can click those links to access the appropriate Browse Content page. If you do not have access permission, the location paths appear as basic text.</p> <p>See <a href="#">Chapter 3, "Accessing Content," Understanding the Folder Hierarchy, page 65.</a></p>   |
| <b>Preview Content</b>    | Click to view the content in the same format as it is seen by the viewers.   |
| <b>Content Properties</b> | Click to view the property details of the content.   |
| <b>Viewing Members</b>    |  |
| <b>Member Type</b>        | Indicates the type of member that has viewer access to the selected content. Values are <i>Role</i> and <i>User</i> .  |
| <b>Member Name</b>        | Depending on the Member Type value, displays the role name or user ID that has viewer access to the selected content.  |
| <b>Member Access Type</b> | <p>Displays the type of viewer access that the member has for the selected content:</p> <ul style="list-style-type: none"> <li>• <i>Top Administrator</i> indicates that the member is a top folder administrator.</li> <li>• <i>Privilege Set Viewer</i> indicates that the member has viewing privileges to the content's parent folder.</li> <li>• <i>Content Viewer</i> indicates the viewer role associated with the content item (for news publications).</li> <li>• <i>Folder Viewer</i> indicates the viewer role associated with the parent folder of the content.</li> </ul> |

---

## Rendering Content URLs

This section discusses how to:

- Generate URLs for third-party access.
- Preview content.

## Pages Used to Render Content URLs

| Page Name          | Definition Name   | Navigation   | Usage   |
|--------------------|---|--|---|
| Render Content URL | EPPCM_RNDR_MAIN   | Content Management, Advanced Options, Render Content URL   | Generate URLs for third-party access.                             |
| Preview Content    | EPPCM_PUB_VIEWURL<br>EPPCM_PUB_VIEWHTML<br>EPPCM_PUB_VIEWFILE | Content Management, Advanced Options, Render Content URL<br><br>Select the Preview Content tab on the Render Content URL page. | Review content in the format in which it will be seen by viewers. |

## Generating URLs for Third-Party Access

Access the Render Content URL page (select Content Management, Advanced Options, Render Content URL).

Render Content URL

Preview Content

This content is approved and can be published. Select the rendering options, then click 'Format Rendering URL'. Use the formatted 'Rendering URL' to directly access the content from a Third-Party system.

Content Title: Portal Solutions Overview  
 Content ID: 1043  
 Content Type: Text or HTML  
 Content Origin: Managed Content [Content Properties](#)

**Rendering Options**

Wrap in Portal

Include Content Title

Include Summary Information

Include Page Title

Include Return Link

Rendering URL:  
[http://rtas209.us.oracle.com:8000/psc/y910r21bnt/EMPLOYEE/EMPL/c/EPPCM\\_CONTENT\\_MGMT.EPPCM\\_PUB\\_VIEWER.GBL?EPPCM\\_CONTENTID=1043&SHOW\\_SUMMARY=Y](http://rtas209.us.oracle.com:8000/psc/y910r21bnt/EMPLOYEE/EMPL/c/EPPCM_CONTENT_MGMT.EPPCM_PUB_VIEWER.GBL?EPPCM_CONTENTID=1043&SHOW_SUMMARY=Y)

Render Content URL page

**Format Rendering URL** Click to generate a URL to rendered content in the Rendering URL field.

---

**Important!** If you change your rendering option selections, you must click this button to reconstruct a proper URL.

---

**Rendering URL** Contains the URL generated to access content rendered using the options selected on this page.

---

**Note.** This URL is not stored.

---

This URL provides direct viewer access to rendered content for qualified viewers from any location within or outside your PeopleSoft Enterprise Portal who also have appropriate viewer access to the rendered content.

Users who want to access this URL from outside the PeopleSoft Enterprise Portal must be able to log in to the portal, unless single login is implemented. If this URL is published and accessed from within the same PeopleSoft Enterprise Portal in which the content is located, no login is necessary because the user accessing the URL will already be logged in.

### **Rendering Options**

Use the options in the Rendering Options section to set rendering options for the selected content. You can view the results of your selection on the Preview Content Inquiry page, or by accessing the rendering URL generated on this page.

If you do not select any rendering options, only text or HTML content is rendered. If the content is a document attachment or website URL, only a link to the attachment or website is rendered.

---

**Note.** If both Wrap in Portal and Include Return Link options are selected on the Render Content URL page, you must ensure that the return URL value include */psc/* and not */psp/* if you intend to return to a PeopleSoft URL. If you leave the */psp/* in the URL, a double header will be rendered when the user clicks the Return link.

---

**Wrap in Portal** Select to display the content wrapped in the portal template header.

**Include Content Title** Select to include the content title in the rendered content.

**Include Summary Information** Select to include the content summary information in the rendered content. This selection includes a summary of the content, as well as the content source and last modified date and time, and any associated image.

**Include Page Title** Select to include a page title for the content. When you select this option, the Default Page Title and Override Page Title fields appear.

**Default Page Title and Override Page Title** A default page title of *View Content* appears; however, you can override this value by entering a title in the Override Page Title field.

**Include Return Link** Select to include an explicit return link on the content display page, enabling your viewer to navigate back to an appropriate location. When you select this option, the Default Return Label, Override Return Label, and Return to URL Value fields appear.

|                             |  |
|-----------------------------|--|
| <b>Default Return Label</b> | A default return label of <i>Return</i> appears; however, you can override this value by entering a return label in the Override Return Label field. |
| <b>Return to URL Value</b>  | Enter the URL to an explicit location to which you want to return your users from the content display page.  |

## Previewing Content

Access the Preview Content page (select Content Management, Advanced Options, Render Content URL; select the Preview Content tab).

The screenshot shows the 'Preview Content' interface. At the top, there are two tabs: 'Render Content URL' and 'Preview Content'. The main heading is 'Portal Solutions Overview'. Below the heading, the source is listed as 'Marketing' and the modification date is '02/07/2002 2:32PM'. There is a link for 'Edit Content'. The content text reads: 'Portal Solutions Overview. PeopleSoft is the fastest growing portal vendor in the market. In just one year, more than 350 organizations have evaluated our Portal Solutions against our competitors products and have chosen PeopleSoft. Our Portal Solutions are a unification framework for every type of system and content your users need. You gain a customized, role-based homepage that is the single gateway to all your critical information such as PeopleSoft eBusiness applications, databases and applications from other vendors, external content, and more. Unlike portals from earlier-generation vendors, PeopleSoft Portal Solutions provides a complete infrastructure solution, with the tools, open integration framework, and platform to speed your migration to eBusiness with a single technology and quickly lower your cost of doing business.' Below the text is a 'Tags' section with a dropdown menu, a 'List: Public | Private' display, and an 'Edit' button. At the bottom are 'Update Tags' and 'Cancel' buttons.

Preview Content page

Use this page to review content in the format in which it will be seen by viewers.

|                     |   |
|---------------------|---|
| <b>Edit Content</b> | Click to access the Content Properties page, where you can edit content properties such as title, summary, and content location.<br><br>See <a href="#">Chapter 2, "Setting Up the Content Management System," Content Properties, page 35.</a> |
|---------------------|---|

## Searching for Content

This section discusses how to search for content management items.

### Searching for Content Management Items

Access the Search Content page (EPPCM\_SRCH\_MAIN) (select Content Management, Advanced Options, Search Content).

### Search Content

Enter search keywords, using quotes for any phrases. Click Search Tips for more details. Select 'Current Folder' to retrieve content within the current folder's hierarchy. Select 'Current Site' to retrieve content within the current site.

Search Text:  [Search Tips](#)

---

Search In:  Current Folder  Current Site  All Folders and Sites

---

Feature:  Categorized Content  
 News Publications  
 Managed Content

[Hide Summaries](#)

**Search Results** Find | View All | First | 1-10 of 10 | Last

|   |  |  |              |
|---|--|--|--------------|
| 1 | <a href="#">Operations</a>                 | Operations Information<br>Content ID: 1402 Source: Rich Ammerton<br>Tags: No Tags Available  | Rating: 0.82 |
| 2 | <a href="#">Grand Opening in Milano</a>    | The grand opening will be held in a "magic," themed location (Umanitaria), where guests will be invited to experience the Middle Ages with a fairy-tale flavor.<br>Content ID: 1001 Source: Marketing<br>Tags: event, press release, PS                | Rating: 0.80 |
| 3 | <a href="#">Save the Date to Celebrate</a> | Bring your family and come celebrate on Thursday, September 7 at Headquarters. We've got lots in store for you including food, drink, and special musical guests.<br>Content ID: 1021 Source: Corporate Communication<br>Tags: event, party, celebrate | Rating: 0.80 |

Search Content page

The Search Content page uses the Verity feature to search for content within Content Management.

- Search Tips** Click to access the Search Tips page, where you can view an outline of search techniques you can use to expand and constrain searches.
- Search Text** Enter the text, tag words, or key words to search on.

**Search In**

Define the scope of the search to cover the current folder, the current site, or all folders and sites.

---

**Note.** The Current Folder option applies when you click the Search Content button from a folder hierarchy or property page.

---

**Feature**

Select which feature items to search.

For example, to search only news publications, select only the News Publications option.

**Search Results**

The result links point to the content properties page within the folder location that was found first and to which you have access.

## Chapter 9

# Setting Up and Managing Company Promotions

This chapter provides an overview of company promotions and discusses how to:

- Set up company promotions.
- Manage company promotions.
- View company promotions by role.

---

## Understanding Company Promotions

Company promotions enable you to highlight special products, promotions, or transactions for your portal users by displaying them prominently on their home page. The Company Promotions feature can add this type of content to any portal product so that users can link to specific transactions or URLs in your system. Users can personalize their views of company promotions by selecting categories, displaying number of rows, and selecting a narrow or wide version of the pagelet.

---

## Setting Up Company Promotions

This section discusses how to:

- Define company promotion targets.
- Define company promotion categories.
- Define company promotion content.

## Pages Used to Set Up Company Promotions

| <i>Page Name</i>                 | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|----------------------------------|------------------------|--|--|
| Define Company Promotion Targets | EO_PE_PR_TARGET        | Portal Administration, Pagelets, Promotions, Promotion Targets | Make portal registry content references available as promotion target pages. |

| Page Name                    | Definition Name  | Navigation  | Usage  |
|------------------------------|------------------|---|--|
| Company Promotion Categories | EO_PE_PR_CAT_TBL | Portal Administration, Pagelets, Promotions, Promotion Categories   | Define company promotions categories.  |
| Company Promotions           | EO_PE_PR_SETUP   | <ul style="list-style-type: none"> <li>Portal Administration, Pagelets, Promotions, Edit Promotions</li> <li>My Content, Submit Promotions</li> </ul> | Define pagelet content for your promotions.<br><br><b>Note.</b> End users who submit promotions should access the page through Portal Administration. Managers who edit or add promotions should access the page through My Content. |

## Defining Company Promotion Targets

Access the Define Company Promotion Targets page (select Portal Administration, Pagelets, Promotions, Promotion Targets).

### Define Company Promotion Targets

Promotion Target ID: 000000000000001

\*Description:

\*Menu Item:  [Ext News View Article](#)

Menu Folder: Pagelet Enhance - Hidden

| Menu Item Parameters |              | Customize   Find       First 1-3 of 3 Last |            |                                     |                                     |     |
|----------------------|--------------|--|------------|-------------------------------------|-------------------------------------|-----|
|                      | *QueryString | *Description                               | Key Value  | Required                            | User Specified                      |     |
| 1                    | ACTION       | Page Mode                                  | U          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | + - |
| 2                    | ARTICLE_ID   | Article ID                                 |            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + - |
| 3                    | WP_COMP_ID   | Component ID:                              | 0000000005 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | + - |

Define Company Promotion Targets page

System administrators can use this page to make portal registry content references available as promotion target pages. Promotion targets can be either a URL definition or a portal registry content reference.

---

**Note.** A URL promotion target is any URL definition in the URL catalog of the Enterprise Portal database.

---

**Promotion Target ID**     Use the system-generated promotion ID or assign a new ID.

|                       |   |
|-----------------------|---|
| <b>Menu Item</b>      | Select from the content references in the portal registry.<br>The prompt table displays every target content reference that is available in the portal registry. The content reference that you select can be an iScript, a component, or an external URL.<br><hr/> <b>Note.</b> You might need to add your target page to the portal registry if it is not there. The Promotion Target page does not need to reside in the Portal database, but it must be registered there. <hr/> |
| <b>QueryString</b>    | Enter the expected Key Field names if the selected menu item requires you to use search keys to access it.  |
| <b>Key Value</b>      | Enter the value for key values that are part of the target definition.  |
| <b>Required</b>       | Select if the QueryString is required to access the target page.<br><hr/> <b>Note.</b> If the User Specified and Required options are selected, you must enter the query key value of string for the promotion when the company promotion is created. <hr/>   |
| <b>User Specified</b> | Clear the Key Value field and select the User Specified option if the key value is user-specified.  |

### Example

The following example shows three required query string values. Two of the key values are user-specified, and the third is part of the target definition. The target page requires the search fields BUSINESS\_UNIT, PRODUCT\_ID, and VENDOR. Any company promotion that uses this target page has the business unit M04 appended as part of the URL query string. The product ID and vendor are defined by each promotion that uses this target page. This results in a link that contains the content reference URL with an appended query string for the search fields BUSINESS\_UNIT, PRODUCT\_ID, and VENDOR.

| <i>Query String</i> | <i>Key Value</i> | <i>Required</i> | <i>User-Specified</i> |
|---------------------|------------------|-----------------|-----------------------|
| BUSINESS_UNIT       | M04              | Yes             | No                    |
| PRODUCT_ID          | not applicable   | Yes             | Yes                   |
| VENDOR              | not applicable   | Yes             | Yes                   |

## Defining Company Promotion Categories

Access the Company Promotion Categories page (select Portal Administration, Pagelets, Promotions, Promotion Categories).

### Company Promotion Categories

Category ID: 0000000000000001

\*Promotion Category:  

\*Description:  

Show Section for All Users

Company Promotion Categories page

|                                   |  |
|-----------------------------------|--|
| <b>Promotion Category</b>         | Enter the promotion category name.   |
| <b>Show Section for All Users</b> | Select to make this category a required section on all Company Promotion pagelets. |

---

**Note.** If all Company Promotion categories are set to Show Section for All Users, users cannot personalize the Company Promotion pagelet.

---

## Defining Company Promotion Content

Access the Company Promotions page (select Portal Administration, Pagelets, Promotions, Edit Promotions).

### Company Promotions

**Promotion ID:** 000000000000005 **Publish Status:** Pending

**\*Internal Title:**  

**\*Promotion Title:**  

**\*Hyperlink Label:**  

**\*Summary:**  

**\*Content:**  

**\*Publish Date:**  

**Expiration Date:**  

**Promotion Image**

 Upload a jpg image. It will be sized to 50\*50 pixels in pagelets, 100\*100 pixels in detail.

Company Promotions page (1 of 2)

**Promotion Target**

**Target Page**

**Articles**

**Article ID:**

**Category ID:**

**Issue ID:**

**Section ID:**

---

**Promotion Audience** Customize | Find | View All |  1-6 of 6

| Select                              | Role Name     | Description            |
|-------------------------------------|---------------|------------------------|
| <input checked="" type="checkbox"/> | PAPI_GUEST    | Investor Portal Guest  |
| <input checked="" type="checkbox"/> | PAPP_CUSTOMER | Portal Customer        |
| <input type="checkbox"/>            | PAPP_EMPLOYEE | Portal Employee        |
| <input type="checkbox"/>            | PAPP_GUEST    | Guest User Access      |
| <input type="checkbox"/>            | PAPP_SUPPLIER | Portal Supplier        |
| <input type="checkbox"/>            | PAPP_USER     | Enterprise Portal User |

---

**Promotion Categories** Customize | Find | View All |  1-2 of 2

| Select                              | Promotion Category     | Description               |
|-------------------------------------|------------------------|---------------------------|
| <input checked="" type="checkbox"/> | PeopleSoft in the News | Articles about PeopleSoft |
| <input type="checkbox"/>            | Online Publications    | The latest publications   |

**Go To:** [Company Promotion](#)   [Narrow Preview](#)   [Wide Preview](#)   [Detail Preview](#)

Company Promotions page (2 of 2)

---

**Note.** A promotion with the publish status *Published* is only accessible in a display-only mode.

---

- Promotion ID, Internal Title, Promotion Title, Summary, and Content**      Complete these fields for each promotion. These entries appear on the user's Company Promotion pagelet or on the detailed view.
- Hyperlink Label**      Enter a label for the link that enables users to access the promotion item on the target page.
- Publish Date**      Displays the first date that the promotion appears on the pagelet.
- Expiration Date**      Displays the date that the promotion is removed from the pagelet.

**Promotion Image****Upload Image**

Click to add a graphic next to the Company Promotion item on the pagelet.  
Select a JPG image file from the machine accessing the page via the browse feature.

**Promotion Target****Target Page**

Select either a Promotion Target content reference or a URL as the target page.  
This is the page that appears when the user clicks the link that is defined in the Hyperlink Label field. If the promotion target page that you select requires user-specified key values, these must be entered in the edit box or boxes that display the key value description as the label.

---

**Note.** The key values of the target page appear dynamically based on how the promotion target is defined.

---

See [Chapter 9, "Setting Up and Managing Company Promotions," Defining Company Promotion Targets, page 276.](#)

**Promotion Audience****Role Name**

Select the check box next to the role name for each audience that you want to reach with this promotion.  
Users see specific promotions selected for them based on their security roles.

**Promotion Categories****Promotion Category**

Select the check box for the item that you are promoting.  
The item appears in that promotion category.

---

**Note.** When a promotion has more than one category selected, the promotion appears once in a single category for a given user.

---

**Preview Pagelet Display**

Click one of these links to preview the Company Promotions pagelet.

**Narrow Preview**

Click to display promotion image, promotion title, link label, and summary of the promotion.

- Wide Preview** Click to display a longer and wider view of the pagelet with the promotion image, promotion title, link label, and summary of the promotion.
- Detail Preview** Click to display promotion image, promotion title, link label, content description, and expiration date of the promotion.
- Detail Preview also appears when you click the More link on the Company Promotion pagelet on the Homepage.

---

## Managing Company Promotions

This section discusses how to:

- Manage company promotions.
- Work with the submitted promotions pagelet.
- Work with the Company Promotions pagelet.

### Pages Used to Manage Company Promotions

| <i>Page Name</i>               | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--------------------------------|------------------------|--|--|
| Manage Company Promotions      | EO_PE_PR_MANAGE        | Portal Administration, Pagelets, Promotions, Manage Promotions                 | Track and update your promotions.  |
| Personalize Company Promotions | EO_PE_PR_PERS          | From the Homepage, click the Customize icon on the Company Promotions pagelet. | Specify company promotions to display on the Company Promotions pagelet. |

### Managing Company Promotions

Access the Manage Company Promotions page (select Portal Administration, Pagelets, Promotions, Manage Promotions).

| Manage Company Promotions   |                                  |              |         |              |
|---|----------------------------------|--------------|---------|--------------|
| Filter By:  |                                  | All          | Fetch   |              |
| Company Promotions  |                                  |              |         |              |
| Customize   Find   First 1-5 of 5 Last  |                                  |              |         |              |
|   | Description                      | Publish Date | *Status | Author OprID |
|  | Pure Internet                    | 10/02/2000   | Publish | VP1          |
|  | Peoplesoft 8 on Schedule         | 10/02/2000   | Publish | VP1          |
|  | June - August Web Mag            | 06/01/2000   | Publish | VP1          |
|  | Web Mag article about Co Springs | 08/01/2000   | Publish | VP1          |
|  | New Siebel Connector             | 07/21/2009   | Pending | VP1          |

### Manage Company Promotions page

After your promotions are created, you can view, publish, or rework them. You can also make changes by displaying the Company Promotion setup page.

**Filter By** Select the *Pending*, *Published*, *Remove*, or *Rework* option to limit the number of promotions to display.

**Fetch** Click to display the promotions that meet your selection criteria.



Click the Promotion ID icon to access the Company Promotion setup page for this item.

**Status** Select the *Pending*, *Publish*, *Remove*, or *Rework* option to change the status of the promotion.

Changing the status to *Publish* makes the publication available to display on the Company Promotions pagelet if the role of the user has been selected for that item.

## Working with the Submitted Promotions Pagelet

Access the Submitted Promotions pagelet (click the Content link on the menu bar on the Homepage, and then select the Submitted Promotions option in the Personalize Content page).

| Submitted Promotions                             |         |                  |              |
|--|---------|------------------|--------------|
| Company Promotions                               | Status  | Promotion ID     | Publish Date |
| <a href="#">New Siebel Connector</a>             | Pending | 0000000000000005 | 07/21/2009   |
| <a href="#">Pure Internet</a>                    | Publish | 0000000000000001 | 10/02/2000   |
| <a href="#">Peoplesoft 8 on Schedule</a>         | Publish | 0000000000000002 | 10/02/2000   |
| <a href="#">Web Mag article about Co Springs</a> | Publish | 0000000000000004 | 08/01/2000   |
| <a href="#">June - August Web Mag</a>            | Publish | 0000000000000003 | 06/01/2000   |
| <a href="#">View more promotions</a>             |         |                  |              |

### Submitted Promotions pagelet

Use this pagelet to track submitted promotions and their publishing status directly from your Homepage.

From this pagelet, you can access the Submit Content page for the company promotions item by clicking the link for the promotion that you want to view. If you have not authored a company promotion, a message states that no items are available. If you have authored more than five promotions, you can search for specific authored items using the View More Promotions link. The items are displayed by the order of the publication dates.

---

**Note.** This pagelet displays only items that have been authored by the current user.

---

## Working with the Company Promotions Pagelet

This section discusses how to:

- Personalize the Company Promotions pagelet.
- Use the Company Promotions pagelet.

### ***Personalizing the Company Promotions Pagelet***

Access the Personalize Company Promotions page (at the Homepage, click the Customize icon on the Company Promotions pagelet).

## Personalize Company Promotions

Select the categories of promotions you'd like to see on your home page.

Number of promotions to display:

| Company Promotion Categories |                     |                                |
|------------------------------|---------------------|--------------------------------|
| Select                       | Promotion Category  | Order of Appearance            |
| <input type="checkbox"/>     | Online Publications | <input type="text" value="0"/> |

[Return Home](#)

Personalize Company Promotions page

**Number of promotions to display** Select the number of promotions to display on your Company Promotions pagelet.

**Promotion Category** Select for each promotion category that you want to display on your Company Promotions pagelet.

---

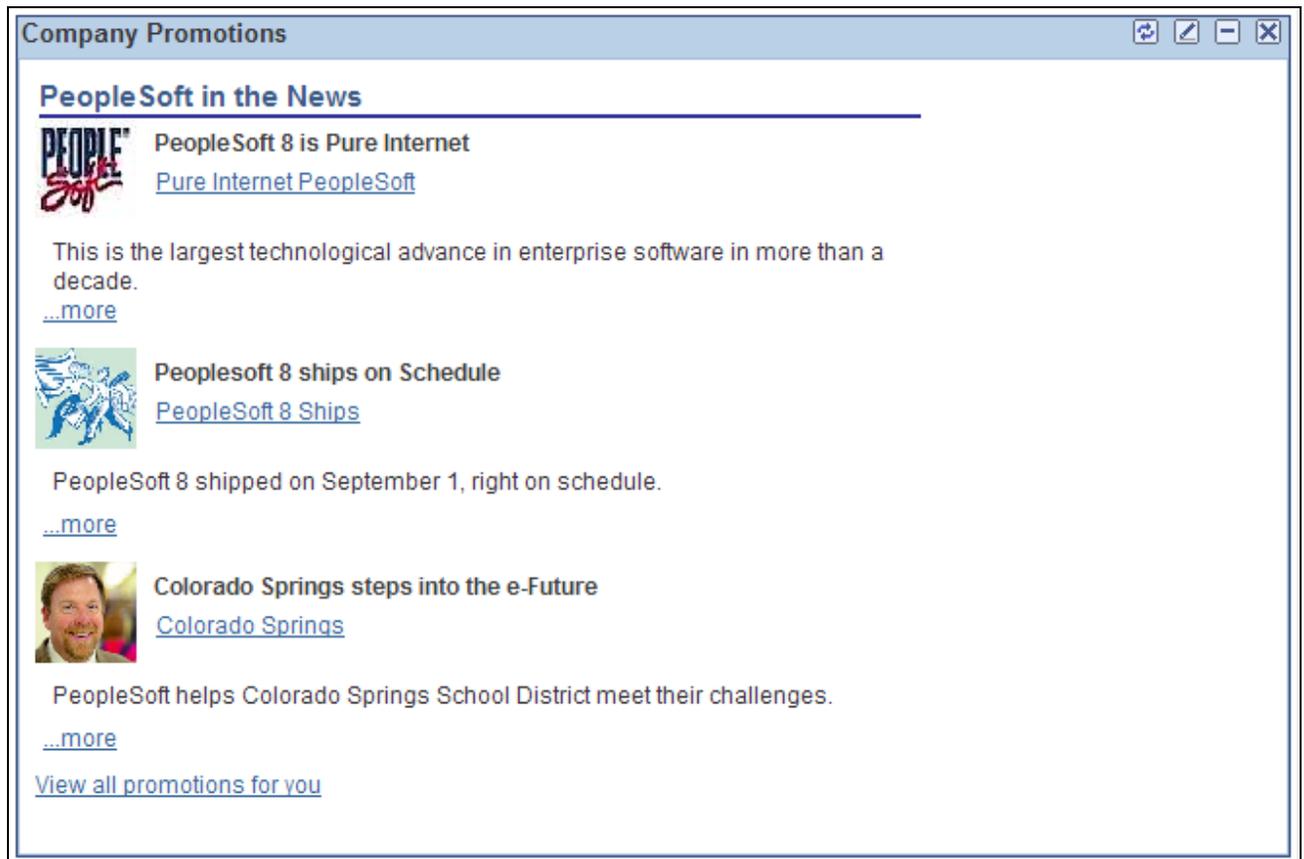
**Note.** If all promotion categories are required, the system displays a message on the page indicating that personalization is not available.

---

**Order of Appearance** Enter the order in which you want the promotion categories to display on your Company Promotions pagelet.

### ***Using the Company Promotions Pagelet***

Access the Company Promotions pagelet (click the Content link on the menu bar on the Homepage, and then select the Company Promotions option in the Personalize Content page).



Company Promotions pagelet

Use the Company Promotions pagelet to view published promotions. Click the promotion links to access the content being promoted.

---

## Viewing Company Promotions by Role

This section discusses how to:

- View promotions by role.
- Work with the Promotions by Role pagelet.

### Viewing Promotions by Role

Access the Content Inquiry by Role page (EO\_PE\_PR\_ROLE\_INQ) (select Portal Administration, Pagelets, Promotions, View Promotions by Roles).

### Content Inquiry by Role

Role Name:  ▼

Visible on date:  

#### Company Promotions

Click on the detail button to see the content detail.

| List of Promotions  |                                  |                |              |
|---|----------------------------------|----------------|--------------|
|   | Description                      | Publish Status | Publish Date |
|  | June - August Web Mag            | Publish        | 06/01/2000   |
|  | Web Mag article about Co Springs | Publish        | 08/01/2000   |
|  | Peoplesoft 8 on Schedule         | Publish        | 10/02/2000   |
|  | Pure Internet                    | Publish        | 10/02/2000   |

#### Content Inquiry by Role page

Use this page to list the promotions that are available to appear on the Company Promotions pagelet for a specific user role.



Click the Promotion Information icon to go to the Company Promotions page and view detail information about this item.

---

**Note.** Information on the Company Promotion section is display-only.

---

## Working with the Promotions by Role Pagelet

Access the Promotions by Role pagelet (click the Content link from the menu bar on the Homepage, and then select the Promotions by Role option in the Personalize Content page).

**Promotions by Role**   

Role:  ▼

#### Promotions by Role pagelet

Use the Promotions by Role pagelet to carry out a search for promotions by role on the Content Inquiry by Role page.

**Role** Select the role for the promotions that you want to view.

**Search**

Click to access the Content Inquiry by Role page, where the results of your search appear.

## Chapter 10

# Setting Up and Managing Web Magazines

This chapter provides an overview of Web Magazine and discusses how to:

- Set up web magazines.
- Maintain graphic images.
- Create and publish articles.
- Work with the Web Magazine pagelet.

---

## Understanding Web Magazine

This section discusses:

- Web Magazine overview
- Web magazine hierarchy
- Web magazine viewing security
- Web magazine benefits

## Web Magazine Overview

Web Magazine is an online publishing feature that enables users to create and publish collections of content such as department newsletters, policy handbooks, or mini-web sites through a graphical format. Web Magazine provides a way to communicate information to people in the organization who have access to the PeopleSoft portal.

Moving communications from printed materials to web publications greatly reduces printing costs without sacrificing graphical quality. Moreover, you can easily update and distribute web-based information.

Web Magazine includes the Web Magazines pagelet, which lists current and historical issues under a publication heading. The cover page is the first page that you see after selecting an issue. This page is your main navigation point to the rest of the publication. Common features of the cover page include the title bar and the publication navigation bar. You click links on the cover page to access other parts of the publication.

This is an example of a web magazine cover page:

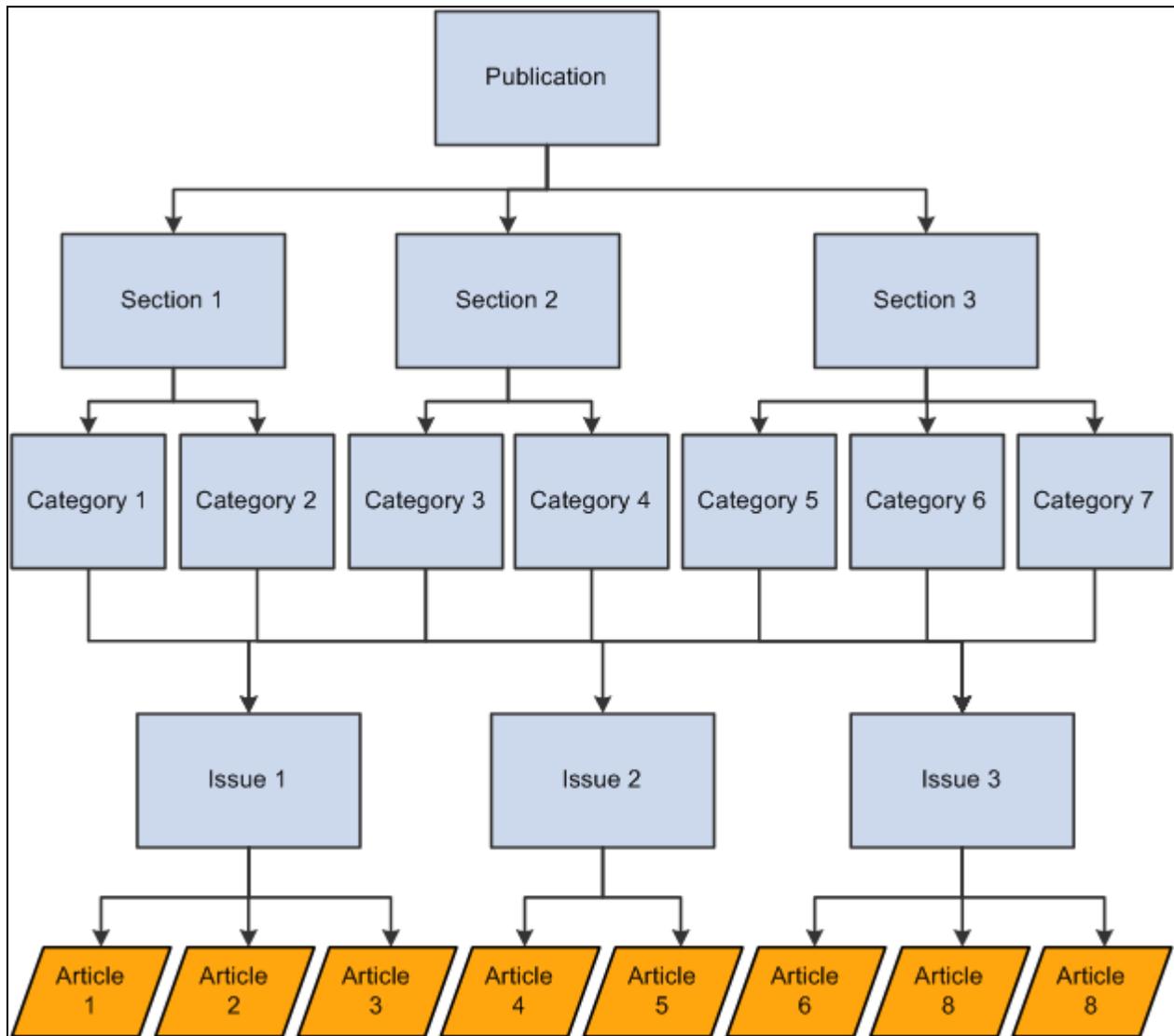


Example of a web magazine cover page

**Note.** Web magazines point to a single layout.

## Web Magazine Hierarchy

Web Magazine presents information in the form of a hierarchy as shown in this diagram:



Hierarchical presentation of information within a Web Magazine

Within this framework, you can organize information to suit your needs.

### **Example Hierarchy**

*PeopleTalk Online* is a publication, and *September - October 2004* is an issue that includes a particular collection of articles. *Industry* is a section, and *Manufacturing* is a category within that section. Within the *Manufacturing* category, the *JPM Company Aces Quick Response to Customers* article appears.

## **Web Magazine Viewing Security**

To set up pagelet and magazine viewing security:

1. Select Portal Administration, Navigation, Structure and Content.
2. In the Folders section, click the Portal Administration link and then click the Pagelets link.

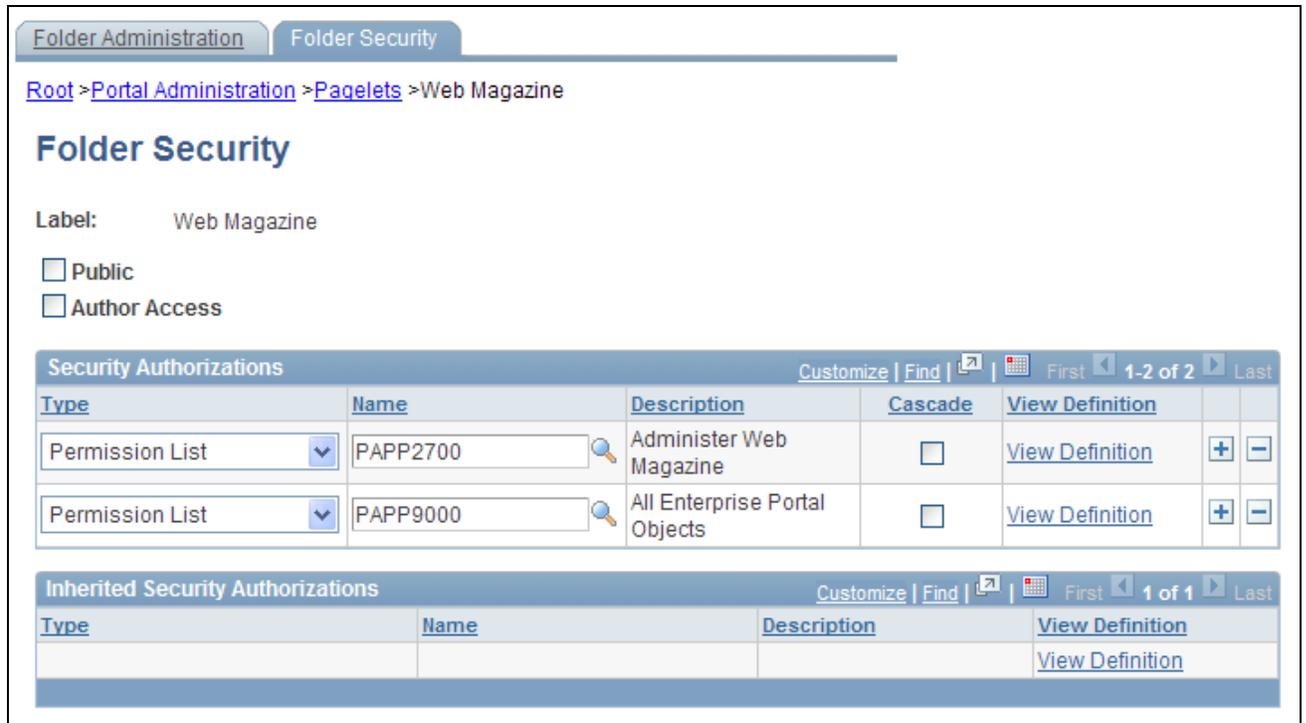
3. Click the Edit link for Web Magazine folder.
4. Select the Folder Security tab.

The Folder Security page appears.

5. Select the *Public* option if no restriction exists for accessing the Web Magazines pagelet.

Alternatively, to grant access selectively to the Web Magazines pagelet, select the *Permission List* option and select the appropriate permission lists.

This is an example of the Folder Security page:



Folder Security page

## Web Magazine Benefits

This table describes some of the benefits of using the Web Magazine feature:

| <b><i>Benefit</i></b>   | <b><i>Description</i></b>  |
|---|--|
| Content is stored and managed separately from the page presentation layout.                           | Web objects, such as text and images, can be reused, updated, or retired to provide a real-time, dynamic web publication using HTML templates. |
| Content components are stored in a centralized repository in a PeopleSoft Enterprise Portal database. | This repository is separate from the Content Management repository.  |

| <b>Benefit</b>   | <b>Description</b>   |
|--|--|
| Presentation templates can be customized for any type of web page. | Templates for the front cover page, sections, and article pages are delivered with PeopleSoft Enterprise Portal to give you a quick start. |

## Setting Up Web Magazines

The section discusses how to:

- Create publications.
- Create new issues.
- Define sections of a publication.
- Define section categories.

## Pages Used to Set Up a Web Magazine

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|------------------|------------------------|---|---|
| Publication      | EO_PE_PUBWP            | Portal Administration, Pagelets, Web Magazine, Publications | Add or update information about a publication.                      |
| Issue            | EO_PE_ISSUEWP          | Portal Administration, Pagelets, Web Magazine, Issues       | Add or edit information about an issue of a publication.            |
| Section          | EO_PE_SECTIONWP        | Portal Administration, Pagelets, Web Magazine, Sections     | Add or edit information about a section of an issue.                |
| Category         | EO_PE_CATEGORYWP       | Portal Administration, Pagelets, Web Magazine, Categories   | Create and store all the information about a category of a section. |

## Creating Publications

Access the Publication page (select Portal Administration, Pagelets, Web Magazine, Publications).

## Publication

General Information

**ID:** PEOPLETALK

**\*Long Name:**

**\*Short Name:**

Publication page

Use this page to create a new publication or edit the names of existing publications.

**Long Name** Enter the name that will appear on setup pages.

**Short Name** Enter the name that will appear on the Web Magazines pagelet.

## Creating New Issues

Access the Issue page (select Portal Administration, Pagelets, Web Magazine, Issues).

## Issue

**Publication:** PeopleTalk Online Magazine

General Information

**Issue ID:** JUNAUG2000

**\*Eff Date:**  

**\*Issue:**

**\*Short Desc.:**

**Volume:**

**Number:**

Issue page

Use this page to create new issues for publications. Enter an effective date that determines when the issue will become available on the Web Magazine pagelet. Volume and sequence numbers are informational only and not used by the system.

## Specifying Back Issues

Use PeopleSoft Application Designer to specify the number of back issues that will appear on the Web Magazines pagelet. The delivered value is a maximum of five issues for each publication.

To specify the number of back issues that will appear:

1. Modify the function `IScript_BuildWPPagelet()` in `WEBLIB_WEBPUB.EO_PE_PUB.FieldFormula`.
2. Scan for all occurrences of `&RowMax` and set it to the desired number.

## Defining Sections of a Publication

Access the Section page (select Portal Administration, Pagelets, Web Magazine, Sections).

### Section

**Publication:** PeopleTalk Online Magazine

General Information

**Section ID:** ECENTER **\*Sequence number:**

**\*Section:**

**Short Desc.:**

Section Image

**Image ID:**  **Category -** eCenter

Navigation Bar Images

**On Image ID:**  **Navbar On -** eCenter

**Off Image ID:**  **Navbar Off -** eCenter

Section page

Use this page to define the different sections of a publication.

**Sequence Number** The sequence number designates the placement of the section in the publication: 1 for the first section, 2 for the second section, and so on.

**Image ID** Select an ID that the Web Magazine template use to reference the section image.

**On Image ID** Select an ID for an image that appears in the section navigation bar when the user is in this section.

**Off Image ID**

Select an ID for an image that appears in the section navigation bar when the user is not in this section.

## Defining Section Categories

Access the Category page (select Portal Administration, Pagelets, Web Magazine, Categories).

### Category

**Publication:** PeopleTalk Online Magazine

**Section:** ECENTER

General Information

**ID:** NEWS

**\*Long Desc.:**

**Short Desc.:**

Images

**Category Image ID:**   Category - eCenter

Category page

Use this page to define categories for each section of the publication. The selected category image appears in the Web Magazine template.

---

## Maintaining Graphic Images

This section discusses how to register images.

### Registering Images

Access the Image page (EO\_PE\_IMGWP) (select Portal Administration, Pagelets, Web Magazine, Images).

## Image

General Information

ID: PWSA05PJ49C

\*Image Name:

Float Over Text:

Alignment and Spacing

Alignment:   Vertical Spacing:  Height:

Border Width:  Horizontal Spacing:  Width:

Source Information

\*Source:

\*File Name:

Image View



Image page

Use this page to add, edit, and register the images that you want to use with Web Magazine articles.

---

**Note.** Before creating articles, you must set up issue definitions and place the images you want to use in the proper directory for Web Magazine to access.

---

**ID** Displays the unique value entered on the Search page.  
An ID is a key field and it cannot be altered after it is entered.

**Image Name** Enter the name of the image.  
You may want to prefix the name with an indication of the use of the image; for example, cover, section, category, title, or article.

|  |   |
|--|---|
| <b>Float Over Text</b>                 | Enter the text that appears when the user moves the cursor over the image.  |
| <b>Alignment</b>                       | Select the image alignment.<br><br>Available options are <i>Absbottom</i> , <i>Absmiddle</i> , <i>Baseline</i> , <i>Bottom</i> , <i>Left</i> , <i>Middle</i> , <i>Right</i> , <i>Textop</i> , or <i>Top</i> . |
| <b>Vertical Spacing</b>                | Enter the number of pixels on the top and bottom of the image for vertical spacing.   |
| <b>Horizontal Spacing</b>              | Enter the number of pixels on the left and right of the image for horizontal spacing.   |
| <b>Height, Border Width, and Width</b> | Enter the number of pixels for the image height, border width, and width.   |
| <b>Source</b>                          | Enter the relative path on the web server where the image file is located.<br><hr/> <b>Note.</b> You must manually add the image to the web server directory that is specified in this field. <hr/>           |
| <b>File Name</b>                       | Enter the file name of the image.   |
| <b>View Image</b>                      | Click to preview the image.   |

## Creating and Publishing Articles

This section discusses how to:

- Create articles.
- Add article text.

## Pages Used to Create and Publish Articles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>                                       | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Article          | EO_PE_ARTICLEWPI       | Portal Administration, Pagelets, Web Magazine, Articles | Add and maintain general information about an article, including the title and summary, image assignment, and placement in a publication. |

| Page Name    | Definition Name  | Navigation  | Usage                                       |
|--------------|------------------|---|---|
| Article Text | EO_PE_ARTICLEWP2 | Portal Administration, Pagelets, Web Magazine, Articles<br>Select the Article Text tab on the Article page. | Add, edit, or view the text of the article. |

## Creating Articles

Access the Article page (select Portal Administration, Pagelets, Web Magazine, Articles).

Article
Article Text

### Article

**Publication:** PeopleTalk Online Magazine  
**Issue:** June - August 2000

General Information

**ID:** FEDEX **\*Sequence number:**

**\*Title:**

**Sub Title:**

**Author:**

Section / Category

**\*Section ID:**  Industry

**\*Category ID:**  Distribution

Images

**Title Image ID:**  Title - Federal Express

**Article Image ID:**  Article - Federal Express

Article page

Use this page to capture information that will be used later by the magazine template code when it renders the article in the portal.

**Publication and Issue** Displays the publication and issue where this article will appear.

|  |   |
|--|---|
| <b>ID</b>                                  | Displays the unique value entered on the Search page.<br>An ID is a key field and it cannot be altered after it is entered. |
| <b>Sequence number</b>                     | Enter the article sequence number to specify the order in which you want the article to appear in the section.              |
| <b>Title, Sub Title, and Author</b>        | Enter the article title, subtitle, and the name of the article's author.  |
| <b>Section ID and Category ID</b>          | Choose the publication section and category where this article will appear.   |
| <b>Title Image ID and Article Image ID</b> | Enter the title and article image IDs for this article.   |

## Adding Article Text

Access the Article Text page (select Portal Administration, Pagelets, Web Magazine, Articles; and select the Article Text tab).

Article
Article Text

## Article

**Publication:** PeopleTalk Online Magazine

**Issue:** June - August 2000

**Summary**

To stay ahead of their customers' demand curve, FedEx depends on cutting-edge technology. And for financial and human resources systems, that technology includes PeopleSoft.

**Body**

Even in today's rewed up economy, Federal Express Corporation faces business challenges that border on the extreme. FedEx handles millions of packages for millions of customers around the world. And when express delivery is necessary, there's little room for inefficiency or apologies. A tough and competitive environment for sure but one that, according to Robert B. Carter, Executive Vice President and Chief Information Officer for FedEx Corp., "makes the game a little more fun."

Article Text page

**Summary** Enter summary text for this article.

**Body** Enter the full article in plain text or HTML format.

---

## Working With the Web Magazine Pagelet

Access the Web Magazine pagelet (click the Content link from the menu bar on the homepage and then select the Web Magazine option in the Personalize Content page).



### Web Magazine pagelet

The Web Magazine pagelet lists current and historical issues under a publication heading. Issues are sorted in descending order according to the effective date of the issue. The pagelet does not list all back issues because it lists a maximum of five issues by default. You can customize the pagelet by altering the iScript PeopleCode.

If no issues exist for a publication, the text *No Issues Available* appears.

## Appendix A

# Creating Custom Templates for Web Magazines

This appendix discusses how to:

- Construct templates for cover pages.
- Display articles in a section.
- Display articles.

---

## Constructing Templates for Cover Pages

To construct a template for a Web Magazine cover page:



```
        </font>
      </tr>
    </table>

</td>
</tr>
</table>

<!-- Footer -->
<TABLE BORDER="1" CELLPADDING="0" CELLSPACING="0" WIDTH="760">
<TR>
<TD>
%BIND(:5)
</TD>
</TR>
</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools, and save the object.
3. Add the appropriate BIND parameters to each cell in the HTML object for your template.
4. Save the HTML object in PeopleTools.
5. Open the record WEBLIB\_WEBPUB in PeopleTools.
6. Navigate to the record PeopleCode for the field EO\_PE\_TEMPLATES.

Edit this PeopleCode as needed.

## 7. Call functions to get the values for the bind variables.

- a. Under the function `IScript_WebPublishing`, add the appropriate functions to bind values to the values that you have set up in your HTML object (the cover page template).

In the following example, we show how to bind a value to the fourth bind variable. The fourth bind variable in the article template represents the articles for the section *INDUSTRY*. A function is delivered with Web Magazine feature to get the article listing for a section. This function is called `IScript_GetSectionArticles`.

- b. From the `PeopleCode` in `IScript_WebPublishing`, call the function `IScript_GetSectionArticles` and set it to a string variable.

In our example, we set the return value of the function to the variable `&IndustryFocus`.

Example:

```
rem;
rem   Get the Articles for the INDUSTRY;
rem;
rem   Parameters Values for the Function Call;
rem   Number      Description          Value
rem   -----
rem   1           Number of Columns    3
rem   2           FontSize             1
rem   3           Section Title On     0 (FALSE)
rem   4           Category Title On    1 (TRUE)
rem   5           ArticleSummary On    0 (FALSE)
rem   6           More... On           0 (FALSE)
rem   7           Section Name         "INDUSTRY"
rem;
&IndustryFocus = IScript_GetSectionArticles(3, 1, 0, 1, 0, 0, "INDUSTRY");
```

## 8. Bind function values to the HTML object (cover page template).

Specifically, bind `&IndustryFocus` into our HTML object (cover page template) using the function `GetHTMLText`.

This function takes our HTML object (cover page template), which was saved as `EO_PE_FRONTPAGETEMPLATE`, and binds the bind values into it. These values must occur in the order in which they were specified in the HTML object. The variable `&IndustryFocus` is listed fourth because it is the fourth bind variable.

Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1,
&CompanyNews, &IndustryFocus, &HTMLFooter, &articleURL, &sectionURL, IScript_GetImage("PWSH507PO8C"), IScript_GetImage("PWSEP6SXO8C"), IScript_GetImage("PWSPS3TQO8C"), IScript_GetImage("PWS4MT7QO8C"), IScript_GetImage("PWSTRUTPO8C"), IScript_GetImage("PWSPB7CPO8C"), IScript_GetImage("PWSYBONQO8C"), IScript_GetImage("PWS5JA6S59C"), IScript_GetImage("PWS24J8F44C"));
```

## 9. Include the cover page template in the portal.

10. Repeat the process and bind additional cells within the HTML object (cover page template).

For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values.

## Displaying Articles in a Section

Use the section page layout to display the articles in a particular section of the publication. On the section page, the title bar and navigation bar appear with the section navigation bar.

You can use the section navigation bar to access all sections in the publication. In the following example, the navigation bar appears only on the section page and the article page. However, you can also place it in the cover page layout.

The screenshot shows the PeopleTalk ONLINE website interface. At the top, it displays 'PeopleTalk ONLINE' and the date 'June - August 2000'. A navigation bar includes links for 'Home', 'PeopleSoft.com', 'NEWS', 'COVER STORY', 'CEO CONVERSATION', 'eCENTER', 'VANTIVE VOICE', 'INDUSTRY FOCUS' (which is highlighted), and 'INSIDE SCOOP'. The main content area is titled 'Industry' and is divided into several columns of articles:

- Service Industries:** [PeopleSoft Supports Virtual Crestone](#). Crestone International makes managing a distributed, virtual organization of consultants a reality with PeopleSoft Professional Services Automation.
- Manufacturing:** [JPM Company Aces Quick Response to Customers](#). JPM Company, a global manufacturer of cable assemblies and wire harnesses for OEMs, uses PeopleSoft to create leaner, faster systems for issuing quotes, promising delivery dates, and fulfilling orders.
- Communications:** [Bell Atlantic Calls on PeopleSoft to Manage Growth](#). By consolidating the company's entire financial, human resource, and supply and logistics systems on PeopleSoft, Bell Atlantic stays agile at acquisitions and mergers.
- Communications:** [Colorado Springs Steps Into the e-Future](#). With public education becoming a very competitive industry, PeopleSoft enables the Colorado Springs School District to compete with private and charter schools while stepping into the future of public sector eBusiness.
- Financial Services:** [GuideOne Insurance Gains an Edge](#). GuideOne uses PeopleSoft's detailed implementation methodology to rapidly implement their HR system and gets a bonus--standardized business processes and procedures that eliminate redundancy and errors.
- Distribution:** [PeopleSoft Keeps FedEx Ahead of the Curve](#). To stay ahead of their customers' demand curve, FedEx depends on cutting-edge technology. And for financial and human resources systems, that technology includes PeopleSoft.
- Higher Education:** [Santa Clara University Upgrades an Aging Infrastructure](#). Santa Clara University relies on PeopleSoft's Early Success Program to keep on the cutting edge of technology while maintaining a lean ERP team.
- Utilities:** [Chugach Electric Powers Into New Markets](#). PeopleSoft gives Chugach Electric the ability to continue leading the utilities industry in Alaska and to be flexible enough to enter new business ventures rapidly.

Example of a section page with a section navigation bar

To construct a template for a Web magazine section:

1. Design the template in HTML.

Before creating the template, decide on the page design and break it up into table cells.

Code example:

```

<HTML>
<HEAD>
<TITLE> PeopleTalk: Home Page </TITLE>
<meta name="keyword" content="PSA Professional Services Automation">

<style type="text/css">

A:HOVER {
    font-family : Arial, Helvetica, sans-serif;
    color: #FF0066;
}

A:LINK {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
}

A:VISITED {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
}

.bodytext {
    font-family : Arial, Helvetica, sans-serif;
    font-size : 10pt;
    color : #000000;
    background-color : #FFFFCC;
}

</style>

</HEAD>

<BODY>

<TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760">

<!-- Header -->
<TR>
<TD>
%BIND(:1)
</TD>
</TR>

<!-- Navigation Bar 1 -->
<TR>
<TD>
%BIND(:2)
</TD>
</TR>

<!-- Navigation Bar 2 -->
<TR>
<TD BACKGROUND="%BIND(:3)">
%BIND(:4)
</TD>
</TR>

<!-- Section Image -->
<TR>
<TD>

```

```

        <TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760" BGCOLOR=>
"#FFFFCC">
        <TR>
        <TD class="bodytext">
        %BIND(:5)
        </TD>
        </TR>
        </TABLE>
</TD>
</TR>

<!-- Section Articles -->
<TR>
<TD>
        <TABLE class="bodytext" BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH=
"760" BGCOLOR="#FFFFCC">
        <TR>
        <TD>
        %BIND(:6)
        </font>
        </TD>
        </TR>
        </TABLE>
</TD>
</TR>
<!-- Footer -->
<TR>
<TD>
%BIND(:7)
</TD>
</TR>

</TABLE>

</BODY>
</HTML>

```

2. Place this HTML code within an HTML object in PeopleTools.
3. Add the appropriate BIND parameters to each cell in the HTML object for the template.
4. Save the HTML object in PeopleTools.
5. Open the record WEBLIB\_WEBPUB in PeopleTools.
6. Navigate to the record PeopleCode for the field EO\_PE\_TEMPLATES.  
Edit the PeopleCode as appropriate.

7. Call functions to get the values for the BIND variables.

- a. Under the function **IScript\_SectionArticleTemplate**, add the appropriate functions to bind values to the values that you have set up in your HTML object (the article template).

In the following example, we show you how to bind a value to the sixth bind variable. The sixth cell in the article template represents an article listing for all articles in the section. A function is included with Web Magazine that gets all the articles for a section. This function is called **IScript\_GetSectionArticles**.

- b. From the PeopleCode in **IScript\_SectionArticleTemplate**, call the function **IScript\_GetSectionArticles** and set it to a string variable.

In our example, we set the return value of the function to the variable *&HTMLBody*.

Example:

```
rem;
rem   Get the Articles for the DEFAULT;
rem;
rem   Parameters Values for the Function Call;
rem   Number      Description      Value;
rem   -----
rem   1      Number of Columns      3;
rem   2      FontSize                2;
rem   3      Section Title On        0 (FALSE);
rem   4      Category Title On       1 (TRUE);
rem   5      ArticleSummary On       1 (TRUE);
rem   6      More... On              0 (FALSE);
rem   7      Section Name            ";
rem;
&HTMLBody = IScript_GetSectionArticles(3, 2, 0, 1, 1, 0, "");
```

8. Bind function values to the HTML object (section template).

Bind *&HTMLBody* into HTML object (section template) using the function **GetHTMLText**.

Function **GetHTMLText** takes our HTML object (section template), which was saved as **EO\_PE\_SECTIONTEMPLATE**, and binds into it the six bind values. These values must occur in the order that they were specified in the HTML object. The variable *&HTMLBody* is listed fifth because it is the fifth bind variable.

Example:

```
rem;
rem   Build The Web Page;
rem;
&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1,
  IScript_GetImageFileSpec("PWSA19OE85C"), &HTMLNav2, &HTMLSectionImg, &HTMLBody,
  &HTMLFooter);
```

9. Section the template within the portal.

10. Repeat the process and bind additional cells within the HTML object section template.

For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values.

## Displaying Articles

Use the article page layout to display an article within the publication. You have the freedom to arrange this page as desired. In the following illustration, the article is shown with a title and a side navigation bar that shows all the articles within this section.

**PeopleTalk** ONLINE June - August 2000 CUSTOMERS • EMPLOYEES • SUPPLIERS **PEOPLE**  
People power the internet. **Soft**

Home **PeopleSoft.com**

NEWS COVER STORY CEO CONVERSATION eCENTER VANTIVE VOICE **INDUSTRY FOCUS** INSIDE SCOOP

# Chugach Electric Powers into New Markets

**INDUSTRY FOCUS**

**Service Industries**  
[PeopleSoft Supports Virtual Crestone](#)

**Manufacturing**  
[JPM Company Aces Quick Response to Customers](#)

**Communications**  
[Bell Atlantic Calls on PeopleSoft to Manage Growth](#)

**Communications**  
[Colorado Springs Steps Into the e-Future](#)

Named for the Chugach Mountains rising over Anchorage, Chugach Electric Association is the largest electric company in Alaska, producing more than 65 percent of the power in the state. A member-owned cooperative, Chugach has long supported deregulation of the Alaskan power industry. Since 1998, the fast and innovative company has also aggressively pursued new ventures, including the provision of Internet services, through [www.Chugach.net](http://www.Chugach.net), as well as microwave telecommunications services.

To support these new ventures, the company needed a flexible information system that would more easily provide managers with the information necessary to make better informed strategic business decisions. Chugach needed to move from its mainframe VSAM system to a more flexible computing environment.

More than 40 business people and technical personnel participated in the selection process. "We selected PeopleSoft for its user functionality and its architecture, which promised significant cost savings over the mainframe," says Dave Smith, Director of Information Services, Chugach Electric Association. "But the deciding factor was functionality such as the ability to track multiple business units to support new business ventures. PeopleSoft offered a highly flexible reporting process through its

Example of an article page

To construct a template for a Web magazine article:

## 1. Design the template in HTML.

Before creating a template, decide on the page design and break it up into table cells.

Code example:

```
<HTML>
<HEAD>
<TITLE> PeopleTalk: Home Page </TITLE>
<meta name="keyword" content="PSA Professional Services Automation">
<style type="text/css">

A:HOVER {
    font-family : Arial, Helvetica, sans-serif;
    color: #FF0000;
    text-decoration: none;
}

A:LINK {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
    text-decoration: none;
}

A:VISITED {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
    text-decoration: none;
}

A:HOVER.leftnavlink {
    font-family : Arial, Helvetica, sans-serif;
    color: #FF0000;
    text-decoration: none;
}

A:LINK.leftnavlink {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
    text-decoration: none;
}

A:VISITED.leftnavlink {
    font-family : Arial, Helvetica, sans-serif;
    color: #0000FF;
}

.bodytext {
    font-family : Arial, Helvetica, sans-serif;
    font-size : 10pt;
    color : #000000;
    background-color : #FFFFFF;
}

.blocktext {
    font-family : Arial, Helvetica, sans-serif;
    font-size : 10pt;
    color : #000000;
    background-color : #FFFFFF;
}

</style>
</HEAD>
```

```

<BODY>

<TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760">

<!-- Header -->
<TR>
<TD COLSPAN=2>
%BIND(:1)
</TD>
</TR>

<!-- Navigation Bar 1 -->
<TR>
<TD COLSPAN=2>
%BIND(:2)
</TD>
</TR>

<!-- Navigation Bar 2 -->
<TR>
<TD COLSPAN=2 BACKGROUND="%BIND(:3)">
%BIND(:4)
</TD>
</TR>

<!-- Category Picture -->
<TR>
<TD WIDTH="140" HEIGHT="130">
%BIND(:5)
</TD>

<!-- Article Title Picture -->
<TD WIDTH="620">
%BIND(:6)
</TD>

<!-- Section Articles Navigation Bar -->
<TR>
<TD WIDTH="140" BGCOLOR="#CCFFCC" VALIGN="TOP">
%BIND(:7)
</TD>

<!-- Article Body -->
<TD>
    <table width="100%" border="0" cellspacing="0" cellpadding="8">
    <tr>
    <td class="bodytext">
    %BIND(:8)
    </td>
    </tr>
    </table>

</TD>
</TR>

<!-- Footer -->
<TR>
<TD COLSPAN=2>
%BIND(:9)
</TD>
</TR>

</TABLE>

```

```
</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools.
3. Add the appropriate BIND parameters to each cell in the HTML object for your template.
4. Save the HTML object in PeopleTools.
5. Open the record WEBLIB\_WEBPUB in PeopleTools.
6. Navigate to the record PeopleCode for the field EO\_PE\_TEMPLATES.

Edit this PeopleCode to suit your needs.

7. Call functions to get the values for the bind variables.
  - a. Under the function **IScript\_ArticleTemplate**, add the appropriate functions to bind values to the values you have set up in your HTML object (the article template).

In our example, we will bind a value to the fifth bind variable. The fifth cell in the article template represents the category image. The function **IScript\_GetCategoryImg** is delivered with Web Magazine to get the category image.

- b. From the PeopleCode in **IScript\_ArticleTemplate**, call the function *IScript\_GetCategoryImg* and set it to a string variable.

In our example, set the return value of the function to the variable *&HTMLCategoryImage*.

Example:

```
rem;
rem   Category Image;
rem;
&HTMLCategoryImage = IScript_GetCategoryImg();
```

8. Bind function values to the HTML object (article template).

Bind *&HTMLCategoryImage* into the HTML object (article template) using the function **GetHTMLText**.

This function takes our HTML object (article template), which was saved as EO\_PE\_ARTICLETEMPLATE, and binds into it the bind values. These values must occur in the order in which they were specified in the HTML object. The variable *&HTMLCategoryImage* is listed fourth because it is the fourth bind variable.

Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1,
  IScript_GetImageFileSpec("PWSA19OE
85C"), &HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody,
  &HTMLFooter);
```

9. Register Article Template within the portal.
10. Repeat the process and bind additional cells within the HTML object (article template).

For each bind value, you can add a function, another HTML object, or static text/images. Continue until all the cells of the HTML object have values. When you finish, the page should look like the PeopleTalk page shown in the previous illustration.



## Appendix B

# iScripts Used to Assemble and Present Web Magazines

This appendix provides an overview of Web Magazine iScripts and discusses the iScripts within the Web Magazine hierarchy of:

- Publication
- Section
- Category
- Article
- Image

---

## Understanding Web Magazine iScripts

Before you design a publication, you must understand how the portal assembles the Web Magazine for presentation in the portal. PeopleSoft Enterprise Portal delivers a set of page layouts in the form of HTML objects, including built-in functions that use those HTML objects. Configuring or creating new HTML objects requires that you revise the built-in functions.

In the sections that follow, these typographical conventions distinguish the various elements of the PeopleCode:

<i>Notation</i>	<i>Description</i>
<b>Keyword</b>	Indicates function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Variable</i>	Indicates placeholders for arguments that your program must supply.
...	Indicates that the preceding item or series can be repeated any number of times.
{Option1 Option2}	Indicates a choice between options.

<i>Notation</i>	<i>Description</i>
[ ]	Indicates optional items.
&Parameter	Indicates that the parameter is an already instantiated object.

---

## Publication

This section discusses:

- IScript\_BuildPubHeader
- IScript\_BuildPubNavBar
- IScript\_BuildPubFooter
- IScript\_WebPublishing

## IScript\_BuildPubHeader

### Syntax

```
IScript_BuildPubHeader ( )
```

### Description

IScript\_BuildPubHeader displays the web magazine header for a publication. It uses the publication ID and the issue ID that are passed through the query string. This function then retrieves the current issue name using these parameters and displays it in the header. It's displayed by passing the issue name as a bind variable to the HTML Header Template. Different publications must change the code to call their specific HTML templates for the header.

The declaration is:

```
Declare Function IScript_BuildPubHeader PeopleCode WEBLIB_WEBPUB.EO_PE_PUB FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
ISSUE	The issue ID is set in the query string by <code>ISSUE=Issue ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Issue</code> .

This table lists Other Parameters:

<b>Parameter</b>	<b>Description</b>
<b>HTML.HTML Template</b>	This HTML template is required to display the header for the Web Magazine page. Change this in the code to use the HTML template that you designed.

### Returns

Returns the HTML markup for the entire publication or issue header.

### Example

```
&HTMLHeader = IScript_BuildPubHeader();
```

## IScript\_BuildPubNavBar

### Syntax

```
IScript_BuildPubNavBar()
```

### Description

IScript\_BuildPubNavBar displays the Web magazine navigation bar for a publication. This function retrieves the HTML template for the navigation bar for the publication. The inputs are publication, issue name, and full URL from the %Request parameter. Different publications must change the code to call their specific HTML templates for the navigation bar.

The declaration is:

```
Declare Function IScript_BuildPubNavBar PeopleCode WEBLIB_WEBPUB.EO_PE_PUB FieldFormula;
```

## Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
ISSUE	The issue ID is set in the query string by <code>ISSUE=Issue ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Issue</code> .

This table lists Other Parameter:

<b>Parameter</b>	<b>Description</b>
<b>HTML.HTML Template</b>	This HTML template is required to display the publication navigation bar for the Web Magazine page. Change this in the code to use the HTML template that you designed.
URL	This is the URL from the <code>%Request</code> . This must be an absolute URL, in the following format: Scheme://host:port/path/ For example: <code>http://localhost:8080/servlets/iclientservlet/HR</code> <b>Note.</b> HR is a subdirectory.

## Returns

Returns the HTML markup for the entire publication navigation bar.

## Example

```
&HTMLNav1 = IScript_BuildPubNavBar();
```

## IScript\_BuildPubFooter

### Syntax

```
IScript_BuildPubFooter()
```

### Description

IScript\_BuildPubFooter displays the Web magazine footer for publication. It retrieves the HTML template of the footer for that publication. This is a static HTML template that does not have any bind variables. For different publications, the code must be changed to call the specific HTML template for the footer.

The declaration is:

```
Declare Function IScript_BuildPubFooter PeopleCode WEBLIB_WEBPUB.EO_PE_PUB FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

Query String Parameters: *None*.

This table lists the Other Parameters:

<i>Parameter</i>	<i>Description</i>
<b>HTML.HTML Template</b>	This HTML template is required to display the footer for the Web Magazine page. Change this in the code to use the HTML template that you designed.

### Returns

Returns the HTML markup for the entire publication footer.

### Example

```
&HTMLFooter = IScript_BuildPubFooter();
```

## IScript\_WebPublishing

### Syntax

```
GenerateScriptPortalURL(%Portal,%Node  
/  
Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLATES, "FieldFormula",  
"IScript_WebPublishing");
```

GenerateScriptPortalURL can be used with this function as part of the syntax, but generally the syntax for this iScript is the following:

```
IScript_WebPublishing( )
```

## Description

IScript\_WebPublishing assembles the Web magazine for a publication issue. It uses the publication built-in functions iScripts described previously to produce each value that is required by the cover page template. It is assembled by passing all required parameters as bind variables to the HTML Front Page template.

Customized cover page layouts require changes to the code. For example, if the HTML template has six bind variables; IScript\_WebPublishing must pass six values, including HTML markup returned by other publication built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GenerateHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1,
    &CompanyNews, &IndustryFocus, &HTMLFooter, &ArticleURL, &SectionURL,
    IScript_GetImage("PWSH507P08C"), IScript_GetImage("PWSEP6SX08C"),
    IScript_GetImage("PWSPS3TQ08C"), IScript_GetImage("PWS4MT7Q08C"),
    IScript_GetImage("PWSTRUTP08C"), IScript_GetImage("PWSPB7CP08C"),
    IScript_GetImage("PWSYBONQ08C"), IScript_GetImage("PWS5JA6S59C"),
    IScript_GetImage("PWS24J8F44C"));
```

where:

- EO\_PE\_FRONTPAGETEMPLATE is the cover page layout.
- &HTMLHeader, &HTMLNav1, and &HTMLFooter contain the HTML markup for the header, navigation, and footer portions of the layout.
- &CompanyNews contains the HTML markup for articles for the news section.
- &IndustryFocus contains the HTML markup for articles for the industry section.
- &articleURL is the portal content URL for article template pages.
- &sectionURL is the portal content URL for section template pages.
- IScript\_GetImage() calls are used to build HTML IMG tags for graphics on the page.

## Returns

Returns the HTML markup for the entire publication issue.

## Example

```
<a href=http://host:port/psp/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_
WebPublishing?PUB=PEOPLETALK&ISSUE=JUNAUG2000>PeopleTalk</a>
```

## Section

All articles for an issue are retrieved. All sections where the articles belong are sorted.

This section discusses:

- IScript\_BuildSectionNavBar
- IScript\_GetSectionArticles
- IScript\_GetSectionImg
- IScript\_SectionArticleTemplate

## IScript\_BuildSectionNavBar

### Syntax

```
IScript_BuildSectionNavBar()
```

### Description

IScript\_BuildSectionNavBar builds the section navigation bar for a publication issue. The navigation bar displays all of the sections for a publication issue. It is created with the images that are defined in the section navigation (on and off) images of the application.

If the current section is referenced, the Section Navigation Bar On image is used. If the section referenced is not the current section, the Section Navigation Bar Off image is used.

The declaration is:

```
Declare Function IScript_BuildSectionNavBar PeopleCode WEBLIB_WEBPUB.EO_E_SECTION FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists Query String Parameters:

<i>Parameter</i>	<i>Description</i>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable & <i>Publication</i> .

<i>Parameter</i>	<i>Description</i>
ISSUE	The issue ID is set in the query string by <code>ISSUE=Issue ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Issue</code> .
SECTION	The section ID is set in the query string by <code>SECTION=Section ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Section</code> .

### Returns

Returns the HML markup for the entire section navigation bar.

### Example

```
&HTMLNav2 = IScript_BuildSectionNavBar();
```

## IScript\_GetSectionArticles

### Syntax

```
IScript_GetSectionArticles(&NumberOfColumns, &FontSize, &SectionOn, &CategoriesOn, &ArticlesSummaryOn, &More, &Section)
```

### Description

IScript\_GetSectionArticles displays all articles for a section of a publication issue. All articles are displayed; they use the parameters that are listed in the following table. The output of the articles can be changed.

Features include the number of columns in which the articles are displayed in, font size, section titles (on or off), category titles (on or off), article summaries (on or off), more articles link (on or off), and a section ID override.

The declaration is:

```
Declare Function IScript_GetSectionArticles PeopleCode WEBLIB_WEBPUB.EO_PE_SECTION FieldFormula;
```

### Parameters

This table lists the Function Call Parameters:

<b>Parameter</b>	<b>Description</b>
<i>NumberOfColumns</i>	(Integer) Number of columns in which to display the articles. If this value is 3, three columns display the articles.
<i>FontSize</i>	(Integer) Relative font size in which the output is displayed.
<i>SectionOn</i>	(Integer) If this value is 1 (true), the section name is displayed at the beginning of the article listing. If this value is 0 (false), the section name is not displayed.
<i>CategoriesOn</i>	(Integer) If this value is 1 (true), the category name is displayed at the beginning of each article. If the value is 0 (false), the category name is not displayed.
<i>ArticleSummaryOn</i>	(Integer) If this value is 1 (true), the article summary is displayed after the article title. If the value is 0 (false), the article summary is not displayed.
<i>More</i>	(Integer) If this value is 1 (true) and there are more than three articles, <i>More...</i> appears at the end of the article listing. If the value is 0 (false), the link does not appear.
<i>Section</i>	If a value exists, it overrides the query string parameter value for the section ID. This is useful if there is no query string parameter for the section ID. This value must be the section ID.

This table lists the Query Sting Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
ISSUE	The issue ID is set in the query string by <code>ISSUE=Issue ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Issue</code> .
SECTION	The section ID is set in the query string by <code>SECTION=Section ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Section</code> .

## Returns

Returns the HTML markup for all articles in a section for a publication or an issue.

## Example

```
rem Get the Articles for the news section;
rem Parameters Values for the Function Call;
rem Number of Columns - 1;
rem Font Size - 2;
rem Section Title On - 0 (False);
rem Category Title On - 0 (False);
rem Article Summary On - 1 (True);
rem More... link - 0 (False);
rem Section Name - "" (current section);
&HTMLText = IScript_GetSectionArticles(1, 2, 0, 0, 1, 0, " ");
```

## IScript\_GetSectionImg

### Syntax

```
IScript_GetSectionImg()
```

### Description

IScript\_GetSectionImg retrieves the section image for a section of a publication. It accepts inputs from the query string for the publication ID and the section ID. IScript\_GetSectionImg first retrieves the section image ID. Using this ID, it calls the IScript\_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetSectionImg PeopleCode WEBLIB_WEBPUB.EO_PE_SECTION FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
SECTION	The section ID is set in the query string by SECTION= <i>Section ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Section.

## Returns

Returns the HTML image tag for the section image.

## Example

```
&HTMLSectionImg = IScript_GetSectionImg();
```

## IScript\_SectionArticleTemplate

### Syntax

```
GetScriptContentURL(%Portal, %Node, Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLATES,
  "FieldFormula", "IScript_SectionArticleTemplate");
```

GenerateScriptPortalURL can be used with this function as part of the syntax, but generally the syntax for this iScript is the following:

```
IScript_SectionArticleTemplate
```

### Description

IScript\_SectionArticleTemplate assembles the section page for a publication issue. It uses the section built-in functions iScripts described previously to come up with each value that is required by the section page template. Passing all required parameters as bind variables, to the HTML Section Page template, assembles it.

Changes to the code are required when customizing section page layouts. For example, if the HTML template has six bind variables, IScript\_SectionArticleTemplate must pass six values, including HTML markup returned by other section built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1,
  IScript_GetImageFileSpec("
  PWSA190E85C"), &HTMLNav2, &HTMLSectionImg, &HTMLBody, &HTMLFooter);
```

where:

- EO\_PE\_SECTIONTEMPLATE is the section page layout.
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and &HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portions of the layout.
- &HTMLSectionImg contains the HTML markup for the section image; &HTMLBody contains the HTML markup for all articles for the current section.
- IScript\_GetImageFileSpec() calls are used to retrieve the image file path and file name from the database.

---

**Note.** If you have a different page layout for every section in a publication, you must edit IScript\_SectionArticleTemplate to use the appropriate HTML object (section layout), depending on the publication section.

---

## Parameters

None.

## Returns

Returns the HTML markup for a section in a publication issue.

## Example

```
<a href="http://jwegrzyn070500/psc/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_SectionArticleTemplate?PUB=PEOPLETALK&ISSUE=
JUNAUG2000&SECTION=NEWS">News</a>
```

---

## Category

This section discusses:

- IScript\_GetCategoryLongName
- IScript\_GetCategoryImg

## IScript\_GetCategoryLongName

### Syntax

```
IScript_GetCategoryLongName ( )
```

### Description

IScript\_GetCategoryLongName retrieves the category long name for a category in a section of a publication. It accepts inputs from the query string for the publication ID, section ID, and category ID.

The declaration is:

```
Declare Function IScript_GetCategoryLongName PeopleCode WEBLIB_WEBPUB.EO_PE_
CATEGORY FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
SECTION	The section ID is set in the query string by <code>SECTION=Section ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Section</code> .
CATEGORY	The category ID is set in the query string by <code>CATEGORY=Category ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Category</code> .

## Returns

Returns the category long name.

## IScript\_GetCategoryImg

### Syntax

```
IScript_GetCategoryImg ( )
```

### Description

IScript\_GetCategoryImg retrieves the category image for a category in a section of a publication. It accepts inputs from the query string for the publication ID, section ID, and category ID. IScript\_GetCategoryImg first retrieves the category image ID. Using this ID, it calls the IScript\_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetCategoryImg PeopleCode WEBLIB_WEBPUB.EO_PE_CATEGORY  
FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
SECTION	The section ID is set in the query string by <code>SECTION=Section ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Section</code> .
CATEGORY	The category ID is set in the query string by <code>CATEGORY=Category ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Category</code> .

## Returns

Returns the HTML image tag for the category image.

## Article

This section discusses:

- `IScript_GetArticleTitle`
- `IScript_GetArticleTitleImage`
- `IScript_GetArticleSubTitle`
- `IScript_GetArticleBody`
- `IScript_GetArticleImage`
- `IScript_GetArticleAuthor`
- `IScript_ArticleTemplate`

## IScript\_GetArticleTitle

### Syntax

```
IScript_GetArticleTitle()
```

## Description

IScript\_GetArticleTitle retrieves the article title for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function IScript_GetArticleTitle PeopleCode
WEBLIB_WEBPUB.EO_PE_ARTICLE FieldFormula;
```

## Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<i>Parameter</i>	<i>Description</i>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The issue ID is set in the query string by ISSUE= <i>Issue ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The article ID is set in the query string by ARTICLE= <i>Article ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

## Returns

Returns the article title.

## IScript\_GetArticleTitleImage

### Syntax

```
IScript_GetArticleTitleImage ( )
```

## Description

IScriptGetArticleTitleImage retrieves the article title image for an article in an issue of a publication. It retrieves inputs from the query string for the publication ID, issue ID, and article ID.

IScript\_GetArticleTitleImage first retrieves the article title image ID. Using this ID, it calls the IScript\_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetArticleTitleImage PeopleCode WEBLIB_WEBPUB.EO_PE_
ARTICLE FieldFormula;
```

## Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by <code>PUB=Publication ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Publication</code> .
SECTION	The section ID is set in the query string by <code>SECTION=Section ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Section</code> .
CATEGORY	The category ID is set in the query string by <code>CATEGORY=Category ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Category</code> .
ISSUE	The Issue ID is set in the query string by <code>ISSUE=Issue ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Issue</code> .
ARTICLE	The article ID is set in the query string by <code>ARTICLE=Article ID</code> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable <code>&amp;Article</code> .

## Returns

Returns the HTML image tag for the article title image.

## Iscript\_GetArticleSubTitle

### Syntax

```
Iscript_GetArticleSubTitle()
```

### Description

Iscript\_GetArticleSubTitle retrieves the article subtitle for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function Iscript_GetArticleSubTitle PeopleCode WEBLIB_WEBPUB.EO_PE_ARTICLE FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID is set in the query string by ISSUE= <i>Issue ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The article ID is set in the query string by ARTICLE= <i>Article ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

### Returns

Returns the article subtitle.

## Iscript\_GetArticleBody

### Syntax

```
Iscript_GetArticleBody()
```

### Description

Iscript\_GetArticleBody retrieves the article body text for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function Iscript_GetArticleBody PeopleCode WEBLIB_WEBPUB.EO_PE_ARTICLE  
FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID is set in the query string by ISSUE= <i>Issue ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The article ID is set in the query string by ARTICLE= <i>Article ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

### Returns

Returns the article body text.

## IScript\_GetArticleImage

### Syntax

```
IScript_GetArticleImage()
```

### Description

IScript\_GetArticleImage retrieves the article image for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID. IScript\_GetArticleImage retrieves the article image ID. Using this ID, it calls the IScript\_GetImage function to retrieve the image information.

The declaration is:

```
Declare Function IScript_GetArticleImage PeopleCode WEBLIB_WEBPUB.EO_PE_ARTICLE  
FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID is set in the query string by ISSUE= <i>Issue ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The article ID is set in the query string by ARTICLE= <i>Article ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

### Returns

Returns the HTML image tag for the article image.

## IScript\_GetArticleAuthor

### Syntax

```
IScript_GetArticleAuthor()
```

### Description

IScript\_GetArticleAuthor retrieves the article author for an article in an issue of a publication. It accepts inputs from the query string for the publication ID, issue ID, and article ID.

The declaration is:

```
Declare Function IScript_GetArticleAuthor PeopleCode WEBLIB_WEBPUB.EO_PE_ARTILE  
FieldFormula;
```

### Parameters

Function Call Parameters: *None*.

This table lists the Query String Parameters:

<b>Parameter</b>	<b>Description</b>
PUB	The publication ID is set in the query string by PUB= <i>Publication ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID is set in the query string by ISSUE= <i>Issue ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The article ID is set in the query string by ARTICLE= <i>Article ID</i> . The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

### Returns

Returns the article author.

## IScript\_ArticleTemplate

### Syntax

```
GetScriptContentURL(%Portal, %Node, Record.WEBLIB_WEBPUB, Field.EO_PE_TEMPLATES,
  "FieldFormula", "IScript_ArticleTemplate");
```

Same comments as above.

### Description

IScript\_Article\_Template assembles the article page for a section of a publication issue. It uses the article built-in functions described previously to produce each value that is required by the article page template. Passing all required parameters as bind variables to the HTML Article Page template assembles it.

Customized article page layouts require changes to the code. For example, if the HTML template has eight bind variables, IScript\_GetArticleTemplate must pass eight values, including HTML markup returned by other page built-in functions, to match. Using examples from previous sections, we have:

```
&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1,
  IScript_GetImageFileSpec("
PWSA19OE85C"), &HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody,
  &HTMLFooter);
```

where:

- EO\_PE\_ARTICLETEMPLATE is the article page layout.
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portions of the layout.
- &HTMLNav3 is the side navigation bar that lists articles for the current section.
- &HTMLCategoryImage contains the HTML markup for the category image.
- &HTMLTitle is the article title image.
- &HTMLBody contains the HTML markup of the article image, text, and author.
- IScript\_GetImageFileSpec() calls are used to retrieve the image file path and file name from the database.

### Returns

Returns the HTML markup for an article in a section of a publication issue.

### Example

```
<a href="http://jwegrzyn070500/psc/ps/EMPLOYEE/PSFT_PA/s/WEBLIB_WEBPUB.EO_PE_
TEMPLATES.FieldFormula.IScript_ArticleTemplate?PUB=PEOPLETALK&ISSUE=
JUNAug2000&SECTION=INDUSTRY&CATEGORY=COMMUNICATE&ARTICLE=COSPRINGS">Article
Title</a>
```

---

## Image

This section discusses:

- IScript\_GetImage
- IScript\_GetImageFileSpec

## IScript\_GetImage

### Syntax

```
IScript_GetImage (&ImageID)
```

### Description

IScript\_GetImage retrieves the image tag for an image ID. The image ID is retrieved, and all of the parameters surrounding the image are placed in the image tag.

The declaration is:

```
Declare Function IScript_GetImage PeopleCode WEBLIB_WEBPUB.EO_PE_IMAGE Field  
Formula;
```

### Parameters

Function Call Parameters:

<i>Parameter</i>	<i>Description</i>
<i>ImageID</i>	Specify the image ID for the image that you want to retrieve.

Query String Parameters: *None*.

### Returns

Returns the HTML image tag.

## IScript\_GetImageFileSpec

### Syntax

```
IScript_GetImageFileSpec (ImageID)
```

## Description

IScript\_GetImageFileSpec retrieves the file path and file name for an image ID. The image ID is retrieved, and the path and file name are concatenated.

The declaration is:

```
Declare Function IScript_GetImageFileSpec PeopleCode WEBLIB_WEBPUB.EO_PE_IMAGE  
FieldFormula;
```

## Parameters

This table lists the Function Call Parameters:

<b>Parameter</b>	<b>Description</b>
<i>ImageID</i>	Specify the image ID for the image that you want to retrieve.

Query String Parameters: *None*.

## Returns

Returns the concatenated file path and file name.



## Appendix C

# Performing Content Autocategorization

This appendix provides overviews of the autocategorization process and setup tasks, and discusses how to:

- Define autocategorization engine vocabularies.
- Perform autocategorization.

---

**Note.** PeopleSoft Enterprise Portal does not include an autocategorization engine. However, integrating one is relatively straightforward. Before performing content autocategorization, you must install an engine.

---

---

## Understanding the Autocategorization Process

Multiple autocategorization engines can be configured and used. An engine must be accessible by HTTP GET or POST. The HTTP request would typically target an adapter object that maps the generic autocategorization input parameters to the proprietary interface of a specific engine.

The following table describes the input query parameters to the autocategorization engine.

---

**Note.** Certain autocategorization engines may not use all of these parameters. The valid range of values for parameters may vary.

---

<i>Parameter</i>	<i>Description</i>
DOC	The URL of the document to be classified.
DOC_TYPE	The engine-specific code which indicates that the DOC parameter refers to a URL. This may be necessary for engines that support alternatives, such as sending the entire contents of the document instead of just the URL.
HIERARCHY	The vocabulary into which the document should be classified. This is the same value that you specify in the Vocabulary field when you define vocabularies on the Autocategorization Vocabularies page.
MAX_CATS	The maximum number of categories into which you can classify documents.
THRESHOLD	The minimum confidence ranking required for a document to be classified within a category.

<i>Parameter</i>	<i>Description</i>
USERID	The user ID to use when accessing the autocategorization engine.
PASSWORD	The password to use when accessing the autocategorization engine.

The output of the autocategorization request should be a simple text array of classification definitions in the following format. Each element of the array represents a separate classification for the same document. A space character separates element pairs.

```
<confidence score>,<category name or error message>
```

The confidence score should be a signed integer that conforms to the ranking scheme of the engine. A confidence score of -1 should denote errors.

For example, output from a successful call to an engine might look like this:

```
.23,/business/bus_law .18,/computers/internet .17,/business/industry/tech
```

The output from an unsuccessful call might look like this:

```
-1,Server Not Responding; Engine May Not Be Running.
```

The PeopleSoft Enterprise Portal provides sample ASP and Java servlet adapters as templates:

- \$PS\_HOME/web/integration/autoclassify.asp
- \$PS\_HOME/web/integration/AutoCatEJBServlet.java
- \$PS\_HOME/web/integration/AutoCatNativeServlet.java

The templates illustrate how to access the input parameters of the autocategorization request, forward them to sample autocategorization engines, and then format and return the engines' responses.

The ASP template demonstrates how to integrate with a Component Object Model interface; the servlets show how to integrate with an Enterprise JavaBeans or custom C interface.

---

## Understanding Autocategorization Setup Tasks

This section provides a summary of the tasks required to perform autocategorization.

---

**Note.** The categorization spider is used to perform the autocategorization process.

---

To perform autocategorization:

1. Define autocategorization engine vocabularies.

This task enables you to set up meaningful names for different vocabularies within an autocategorization engine. Some engines use codes for different vocabularies, such as a number. Assigning a name within Content Categorization enables an administrator to refer to that vocabulary in a more meaningful way.

See [Appendix C, "Performing Content Autocategorization," Defining Autocategorization Engine Vocabularies, page 343.](#)

2. Define content sources on the Run Categorization Spider page.

This is the where the spider will locate content.

See [Chapter 6, "Running the Content Categorization Spider," Creating a Spider Run Control Entry, page 183.](#)

3. Create taxonomies.

This is where you create your taxonomy and connect the defined content source to the taxonomy. The top folder name should correspond to the autocategorization engine vocabulary name. Information entered to establish the content source for your taxonomy is based on the content source defined using the Run Categorization Spider page.

This table shows how to complete the Content Source page:

<i>Spider Source Fields</i>	<i>Values</i>
Source Type	Auto Categorized File Server.
Source Name	Select the source name you entered on the Run Categorization Spider page.
Source Path	This value is automatically filled with the URL you entered on the Run Categorization Spider page for the selected source name.
Auto Expand Folder	Allows for subfolders to be created automatically.  <b>Note.</b> Auto-created folders cannot have content added manually or added automatically from other content sources.

See [Chapter 5, "Setting Up and Working with Categorized Content," Maintaining Folder Properties for Categorized Content, page 156.](#)

---

## Defining Autocategorization Engine Vocabularies

This section discusses how to define autocategorization engine vocabularies.

## Defining Autocategorization Engine Vocabularies

Access the Autocategorization Engine Vocabulary Definition page (EPPCM\_SPIDR\_VOC) (select Content Management, Categorized Contents, Autocategorization).

**Autocategorization Engine Vocabulary Definition**

\*Name:

\*URL:

Summary:

Autocategorization Vocabularies		Customize	Find	First	1 of 1	Last
	*Vocabulary Name	Long Description				
1	NEWS	News Publications				

Autocategorization Engine Vocabulary Definition page

Use the Autocategorization Engine Vocabulary Definition page to set the Autocategorization vocabulary used in categorizing content.

- Name** Enter the name of the autocategorization engine.
- URL** Enter the autocategorization engine's URL.
- Vocabulary Name and Long Description** Enter a name that is used by the autocategorization engine for a taxonomy into which it can classify documents. The description appears on the Content Categorization pages to help identify the vocabulary.

---

## Performing Autocategorization

After the taxonomy has been created and content sources have been mapped, the spider can be invoked.

## Appendix D

# Understanding Content Management Tables

This appendix discusses the tables that support:

- All content management features.
- Categorized content.

---

**Note.** The tables in this appendix identify all basic tables that are used in the Content Management system, as well as important cautionary notes. This list is not intended to be exhaustive, as it does not identify views or work records.

---

---

## All Content Management Features

The following tables are used by all features. Related language records are also available.

### Folder Tables

The following tables pertain to folders:

<i>Table</i>	<i>Description</i>	<i>Notes</i>
EPPCM_CATEGORY	Folders.	Not applicable.

<b>Table</b>	<b>Description</b>	<b>Notes</b>
EPPCM_CATG_TYPE	Folder types. Different folder types allow for different rules regarding how the components render and are used.	Valid folder types are: <ul style="list-style-type: none"> <li>• <i>B</i>: Categorized Content.</li> <li>• <i>C</i>: Related information.</li> <li>• <i>D</i>: Discussion forum.</li> <li>• <i>E</i>: Collaborative workspace.</li> <li>• <i>N</i>: News publications.</li> <li>• <i>R</i>: Managed content.</li> <li>• <i>S</i>: Menu items.</li> <li>• <i>T</i>: Manage navigation.</li> <li>• <i>W</i>: Pagelet wizard.</li> <li>• <i>A</i>: Action items.</li> <li>• <i>L</i>: Calendar events.</li> </ul>
EPPCM_CATG_CONT	Folder content relationship.	Not applicable.
EPPCM_CATG_SITE	Folder type by site.	Overrides a select set of values by site for the feature.
EPPCM_CONT_SITE	Content type by site.	Overrides by site the available content types to add.
EPPCM_COMP_TYPE	Folder type components.	Associates the feature or component type to the menu, component, and page. It also sets the page display values for that feature or component type.
EPPCM_CONT_TYPE	Content type available by feature and component type.	Lists available content types that can be added to the given feature on the given component type.
EPPCM_DFLT_URL	Default URL used to locate file storage location.	Not applicable.

<b>Table</b>	<b>Description</b>	<b>Notes</b>
EPPCM_CATG_MEM	Folder member assignment.	Related: PSOPRDEFN and PSROLEDEFN. Implements row-level security for folder content.
EPPCM_CATG_VWR	Folder viewer assignment.	Viewer roles for published content within the folder.
EPPCM_CONT_VWR	Content viewer assignment.	Viewer roles for published content.
EPPCM_CATG_ATTR	Folder attributes.	Not applicable.
EPPCM_TPCATGADM	Top administrator assignments by feature.	Not applicable.
EPPCM_PRIVILEGE	Privilege set definition for the feature.	Determines actions available to the user. The defined privilege set is stored in the EPPCM_CATG_MEM table, which implements row-level security for folder content.
EO_PE_OPTIONS	Holds the next available category or content ID.	<b>Warning!</b> These IDs are system-assigned and consequently make moving Content Management-related categories and content from one database to another ill advised.

## Content Tables

The following tables pertain to content:

<b>Table Name</b>	<b>Description</b>	<b>Comments</b>
EPPCM_CONTENT	Parent content record, general metadata.	Contains content type indicator.
EPPCM_DOC	Content version details with the content and version ID.	Not applicable.
EPPCM_CONT_ATTR	Content attributes.	Not applicable.

<b>Table Name</b>	<b>Description</b>	<b>Comments</b>
EPPCM_SUBSCRIBR	Subscribe to content privilege is set.	Users with the subscribe privilege can add or delete Managed Content members as interested parties.
EPPCM_IMAGE	Content version details with the content and version ID.	Used only by the Managed Content feature.
EPPCM_IMAGEUPL	Content image upload.	Not applicable.
EPPCM_HTMLTEXT	Content version details with the content and version ID.	Not applicable.
EPPCM_URL	Content version details with the content and version ID.	Not applicable.
EPPCM_CREF	Content version details with the content and version ID.	Used for the Menu Item content type.
EPPCM_DOCINDB	BLOB record.	Repository for documents that are stored in the database instead of on an FTP file server.

---

## Categorized Content

The following table lists the additional tables required by:

<b>Table</b>	<b>Description</b>	<b>Notes</b>
EPPCM_CATG_ATTR	Folder attributes, such as manual or automatically created.	Not applicable.
EPPCM_CONT_ATTR	Content attributes, such as manual versus auto-created.	Not applicable.
PS_EPPCM_SPIDR_AET	Run control state for the Content Categorization Spider application engine.	Not applicable.

<b>Table</b>	<b>Description</b>	<b>Notes</b>
PS_EPPCM_SPIDR_IDS	Content categorization spider application engine program content ID work table.	Not applicable.
PS_EPPCM_SPIDR_LGS	Content categorization spider application engine program search index languages.	Not applicable.
PS_EPPCM_SPIDR_RUN	Content categorization spider run control table.	Not applicable.
PS_EPPCM_SPIDR_DTL	Folder spider properties, such as folder mappings.	Not applicable.



## Appendix E

# Using Integration Broker for Content Migration

This appendix discusses how to:

- Verify service operation and add routing for REQUEST message in the source database.
- Verify service operation, routing, and handler for REQUEST message in the target database.
- Verify service operation and add routing for RESPONSE message in the target database.
- Verify service operation, routing, and handler for RESPONSE message in the source database.
- Verify service operation and add routing for PREVIEW message in the source database.
- Verify service operation, routing, and handler for PREVIEW message in the target database.
- Set the target node to *Segment Aware* in the source database.

---

**Note.** Permission list PAPP2050 provides access to the Content Migration function.

You must configure Integration Gateway and set up single sign-on between the source and target nodes before using the Content Migration function.

---

---

## Verifying Service Operation and Adding Routing for REQUEST Message in the Source Database

To verify service operation and add routing for REQUEST message in the source database:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Open the service operation *EPPCM\_MIG\_RQST*.
3. In the General page, verify the service operation with the following values:

<i>Field</i>	<i>Value</i>
Active	<Selected>
Message.Version	<i>EPPCM_MIG_RQST.VERSION_1</i>
Queue Name	<i>EPPCM_MIGRATE_CONTENT</i>

4. Click the Service Operation Security link.
5. Verify the permission list PAPP2050 is set to *Full Access*.
6. Select the Routings tab and add a row for an Outbound routing from the source node to the target node.

---

## Verifying Service Operation, Routing, and Handler for REQUEST Message in the Target Database

To verify service operation, routing, and handler for REQUEST message in the target database:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Open the service operation *EPPCM\_MIG\_RQST*.
3. In the General page, verify the service operation with the following values:

<i>Field</i>	<i>Value</i>
Active	<Selected>
Message.Version	<i>EPPCM_MIG_RQST.VERSION_1</i>
Queue Name	<i>EPPCM_MIGRATE_CONTENT</i>

4. Click the Service Operation Security link.
5. Verify the permissions list PAPP2050 is set to *Full Access*.
6. Select the Handlers tab and verify a row with the following values:

<i>Field</i>	<i>Value</i>
Name	<i>RequestHandler</i>
Type	<i>OnNotify</i>
Implementation	<i>Application Class</i>

- Click the Details link and verify the application class with the following values:

<i>Field</i>	<i>Value</i>
Package Name	<i>EPPCM_MIG_RQST</i>
Path	:
Class ID	<i>RequestHandler</i>
Method	<i>OnNotify</i>

- Select the Routings tab and add an Inbound routing from the source node to the target node, if none exists.

---

## Verifying Service Operation and Adding Routing for RESPONSE Message in the Target Database

To verify service operation and add routing for RESPONSE message in the target database:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
- Open service operation *EPPCM\_MIG\_RESP*.
- In the General page, verify the service operation with the following values:

<i>Field</i>	<i>Value</i>
Active	<Selected>
Message.Version	<i>EPPCM_MIG_RESP.VERSION_1</i>
Queue Name	<i>EPPCM_MIGRATE_CONTENT</i>

- Click the Service Operation Security link.
- Verify the permission list PAPP2050 is set to *Full Access*.
- Select the Routings tab and add a row for an Outbound routing from the target node to the source node.

---

## Verifying Service Operation, Routing, and Handler for RESPONSE Message in the Source Database

To verify service operation, routing, and handler for RESPONSE message in the source database:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

2. Open the service *EPPCM\_MIG\_RESP*.
3. In the General page, verify the service operation with the following values:

<b>Field</b>	<b>Value</b>
Active	<Selected>
Message.Version	<i>EPPCM_MIG_RESP.VERSION_1</i>
Queue Name	<i>EPPCM_MIGRATE_CONTENT</i>

4. Click the Service Operation Security link.
5. Verify the permission list PAPP2050 is set to *Full Access*.
6. Select the Handlers tab and verify a row with the following values:

<b>Field</b>	<b>Value</b>
Name	<i>RequestHandler</i>
Type	<i>OnNotify</i>
Implementation	<i>Application Class</i>

7. Click the Details link and verify the application class with the following values:

<b>Field</b>	<b>Value</b>
Package Name	<i>EPPCM_MIG_RESP</i>
Path	:
Class ID	<i>RequestHandler</i>
Method	<i>OnNotify</i>

8. Select the Routings tab and add an Inbound routing from the target node to the source node, if none exists

---

## Verifying Service Operation and Adding Routing for PREVIEW Message in the Source Database

To verify service operation and add routing for PREVIEW message in the source database:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Open the service operation *EPPCM\_MIG\_PREVIEW\_SYNC*.

- In the General page, verify the service operation with the following values:

<b>Field</b>	<b>Value</b>
Active	<Selected>
Message Version (of the Request type)	<i>EPPCM_MIG_PREVIEW_SYNC.VERSION_1</i>
Message Version (of the Response type)	<i>EPPCM_MIG_PREVIEW_SYNC.VERSION_1</i>

- Click the Service Operation Security link.
- Verify the permission list PAPP2050 is set to *Full Access*.
- Select the Routings tab and add an active Outbound routing from the source node to the target node.

---

## Verifying Service Operation, Routing, and Handler for PREVIEW Message in the Target Database

To verify service operation, routing, and handler for PREVIEW message in the target database:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
- Open the service operation *EPPCM\_MIG\_PREVIEW\_SYNC*.
- In the General page, verify the service operation with the following values:

<b>Field</b>	<b>Value</b>
Active	<Selected>
Message.Version (of the Request type)	<i>EPPCM_MIG_PREVIEW_SYNC.VERSION_1</i>
Message.Version (of the Response type)	<i>EPPCM_MIG_PREVIEW_SYNC.VERSION_1</i>

- Click the Service Operation Security link.
- Verify the permission list PAPP2050 is set to *Full Access*.
- Select the Handlers tab and verify a row with the following values:

<b>Field</b>	<b>Value</b>
Name	<i>RequestHandler</i>
Type	<i>OnRequest</i>
Implementation	<i>Application Class</i>

- Click the Details link and verify the application class with the following values:

<i>Field</i>	<i>Value</i>
Package Name	<i>EPPCM_MIG_PREVIEW_SYNC</i>
Path	:
Class ID	<i>RequestHandler</i>
Method	<i>OnRequest</i>

- Select the Routings tab and add an active Inbound routing from the source node to the target node.

---

## Setting the Target Node to Segment Aware in the Source Database

Before you can send segmented messages, you must configure the remote node defined on the local system to handle segmented messages by setting the Segment Aware option on the Node Definitions page in the PeopleSoft Pure Internet Architecture.

To set the target node to *Segment Aware* in the source database:

- Select PeopleTools, Integration Broker, Integration Setup, Nodes.
- Open the target node.
- In the Node Definitions page, select the Segment Aware option.
- Save your node definition.

## Appendix F

# Setting Default Approver Role for Content Management

This appendix discusses how to:

- Set the default Content Migration approver role.
- Modify a default Content Migration approver role.

---

## Setting the Default Content Migration Approver Role

To set the default content migration approver role:

1. Select Portal Administration, System Data, Installation Options.
2. Select the Portal and Security Defaults tab.
3. Set the Approver Role field to *PAPP\_CONTENT\_ADMIN*.
4. Save your settings.

---

## Modifying a Default Approver Role

To modify a default approver role:

1. Select Portal Administration, System Data, Installation Options.
2. Select the Portal and Security Defaults tab.
3. Modify the Approver Role field as needed.

For example, modify the approver role from *PAPP\_CONTENT\_ADMIN* to *PAPP\_AUTHORS*.

4. Save your settings.



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