http://docs.oracle.com

Oracle Content Marketing

User Guide

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1 Getting Started

Oracle Content Marketing is a cloud-based content marketing provider that helps companies plan, produce and deliver engaging content across multiple channels throughout their customers' lifecycle.

Customers are increasingly accessing information through online and mobile channels before engaging with a salesperson. This has shifted the buying process from one that is sales-driven to one that is marketing-driven. Now, more than ever, marketers are challenged to deliver relevant and engaging content across multiple channels and throughout the customer lifecycle. Content Marketing's data-driven content marketing platform aligns relevant content with customer data and profiles to help companies more effectively attract prospects, engage buyers, accelerate conversion of prospects to opportunities, increase adoption, and drive revenue growth.

Content Marketing's innovative solution complements Oracle's industry-leading Marketing Cloud, a part of Oracle's comprehensive Customer Experience solution. The combination of Oracle Marketing Cloud with Content Marketing is expected to enable modern marketers to automate content delivery across channels by aligning persona-based content with customers' digital body language to increase "top-of-funnel" customer engagement, improve the quality of sales leads, realize the highest return on their marketing investment, and increase customer loyalty.

Organizations must create the right content for the right person at the right time–delivered through the right channel. Oracle Content Marketing, part of the Oracle Marketing Cloud, makes it easy for everyone in your organization–and even your customers–to create and distribute compelling content across multiple channels to the people you want to reach.

Oracle Content Marketing is driven by the 5 Principles of Content Marketing:

- **Plan**: Define your strategy on a single intuitive content calendar.
- **Produce**: Make it easy to use so everyone in the organization can participate.
- **Publish**: Push content to your website, blog, and marketing automation system.
- **Promote**: Schedule and promote content to any channel including social.
- **Prove**: Quantify to justify with reporting on a content marketing dashboard.

Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

1.1 Configuring planning and organization capabilities

1.1.1 Overview

Configure content planning and organization components within your Content Marketing license to help execute the logistics of your content strategy. To begin configuring your license, see some of the following setup areas:

- Define personas to help guide authors to create relevant content that addresses the needs of the target audience and possible questions to keep in mind as a reference when creating content.
- Create content types to organize and store the content your organization will create.
- Create keyword suggestions to recommend keywords to content authors during authoring.
- Create best practices to remind authors to follow content creation guidelines.
- Create topics and plan ideas for future pieces of content.
- Manage your marketing initiatives and projects as well as the content planned to support those initiatives using the marketing calendar.

1.2 Information about cookies

Oracle Content Marketing uses cookies for multiple reasons. Below are descriptions of the different cookies, who receives them, and why.

Application Cookies: Cookies set for content authors and administrators.

- A cookie is set to retain knowledge of Author credentials. It allows you to remain logged in to the platform and ensure timeouts do not occur while accessing the Oracle Content Marketing platform. Since an HTTP is a stateless protocol, without cookies, an Author would have to submit a username and password every time he or she needed to access the application.
- A cookie is set to retain knowledge of which data center you are accessing. The Oracle Content Marketing application runs in two separate data centers so that even if one zone goes down completely, Oracle Content Marketing can configure the application to keep running at half capacity and avoid a total outage. Session data is not shared between zones, so once you are logged in, your requests must be directed to the same zone each time, and we use a cookie to tag the request accordingly.

Front-End or Blog Page Cookies: Cookies set for visitors to blog pages.

- A cookie is set to determine the validity CAPTCHA challenge response on an individual blog post page (also known as a permalink page).
- Third-party cookies are used by Google Analytics to associate individual page views with the same site visitor; otherwise, aggregate statistics like bounce rates and visit durations could not be computed.
- Cookies are used to track user consumption of content published using Content Marketing as a part of the Analytics package offered within the application.

  Two cookies are used to track visitors:

- **_sp_id..xxxx**
- **_sp_ses..xxxx**

_sp_id..xxxx - Is used to track a user's interaction with your content. This cookie will have a UUID that is unique to your domain.

_sp_ses..xxxx - Is used to track the session of the visitor

1.3 Creating content types

As an administrator you can create new content types to help structure and organize user-created posts.

To create a new content type:

1. Navigate to **Settings** > **Content Types**, then click **New Content Type** in the upper right-hand corner.
2. Enter a name in the *Content Type Name* field.
3. Select a *Primary Editor* for the content type, the following is a list of the editors and their available options:
   - **Rich Text Editor**: The all-encompassing content editor.
     - Show Content Score - If selected, this will show the content score in the right column.
     - Show Related Content - If selected, this will show the related content in the right column.
   - **Image Upload**: Allows you to upload an image as the focus of the post.
     - Show Text Description Field - If checked, this will show the text description field.
   - **File Upload**: Allows you to upload a file as the focus of the post. A preview of the file is displayed once it is uploaded to Content Marketing. Authors can replace uploaded files

or download files from content assets within Content Marketing.

  - Show Text Description Field - If checked, this will show the text description field.

> **Note**: All files uploaded to Content Marketing are publicly accessible on the Content Delivery Network. Attachments uploaded using the interface are limited to 25MB, however, there are no file size limitations when pushing attachments into Content Marketing through the API.

- **Video**: Allows you to insert a video using standard embed codes, such as an iframe embed code, from an external source like YouTube, Vimeo, or from a Video Cloud platform. View Apps for supported Video Cloud platforms in Content Marketing.
  - Show Text Description Field - If checked, this will show the text description field.
- **Plain Text Editor**: This is a blank, plain-text HTML editor.
  - Show Content Score - If checked, this will show the content score in the right column.
  - Show Related Content - If checked, this will show the related content in the right column.

4. Select *Make all Content a Landing Page* if you want the content to serve as a landing page instead of a text post. Landing Pages will not appear in blog listings. Fixed Landing Pages can be set with the publisher settings. View Adding an Oracle Content Marketing CMS publisher for more information.
5. Click  to select an icon that will be associated with the content type. This is purely aesthetic.
6. Specify whether or not this Content Type should be applicable to **All Business Units** or **Specific Business Units Only**.

> **Note**: This option is only available in multi Business Unit licenses.

7. Click **Save Type** to save your content type.

> **Note:** Once Content Types have been added and saved, users can set the order of how the types will display within the user interface. For example, content types display on the dashboard and when a contributor selects which type to use when creating new content. Click and drag a particular type to a different location within the list to define the desired order.

1.4 Supported browsers for Oracle Content Marketing

The Oracle Content Marketing Application is supported in the following browsers:

- Firefox
- Internet Explorer 11
- Chrome
- Safari

However, when blog template modifications occur, they are checked for compatibility in:

- Firefox
- Internet Explorer 11
- Chrome
- Safari

2 Settings

The Settings page contains the areas needed for general setup of Content Marketing, including license setup, content planning, and content configuration.

Configure License

- Calendar
- Users
- Rights and Roles
- Business Units
- Single Sign On

Configure Content

- Best Practices
- Categories
- Content Languages
- Content Types
- Custom Fields
- Keyword Suggestions
- Content Taxonomies

Configure Publishing & Distribution

- Publishers
- Redirects

Configure Apps

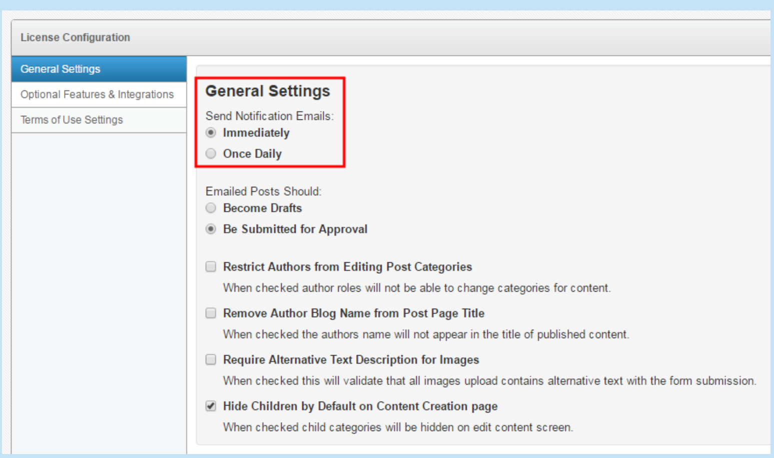
- App Configuration

2.1 General License Configuration

2.1.1 Overview

The License Configuration area enables administrators to enable various settings and features for all users within the Content Marketing instance that best support their specific usage of the platform. To access the License Configuration page, navigate to **Settings > General**.

Example: Depending on how quickly you would like users to respond to events in the production process, you can control the volume of notification emails that are sent from the system for all users.



There are several options available to customize for your license. Depending on your use case, you may only need to review some of the configuration options. Here is a helpful guide on which options you may like to review when configuring your license.

2.1.2 General Settings

Review *all* of these options.

- Configuring the frequency of notification emails
- Enabling a Terms Of Use Agreement

Review the following use cases to determine the options applicable to your license.

If using Content Marketing to publish a Content Hub or Blog, review the following settings:

- Restricting authors from editing post categories
- Removing author blog names from post page title
- Setting a default photo for authors

If curating contributions from employees and a marketing team that may not be users within the tool, review the following settings:

- Configuring Email-to-Post network settings
- Customizing the StoryCapture email header

If working at the Enterprise governance level over content creation and distribution, review the following settings:

- Requiring alt text for all images
- Setting a default image for social sharing

2.1.3 Optional Features & Integrations

Expiring content assets

Logging in as another user (proxy)

Customizing the StoryCapture email header

Making a piece of content 'sticky'

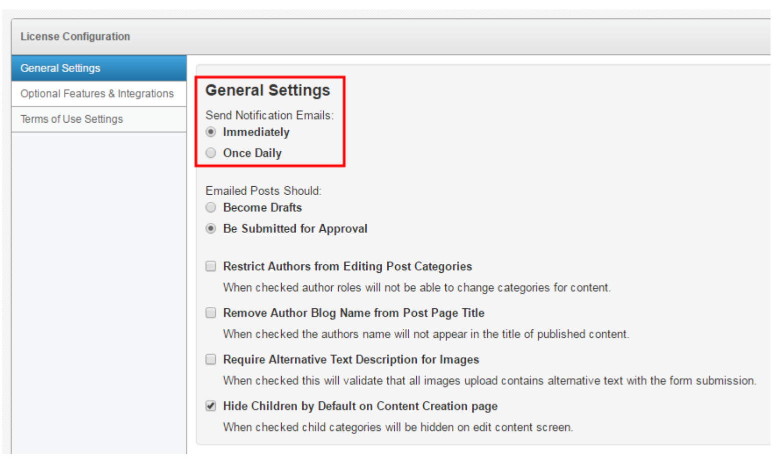
Integrate

2.1.4 Configuring the frequency of notification emails

Depending on how quickly you would like users to respond to events in the production process, you can control the volume of notification emails that are sent from the system for all users.

To set the frequency of notification emails:

1. Navigate to **Settings** > **General**.
2. Under *Send Notification Emails*, select how often notification emails should be sent.



   - **Immediately**: Notification emails are sent immediately after a change.
   - **Once Daily**: Notification emails are sent daily.

3. Click **Save**.

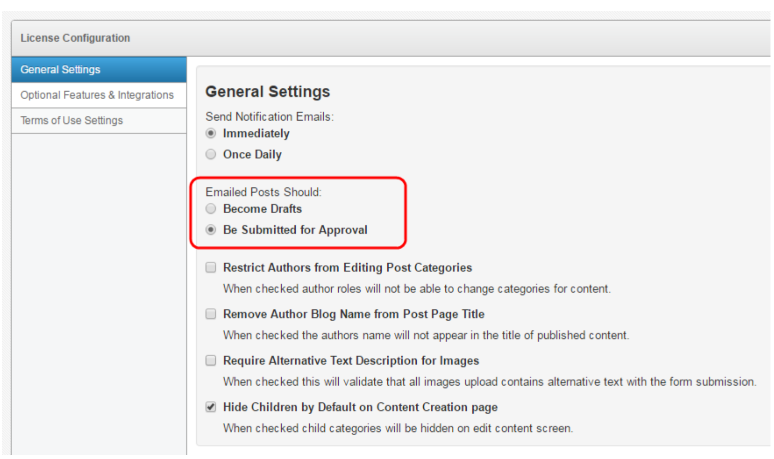
2.1.5 Configuring Email-to-Post network settings

As an Administrator, you have the ability to change your network's Email-to-Post settings. When Authors send emails to their Oracle Content Marketing Email-to-Post email address (@compend.me), the asset can go to one of two places. It can be sent to the Author's account as a draft, or it can be sent immediately to the Administrator account for approval. If the asset appears as a draft in the User's account, the Author will have to submit the asset before it will appear in the Administrator account as a pending asset.

> **Note**: The default setting for Email-to-Post is for assets to appear in the Author's account as drafts.

To change the Network settings for Email-to-Post:

1. Navigate to **Settings** > **General**.
2. In the *General Settings* section, select one of the two options under *Emailed Posts Should*:



- **Become Drafts**: The asset appears as a draft in the Author's account.
- **Be Submitted for Approval**: The asset is automatically submitted to the Administrator for approval.

3. Click **Save** at the bottom of the page when you are done.

2.1.6 Restricting authors from editing post categories

As an Administrator, you have the ability to hide the manual category checkboxes from Authors. Hiding the manual categories restricts authors from editing post categories and allows only the Administrator to be able to designate posts to appear on these pages.

> **Note**: Authors have the ability to designate manual categories for posts by default.

To hide categories from authors:

1. Navigate to **Settings** > **General**.
2. Click **General Settings**.
3. Select the check box next to *Restrict Authors from Editing Post Categories*.
4. Click **Save** at the bottom of the page to save your settings.

2.1.7 Removing author blog names from post page title

You have the ability to remove the author's blog title from the author's content asset `<title>` tag.

To change the title tag settings:

1. Navigate to **Settings** > **General**.

2. Select the check box next to *Remove Author Blog Name from Post Page Title*. The syntax of each content asset's title tag will now be as follows:

   [post title] | (pipe) [blog network name]

2.1.8 Requiring alt text for all images

As an Administrator, you have the ability to require that *alt text* be used for all images that are uploaded into posts across your license. Alternative (alt) text is descriptive text associated with an image that will display if the image does not load. Including alt text also allows search engines to 'see' the contents of the image.

> **Note**: Authors always have the option to add alt text, regardless of the network setting. By default, including alt text is not required.

To make alt text for images a requirement:

1. Navigate to **Settings** > **General**.

2. Click **General Settings**.

3. Select the check box next to *Require Alternative Text Descriptions for Images*.

4. Click **Save** at the bottom of the page.

2.1.9 Setting a default photo for authors

As an Administrator, you can configure the Gravatar preferences for your license. Gravatars are universally recognized avatars, or small images that appear next to your name on various websites. Oracle Content Marketing utilizes Gravatars to display Author's pictures next to their name in an Author list on the blog. You can set a default image to display for an Author in the case that the author has not set their own Gravatar.

To set the default photo for authors:

1. Navigate to **Settings** > **General**.
2. Click **General Settings**.
3. Under the *Default Author Photo* section, either upload an image from your computer or enter a URL to link to an image that is hosted online.
4. Click **Save** at the bottom of the page to save the default image.

2.1.10 Setting a default image for social sharing

As an Administrator, you have the ability to set a default image to appear with social shares of posts that do not contain images. If a post contains images, the first image will be pulled to display with the social share.

> **Note**: Not all social media sites utilize OpenGraph; Facebook and LinkedIn are two that do.

To add a default OpenGraph image:

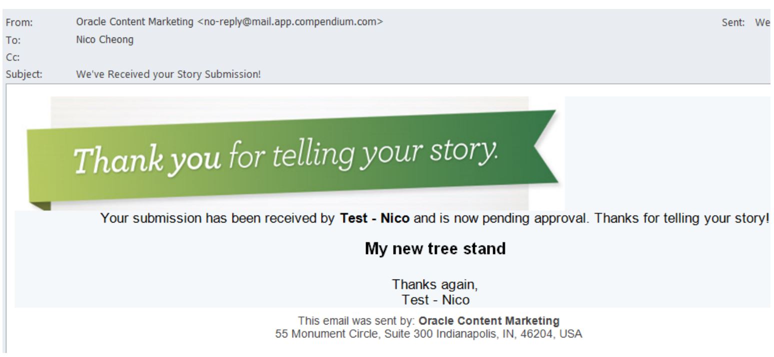
1. Navigate to **Settings** > **General**.
2. Click **General Settings**.

3. Under the *Default OpenGraph Image* section, provide the image URL or upload an image from your files. A preview will appear on the left.
4. Click **Save**.

Note: The file you provide is not resized. The image will be displayed within the 100x100px box for the preview, which mimics what Facebook and LinkedIn will do.

2.1.11 Customizing the StoryCapture email header

When users submit your StoryCapture form, an email is sent to them thanking them for their submission.



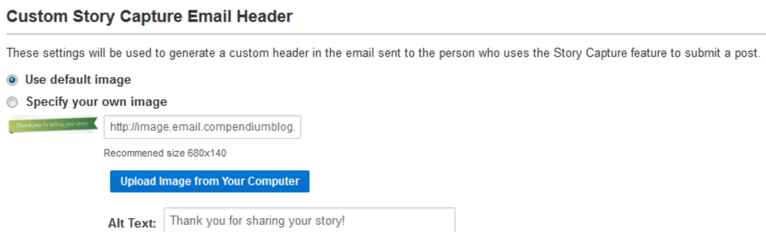
You can customize this email's header.

Note: This feature must be enabled by an Administrator in the License Configuration menu.

To customize the StoryCapture email header:

1. Navigate to **Settings** > **General Settings**.

2. In the **Custom StoryCapture Email Header** section, complete the settings as necessary:



- **Use default image**: Select to use the default image as the email header.
- **Specify your own image**: Select to use a custom image as the email header.
- **Upload Image from Your Computer**: Click to upload an image.
- **Alt Text**: Enter alternative text for the email header image.

3. Click **Save**.

All changes to the StoryCapture response email were saved.

2.1.12 Enabling a Terms Of Use Agreement

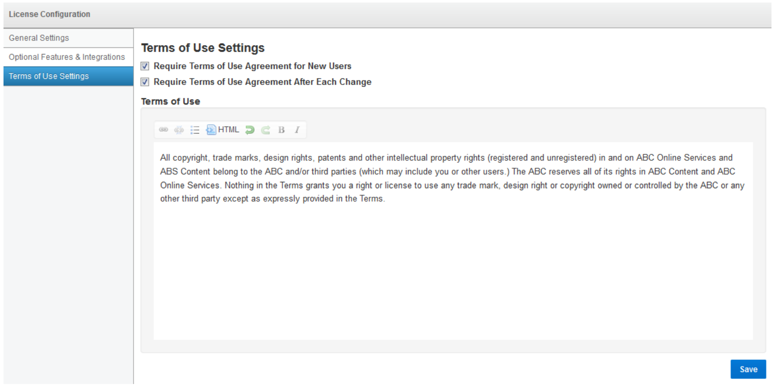
Administrators can configure licenses so that users must agree to a Terms of Use Agreement upon logging in for the first time. Optionally, you can also require users to agree to a Terms of Use Agreement when making changes within the application.

To enable and configure your Terms of Use Agreement:

1. Navigate to **Settings** > **General**.

2. Click **Terms of Use Settings**.

3. Select the options as applicable:



- **Require Terms of Use Agreement for New Users**: Select the check box to prompt every new user to your license with a Terms of Use Agreement.
- **Require Terms of Use Agreement After Each Change**: Select the check box to prompt a Terms of Use Agreement to users after users make a change.
- **Terms of Use**: Enter your Terms of Use Agreement into the text box.

4. Click **Save**.

Your Terms of Use settings are updated.

2.2 Users

Administrators can add users to their Oracle Content Marketing account, these users can then be assigned different roles within the application. Once a user is added they can setup their account, and edit their account details and settings as needed.

Learn more by watching the video

Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

2.2.1 Initial setup of author accounts

As an Author, you will receive an email when your Author account is set up. The email contains the username and password for your account. Before you are able to start writing content, you have to go through the account set up process.

To set up your author account:

1. Navigate to www.compendium.com/, then click **Log In** and enter your author credentials, you are greeted with a pop-up window welcoming you and explaining the 5P's of content marketing. Click **Get Started**.

   Note: Your login credentials are emailed to you when an administrator invites you to join.

2. Select a region and a time zone from the drop-down list to set your account time zone.

3. Change your password: Enter your current password by manually typing it to avoid a login error that can occur when you copy and paste. Enter the password you would like to use in the *New Password* and *Confirm Password* fields, then click **Continue**.

Note: If you are using Internet Explorer, you may be prompted with a security warning. Be sure to select 'No' so that you can view all information and form fields.

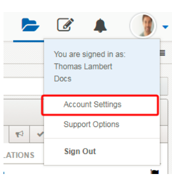
4. Enter a Bio & Photo if wanted, then click **Continue**.
5. In the *Basic Info* section, enter your name, job title, department, and phone. You can also add your personal contact information, then click **Continue**.
6. In the *Linked Accounts* section, add the social accounts that you would like to use to promote your content, then click **Continue**. You are now ready to create content.

2.2.2 Editing account settings

Within your account settings, you can modify your name, email address, time zone, password, blog title, blog description, and other general options for your account.

To edit account settings:

1. Navigate to **Account Settings**.



2. Edit the information in each tab as needed.
   - **General**: Contains your general personal information, i.e. Username, First Name, Last Name, Email Address, Timezone, Job Title, Department, Phone.
   - **Bio & Photo**: This section is similar to our previously known, 'Sticky Post'; however, contrary to the sticky post, your bio information can be included anywhere with your blog's template.

Essentially, we have more flexibility where this information is included and it's not confined as the top post of your author blog/page.

- **Social Info**: Provides a space to add your personal contact information, i.e. Website, Facebook URL, Twitter Handle, LinkedIn URL, Google+ URL.
- **Blog Settings**: Controls your blog settings. You can edit your blog title and description here.
- **Email to Post**: Manage your Email to Post Address.
- **Notification Settings**: Configure your account's notification settings.
  - **Notify Me On All Content Expiration**: Determines whether or not to receive notifications when content expires.
- **Calendar Settings**: Download calendars to import them into your personal calendar system (iCal, Google Calendar, and so on).
- **Password & API Key**: Change your password and find API access information (used to make calls to the API).

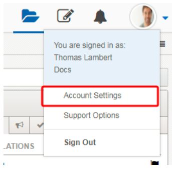
2.2.3 Updating the URL and title of your blog

As an Author, you are unable to change the URL for your Author page once it has been set, you can however edit the title that appears at the top of your blog.

Note: The maximum character length for the blog title is 50 characters.

To update a blog title:

1. Navigate to **Account Settings**.



2. Click **Blog Settings**.
3. Edit the title as needed, then click **Save**.

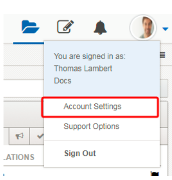
2.2.4 Changing user timezone settings

As a user, you are required to set your timezone when you log into your account for the first time. If you would like to change the timezone at any point, you can do so by following the steps below.

> **Note**: It is very important to set the correct timezone because you have the ability to set a publish date and time for posts.

To change the time zone setting for a user account:

1. Navigate to **Account Settings**.



2. Click **General**, then select the correct timezone from the corresponding drop-down menu.

💡 **Note**: Choose the timezone of the nearest major city within your timezone.

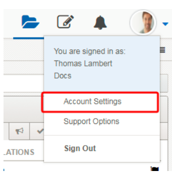
3. Click **Save** to save your new timezone setting.

2.2.5 Changing account passwords

As an Author, you have the ability to change your password within the *Account Settings* tab.

To change your account password:

1. Navigate to **Account Settings**.



2. Click **Password & API Key**
3. Enter the Current Password, New Password, and Confirm Password fields, then click **Change Password**, a message displays confirming the password change.

2.2.6 Resetting forgotten passwords

As an Author, you have the option of having your password reset if you forget it over time.

To reset a forgotten password:

1. Go to https://app.compendium.com/.
2. Beneath the *Password* field, click the *Forgot Password?* link.
3. Enter your Content Marketing username, and the email address that is associated with your account, then click **Reset Password**. A message displays confirming that your password has been reset, an email is sent to you containing a temporary password.
4. Login with the password from the email. Once you have gained access to the application, the temporary password can be changed in the Account Settings area of the application. Learn more about changing your password.

Note: You may need to manually type your password into the form field. Copy and pasting from the email can result in an error due to additional formatting being copied from the email document.

2.2.7 Managing user accounts

As an Administrator, you are responsible for managing your network's users, this can be done from the *Manage Users* interface.

To access the *Manage Users* interface:

1. Navigate to **Settings** > **Users**, the *Manage Users* page opens listing all of the users within the instance.
2. Within the **Manage Users** interface, you can perform the following operations:
   - Add users
   - Filter user accounts to narrow down the results
   - Manage user accounts in bulk

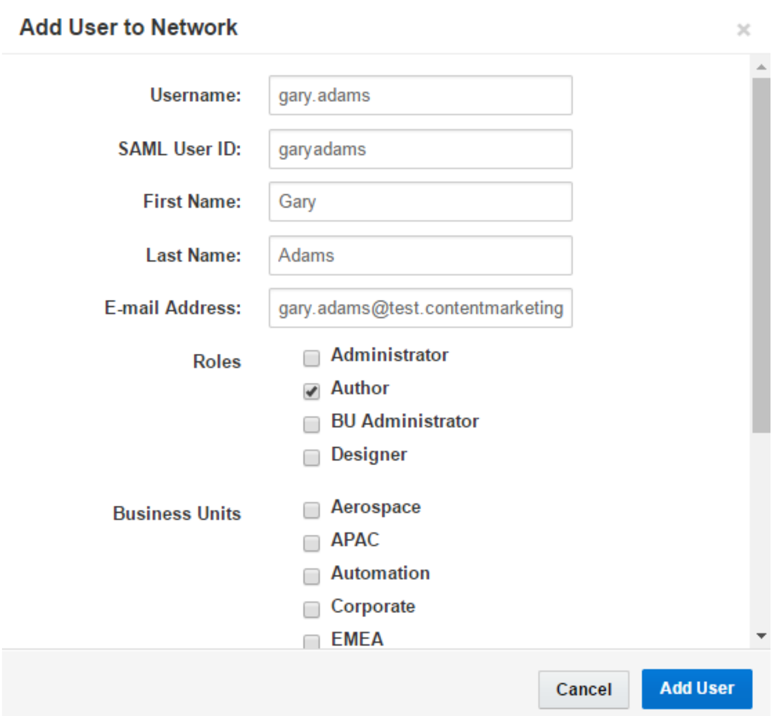
- Manage user accounts individually such as:
  - Edit a user's information
  - Reset a user's password
  - Disable a user's account
  - Copy a user's Email-to-Post address
  - Set default categories
  - Proxy into a user's account

Adding users

As an Administrator, you are responsible for adding Authors to your Oracle Content Marketing blog network.

To add users:

1. Login to the Oracle Content Marketing application with your Administrator credentials.
2. Navigate to **Settings** > **Users**, then click **Add User**, the *Add User to Network* dialog opens.
3. Complete the fields as appropriate.



- **Username**: Enter a unique username.
- **SAML User ID**: Enter the user's SAML user ID. The **Manage SSO** right is required to configure single sign on.
- **First Name**: Enter the user's first name.
- **Last Name**: Enter the user's last name.
- **Email Address**: Enter the user's email address.
- **Roles**: Select the roles the user will inherit.
- **Business Units**: Select the Business Units this user will have access to.

> **Note**: This option is only available in multi Business Unit licenses.

- **Author Page Title**: Enter a page title for the author's page URL. A preview of the *Author's Page URL* is shown below.

4. Click **Add User** when you are done, the user is sent a welcome email.

Filtering user accounts

You can filter the **Manage Users** interface to see specific user accounts according to various criteria:

- User accounts that are active or disabled.
- User accounts that may or may not be assigned to specified roles.
- User accounts that may or may not be assigned to specific Business Units.

To filter user accounts:

1. Navigate to **Settings** > **Users**.
2. Click **Filter**.
3. Select a filter option. You can filter for user accounts that are **Assigned** or **Not Assigned** to any one of your Roles or Business Units.

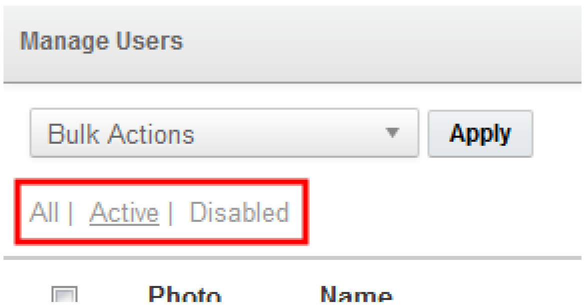
   General Options

   - **Roles**: Click the drop-down list to select the roles to include in the filter.
   - **Business Units**: Click the drop-down list to select the Business Units to include in the filter.

4. Manage user accounts. Some of the available actions are:
   - Perform actions to user accounts in bulk
   - Edit the user's information
   - Reset the user's password
   - Disable the user's account

- Copy the user's Email-to-Post address
- Proxy into the user's account

5. To filter user account statuses to see which accounts are active or disabled, click **Active** or **Disabled** respectively.



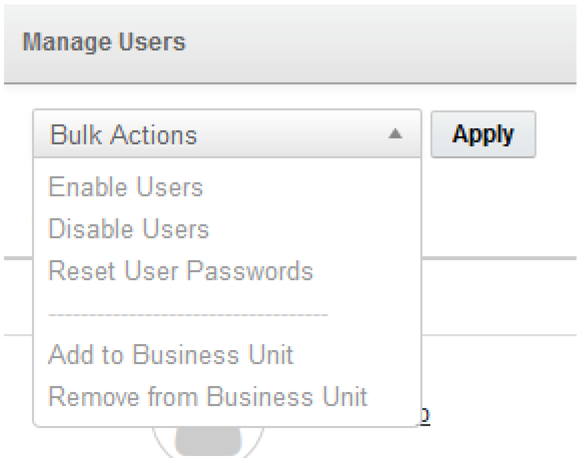
Managing user accounts in bulk

You can perform actions in bulk to multiple user accounts. You can enable or disable multiple user accounts at once as well as reset user passwords. Additionally, you can add or remove users from Business Units.

> **Note**: You cannot perform bulk actions to your own user account.

To perform actions to user accounts in bulk:

1. Select the user accounts you want to modify by clicking the check box next to the user account.
2. Click the **Bulk Actions** drop-down list.



3. Select a bulk action to perform:

   - **Enable Users**: Activates the selected user accounts.
   - **Disable Users**: Disables the selected user accounts. Their posts will remain on the live blog, but they will not be able to log in to their account to create new posts. For more information see Disabling author accounts.
   - **Reset User Passwords**: Resets the passwords for the selected user accounts. You can use this ability if the authors have forgotten their passwords, or if a new password needs to be generated for security reasons. Once you reset the password, the authors will receive an email with the new login credentials.
   - **Add to Business Unit**: Assigns the selected users to the selected Business Unit(s).
   - **Remove from Business Unit**: Removes the selected users from the selected Business Unit(s).

4. Click **Apply**.

Resetting user passwords

As an Administrator, you have the ability to reset an Author's password. You can use this ability if the Author has forgotten their password, or if a new password needs to be generated for security reasons. Once you reset the password, the Author will receive an email with the new login credentials.

To reset an Author's password:

1. Navigate to **Settings** > **Users**.
2. Locate the Author for whom you would like to reset a password, then click the *Reset password* icon ( ), to the right of the user's name.
3. Click **OK** in the confirmation box that opens to confirm that you want to reset the password.

> **Tip**: You can also reset user passwords in bulk.

Disabling author accounts

As an Administrator, you have the ability to disable an Author account if an employee is no longer an active blogger. Their posts will remain on the live blog, but they will not be able to log in to their account to create new posts.

To disable an author account:

1. Navigate to **Settings** > **Users**.
2. Locate the Author that you would like to disable, then click the *Disable User* icon ( ) to the right of the name. The user account is disabled and will no longer appear on the list unless you click **Show Disabled Users**. The user can be enabled again by clicking the *Enable User* icon ( ).

Tip: You can also disable author accounts in bulk.

Editing author information

As an Administrator, you have the ability to edit a user's first name, last name, and email address. However, an Administrator does not have the ability to edit a user's blog title or username.

Note: Oracle Content Marketing does NOT delete Author accounts, and Administrators do not have this privilege. Standard practice is to mark accounts as inactive so their content remains on the blog but they cannot access their account. The Administrator could also change the Author's information (including first name, last name, and email address) and then reset their password.

To edit an author's information:

1. Navigate to **Settings** > **Users**.
2. Locate the Author whose account you want to edit using the search field at the top of the page.
3. Click the *Edit this user* icon (pencil icon) next to the Author's name, the *Edit User* window opens.
4. Modify the Author's information as needed, then click **Save** to save your changes.

Logging in as another user (proxy)

The *User Proxy* feature allows administrators to login to the application as one of the users in their network.

> **Note**: This feature must be enabled by an Administrator in the License Configuration menu.

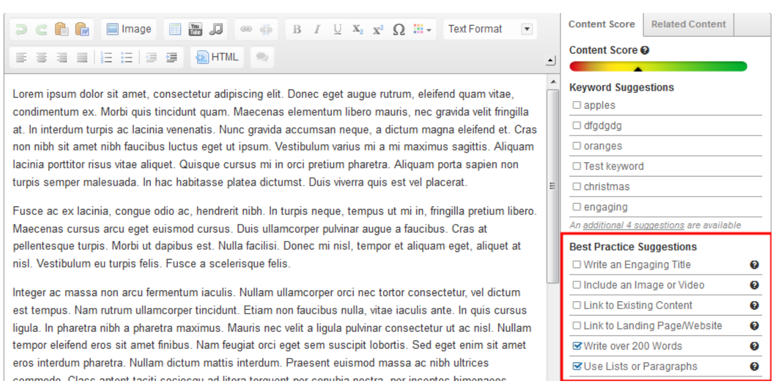
To log into the application as another user:

1. Navigate to **Settings** > **Users**.
2. Click the  *Proxy Login* icon next to the Author's name, you can now navigate the application as the selected user.

2.2.8 Best Practices

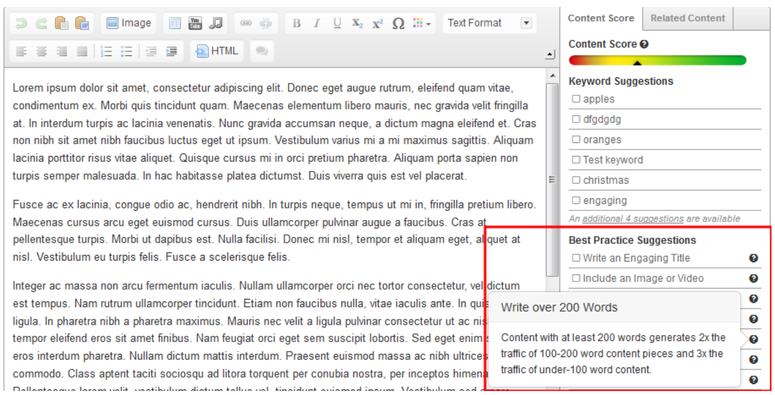
Best Practice suggestions are guidelines authors can follow to improve content creation.

Create Best Practices to remind authors to follow content creation guidelines. Best Practices suggestions are displayed when authoring content.



Adding Best Practice suggestions

Add Best Practice suggestions to suggest content authoring guidelines for authors to follow. Best Practice suggestions can be used in a variety of applications, from best practice style guidelines, to organizational guidelines (brand, legal, regulatory) that are required guidance for authoring content. The titles for each of the Best Practice suggestions are displayed in the Content Score panel, the author can hover each suggestion to view more information.



To add a Best Practice:

1. Navigate to **Settings** > **Best Practices**.
2. Click **New Best Practice**.
3. Complete the fields as appropriate.
   - **Suggestion Title**

     Enter a title for the best practice suggestion.
   - **Description**

     Enter a description for the best practice suggestion.

- **Business Units**
  - **All Business Units**

    Select to allow all Business Units to access this Best Practice.
  - **Specific Business Units Only**

    Select to limit this Best Practice to specific Business Units. Select the Business Units this Best Practice will be applicable to.

  Note: This option is only available in multi Business Unit licenses.

4. Click **Save Best Practice**.

The Best Practice was added.

2.3 Rights and Roles

Oracle Content Marketing's User Rights and Roles functionality allows customers to define responsibilities for administrators, content creators, editors, technical admins, and marketing team members within an organization and across Business Units.

Note: Roles are shared across all Business Units. Roles are not Business Unit specific.

Every license comes pre-configured with a default set of roles (Administrator, Author, Designer, and so on) to provide an example setup of common roles within a marketing team. See Understanding default roles to learn more about the permissions each role grants. You can also create custom roles to match your unique requirements and assign multiple roles to each user.

Example: You have a marketing team member that needs to have access to edit your Content Hub templates. This team member would be assigned the Designer role. You would also need to create a role just for managing publishers. In addition to their technical role, you would give the marketer their role of Content Marketer plus Content Hub Admin.

Each role has a customizable set of rights that can be granted or removed at any time.

For customers who are using Content Marketing's publishing capabilities, access to content can also be restricted on a per-category basis, providing very fine-tuned control over who can view and edit content.

Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

2.3.1 Understanding default roles

Every license comes with a select set of roles out-of-the-box (Administrator, Author, Designer, and so on). An overview of each of these roles and the default access is provided below. You will also want to create new custom roles that match your organization's requirements for how your users will operate within the system.

Administrators

As an *Administrator*, you have full permissions to all functionality within Content

Marketing. Administrators are generally responsible for setting up and configuring Content Marketing for a team. Some common tasks for administrators include:

- Creating custom roles
- Creating workflows
- Creating custom fields
- Configuring publishers

If you are new to Content Marketing, see Getting Started to learn how administrators can start leveraging the Content Marketing solution for your needs.

Authors

As an *Author*, you are an individual content contributor whose primary responsibility is the creation of content.

Authors have the ability to:

- Create content
- Modify their own content
- View comments submitted on their content
- Promote content through social networks

Each content hub can be built to display published content in different locations. If you are using the default configuration of Content Marketing to publish a content hub, an author's content will appear on the main page, and if the post has been tagged to a category the post will appear on the respective category pages network's categories. All approved content applicable to an *Author* will appear on the individual Author blog, which is specific to the individual content contributor.

Designers

The Designer role should be assigned to any users within your organization that will be managing the design of any Content Hubs hosted with Content Marketing. Users with the designer role will get access to administer all aspects of your Content Hub templates, including the ability to customize the look and feel of your design.

For minor tweaks to the template for an existing content hub, the Oracle Content Marketing support team can provide assistance.

Business Unit Administrators

As a *Business Unit administrator*, you are responsible for managing Business Units. The right for administering Business Units is only displayed for this role. No other roles will display this right. See Managing user rights for more information.

Business Unit administrators have the ability to:

- Add, modify, and delete Business Units

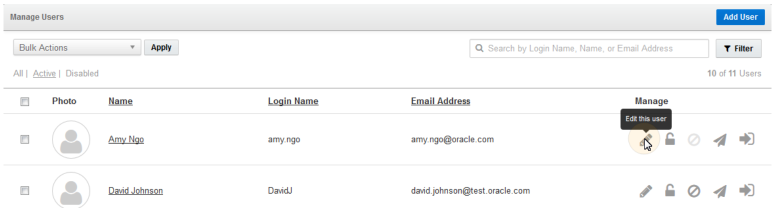
Note: This option is only available in multi Business Unit licenses.

2.3.2 Assigning roles

After creating custom roles, you'll want to assign these roles to users.

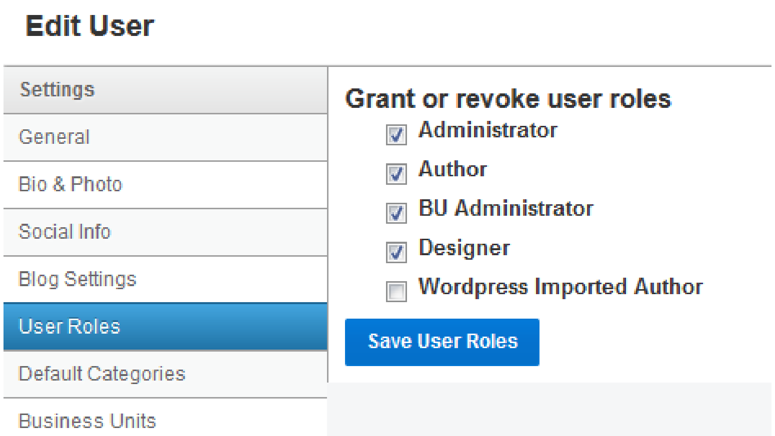
To assign a role:

1. Navigate to **Settings** > **Users**.
2. Find the user for whom you want to assign a role and click **Edit this user**.



3. In the list of Settings on the left, click **User Roles**.

4. Select the role(s) for the user.



5. Click **Save User Roles**.

2.3.3 Creating custom roles

You will want to create your own custom roles that meet your organization's requirements based on how your users will operate within the system.

To create a role:

1. Navigate to **Settings** > **Rights & Roles**.

2. Click **Add Role**.

3. Enter a name for the role.

4. Select the rights and permissions for the role. See Managing user rights for more information on each permission.

5. Click **Save Role**.

The custom role was added. Next, you will want to assign the role to users.

2.3.4 Managing user rights

Each role in Content Marketing is comprised of a customizable set of rights and permissions. The following tables describe what capabilities users will be given, by area of the application, by selecting that option on the **Manage User Roles** screen. Administrators have the ability to modify the default roles, or create custom roles.

Planning

Right	Description
Manage Personas	Add, modify, and delete Personas
Manage Topic Modeling	Manage the Topics & Idea Planning functionality
Edit Topics	Add, edit, delete, and assign Topics to users
Edit Ideas	Enables the ability to add, edit, and delete Ideas. Users can also categorize Ideas into topics, assign Ideas to authors, and create content from Ideas.
Manage Assignments	Manage content assignments to users
Manage Workflow	Manage Workflows

Collaboration

Right	Description
Promote Own Content	Users will be able to promote their own content, the promotion UI will display within the content library containing any options that have been configured. Users also gain access to the Linked Accounts management screen, to configure their own accounts to use for promotions.
Promote All Content	Users will be able to promote all content within a license, the promotion UI will display within the content

Right	Description
	library containing any options that have been configured. Users also gain access to the Linked Accounts management screen, to configure their own accounts to use for promotions.
Manage Projects	Create, edit, and delete Projects
All Content	View, edit, or delete all content within the license
User's Content	Allows a user to create, view, edit, or delete their own content or publish without moderation. You may also set "Category-Specific Rules" that would allow a user (or limit a user) to view, edit, or delete content associated with that category. The rights defined to manage content will make other parts of the application / actions available to the user. For example, a user with rights restricted to **User's Content > Create Content** will also have access to view the editorial calendar, populated just with their content.
Workflow Permissions	• **Edit Assigned Content** View or edit assigned content for which they do not have view or edit rights. Should almost always be enabled. • **Manage e-Signature Tasks** Add, update, and remove e-Signature tasks on content, even when a task is assigned to another user. • **Manage Asset Workflows** Activate and remove *optional workflows* on specific content assets. Does not include the ability to remove required workflows.

Right	Description
	• **Manage Notify & Basic Tasks** Add, remove, and complete notifications and basic tasks on specific content assets, even when a task is assigned to another user. Users can always complete tasks that are assigned to them. This permission is normally granted to all users. • **Remove Required Asset Workflows** Remove required workflows on specific content assets. Normally granted only to administrators. • **Manage Approval Tasks** Add, remove, and complete approval tasks on specific content assets, even when a task is assigned to another user. Users can always complete tasks that are assigned to them. Normally granted only to administrators. • **Content Edits Don't Affect Workflow** Content edits will be saved to the content history, but will not affect workflow in any way. Changes made to approved content will be immediately approved and if applicable, immediately published. Normally only granted to administrators, and even then, only rarely.

Distribution

Right	Description
Manage Content Portals	Manage Content Portals
Manage Own Content Groups	Allows a user to create and manage their own content groups
Manage All Content Groups	Allows a user to create and manage all content groups on a network (those created by other users

Blog Management

Right	Description
Manage Calls-to-Action	Manage calls-to-action on a Content Hub template via our Widget Editor
Manage Hub Design	Access the Oracle Content Marketing template engine and therefore control the overall design of all Content Hubs
Unpublish Content	Take down approved content and set expiration dates on content assets
Manage Comments	Approve and decline all comments in your license
View Own Comments	Allows a user to manage their own comments

Analytics

Right	Description
View & Export Own Analytics	Allows a user to see analytics related to their content only and export their analytics data
View & Export All Analytics	Allows a user to see all analytics for all users on a network and export data for all users in a license

Settings

Right	Description
Manage General Settings	• Manage user Account Settings • Create, edit, and delete Custom Fields
Manage Calendar Events	Manage calendar events and add, remove, and modify campaigns on the Editorial Calendar
Manage Calendar Settings	Create, edit, and delete Custom Calendar Entry Types and modify Calendar Sharing Settings
Manage Calendar View Access	Enables the user to create and share Calendar Views with other users in the license. Users with this right can also manage the default view settings for all users.
Manage Users and Roles	• Create, edit, and delete Rights & Roles • Create, edit, and disable Users
Manage SSO	Manage Single Sign On

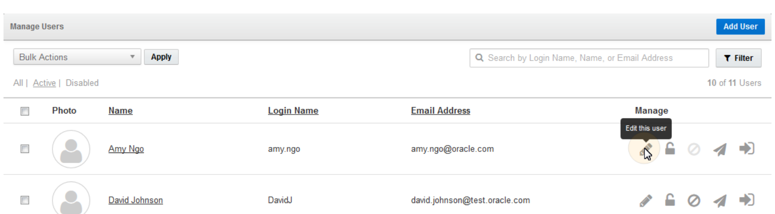
Right	Description
Manage Categories	Add, delete, and adjust Manual Categories
Manage Content Languages	Add, edit, and delete Content Languages
Manage Taxonomies	Add, edit, and delete Taxonomies
Contribute To Taxonomies	Enables users to create new taxonomy items from within the editor at the time an asset is authored
Manage Publishers	Manage Publishers in your license
Manage Landing Pages	Create, edit, or remove landing pages from a Content Hub
Manage Redirects	Allows a user to setup URL redirects for pages on a Content Hub
Manage App Configuration	Manage installed applications
Manage Content Types	Create, edit, and delete Content Types

2.3.5 Assigning roles

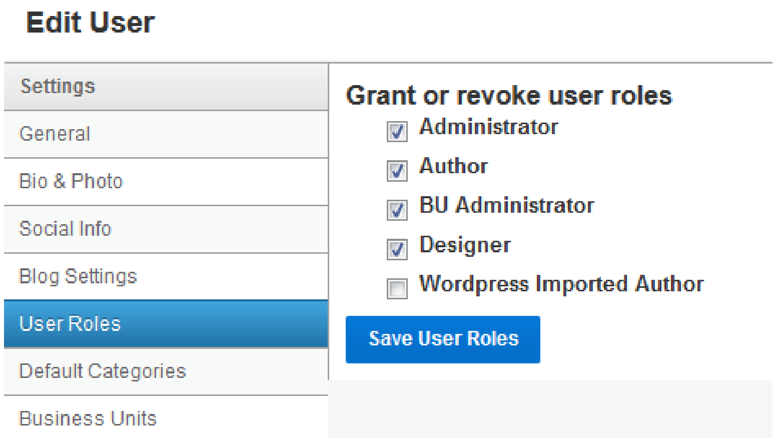
After creating custom roles, you'll want to assign these roles to users.

To assign a role:

1. Navigate to **Settings** > **Users**.
2. Find the user for whom you want to assign a role and click **Edit this user**.



3. In the list of Settings on the left, click **User Roles**.
4. Select the role(s) for the user.



5. Click **Save User Roles**.

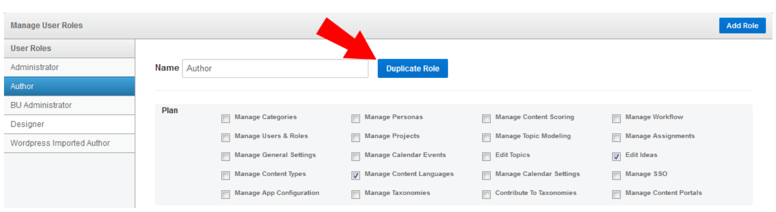
2.3.6 Duplicating roles

Users have the ability to create new roles by duplicating an existing role.

Note: The BU Administrator role cannot be duplicated.

To duplicate a role:

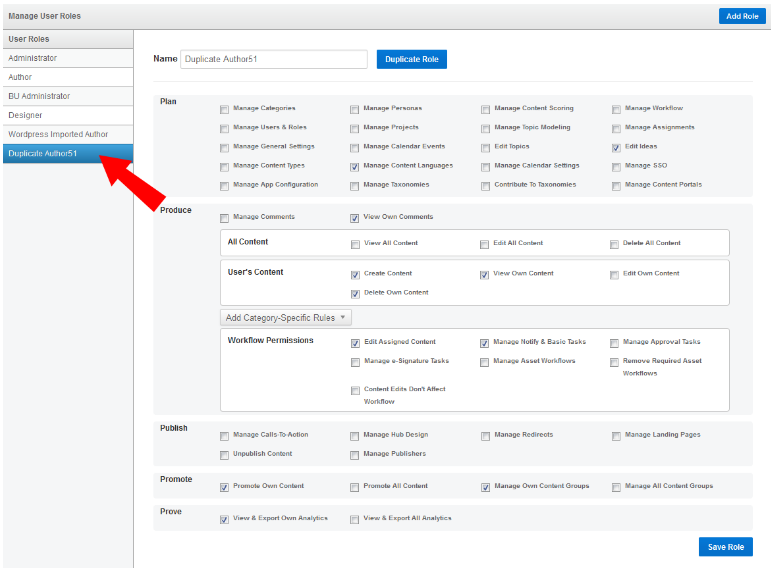
1. Navigate to **Settings** > **Rights and Roles**.
2. Under *Manage User Roles*, select a role to duplicate.



3. Click **Duplicate Role**, and give the duplicated role a name.

4. Review the rights for the duplicated role, adding or removing rights as appropriate.

The newly created duplicate role will appear at the bottom of the list of User Roles.



2.4 Business Units

Business Units functionality within Oracle Content Marketing allows marketers to create consistency in content planning and production across multiple teams, while maintaining separation of content assets, analytics, editorial plans, and other content data between those teams within your license.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

2.4.1 Overview

Business Units allow for an unlimited number of teams, or in an agency setting - agency teams servicing multiple customers, to plan and produce content within Content Marketing. Business Units can be used in a variety of settings, here are a couple of examples of how this functionality is best utilized:

- An organization with multiple business divisions.
- An organization with teams focused on a specific marketing channel.
- An organization with marketing operations in more than one region.
- An organization with teams focused on specific publications.
- An agency or shared services group providing content marketing services to more than one customer.

Business Units functionality was designed to help marketing organizations build one central location to create and distribute content, while addressing the operational challenges faced in designing an environment that fosters effective multi-team collaboration.

While Business Units can support a variety of use cases, these are the two most common use cases and the corresponding benefits for designing a multiple Business Unit environment.

Multiple Business Divisions

- **Visibility of Activity**

  Visibility into all of the content marketing activities currently in motion across teams within an organization.

- **Discovery of Assets**

Afford multiple teams visibility and access to content assets being created in other parts of your organization, reducing redundancy, and increasing efficiency.

- **Consistency of Strategy**

  Define one content marketing strategy, and operationalize key components of that strategy across multiple teams including what audiences to target, what types of content to produce, how content should be organized, and where content should be published.

Agencies

- **Streamline Communications**

  Move communication out of email, Microsoft Excel, project management systems, and other disparate communication tools into one system that is designed to help manage the communication necessary to create marketing content.

- **Collaborate Efficiently**

  Create a collaborative environment that is optimized for your content marketing service offerings, with planning tools that define a consistent set of roles, workflows, and content types for collaboration.

- **Automatically Report Progress**

  Tools including the calendar, projects, and workflow within Content Marketing help agencies communicate the current production status on marketing content both to customers, and to internal agency stakeholders to ensure all teams are informed and proper expectations are set.

> **Note**: The number of available Business Units is different for each license of Content Marketing. The number of Business Units included as standard will be different for each trim of Content Marketing, and additional add-on Business Units

can be purchased as needed. Please contact your Account Representative for up-to-date information on how many Business Units are available for your license of Content Marketing.

The Network administrator is granted the Business Unit Administrator role by default, but can grant this role to another user. To grant a role to another user, see Creating custom roles.

Learn more: For more information, sign up for the Oracle Content Marketing: Business Units course from the Oracle Marketing Cloud Academy.

2.4.2 Multi Business Unit setup

The technical configuration of a Business Unit is a simple process, deciding on how to best configure a license such that multiple teams can collaborate effectively requires some additional considerations.

Configuration overview:

- Adding a Business Unit
- Using the Business Unit toolbar
- Content planning and production components

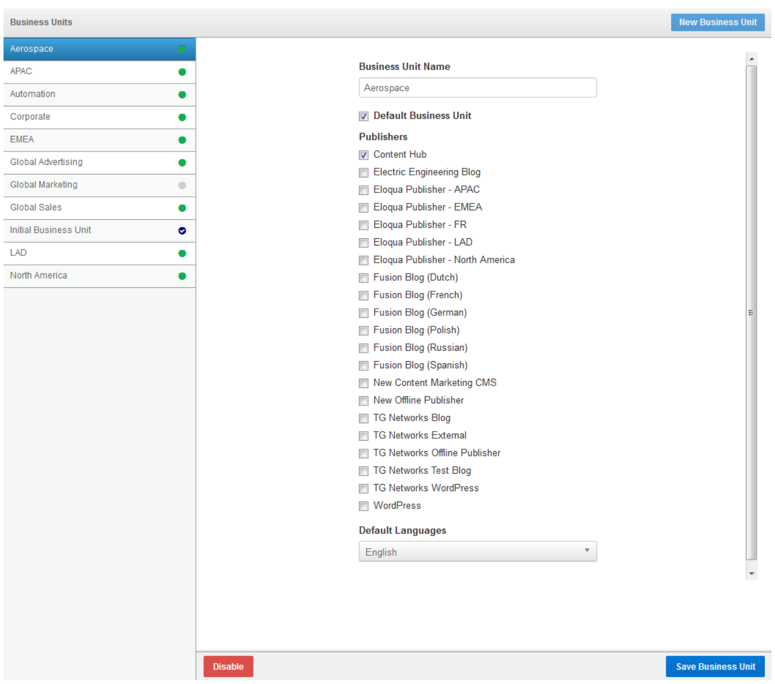
Let's first look at the simple steps for creating Business Units, as well as usage of the Business Units toolbar - which is the functionality that allows users with access to more than one Business Unit to navigate between each Business Unit in the content planning and production process.

2.4.3 Adding a Business Unit

Add Business Units to increase the number of business divisions, or in an agency setting, the number of clients that are able to work within a license of Content Marketing.

Note: Business Units can be disabled, but cannot be deleted.

1. Navigate to **Settings** > **Business Units**.



2. Click **New Business Unit**.

3. Complete the fields as required.

- **Business Unit Name**

  Enter a name for the Business Unit.

- **Publishers**

  Select the Publishers the Business Unit can publish to. For more information on both creating new publishers and configuring a publisher, see Publishers.

- **Default Languages**

  Select which language should be default when users create content within a Business Unit. Languages are used to organize localized content assets, and when defined are shared across a license. See Content Languages for more information on defining languages.

4. Click **Save Business Unit**.

The Business Unit was added.

2.4.4 Using the Business Unit toolbar

Users that have been granted access to more than one Business Unit, will see a toolbar below the main navigation that is referred to as the Business Unit toolbar.

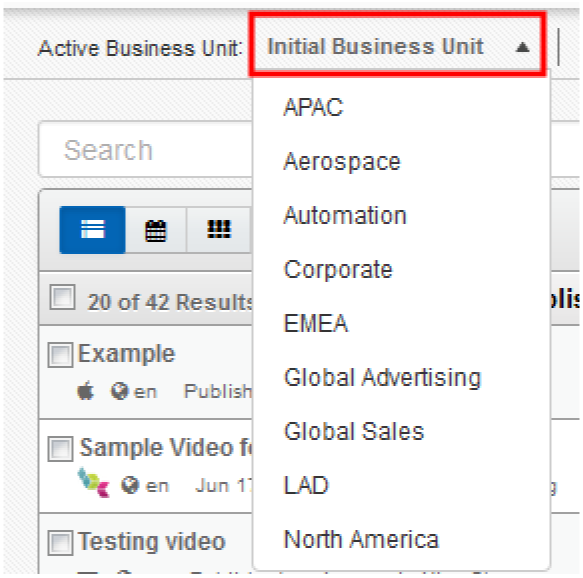
The Business Unit toolbar indicates which Business Unit is the Active Business Unit, which is important to note when creating content data. The toolbar also provides quick access to combine or switch views between Business Units. Use the toolbar to add data from other Business Units to your current view to gain insight on activity from multiple teams.

The configuration set in the Business Unit toolbar will persist for each user's account. For example, when a user sets a specific active business unit and sets Also Viewing to include 3 other business units, that same configuration will display the next time the user accesses the screen. This allows users to set and save a common 'view' of interest within the workspace.

You can modify your view in the following ways:

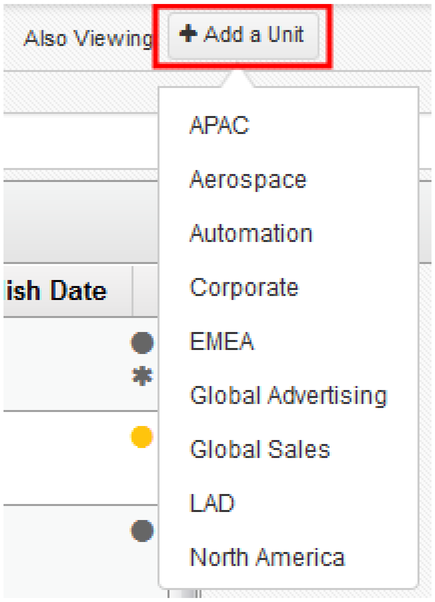
- **Change your active Business Unit view**

  Click the drop-down menu to change the active Business Unit. The active Business Unit is displayed by default.

- **Quickly add Business Units to your view**

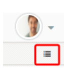
  Click **Add a Unit** and select a Business Unit to add data from that Business Unit into your current view.



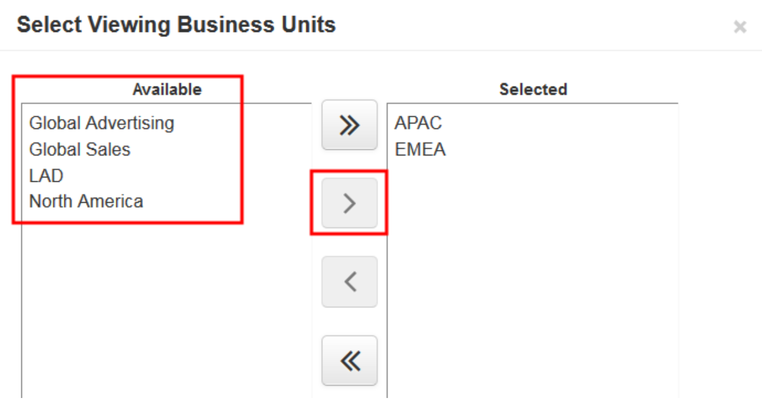
Note: If you change your active Business Unit to a Business Unit that is listed here in "Also Viewing", the previously active Business Unit will automatically move to "Also Viewing".

- **Bulk add Business Units to your view**

  Click the **Select Viewing Business Units** button to bulk add Business Units to your view.

  In the *Select Viewing Business Units* pane, select the Business Units you want to add to the view in the *Available* pane and click the arrows to move them to the *Selected* pane.



2.4.5 Content planning and production components

Now that we understand the basics of creating Business Units, and using the Business Unit toolbar, we will look at which content planning and production tools can be defined once, and shared across Business Units, vs. which tools are unique to each Business Unit.

The table below illustrates which content planning & production components are unique to individual Business Units and which components can be shared across Business Units:

Planning objects that are viewable specifically to individual Business Units	Planning objects that are shareable across Business Units	Planning objects shared by all Business Units
• Calendar items and events • Content groups • Personas • Funnel stages • Topics • Keyword suggestions • Comments	• Projects • Best practices • Categories • Publishers • Content type • Custom entries on the marketing calendar	• Roles • Templates • Linked accounts • Custom fields • Call to actions and banners

Planning objects that are viewable specifically to individual Business Units	Planning objects that are shareable across Business Units	Planning objects shared by all Business Units
• Workflow Tasks	• Workflow stages	

It is important to consider consistent organization and definition of the types of content that your team will produce to ensure consistency in measurement, and make it easy for all teams to discover existing assets that can be repurposed. Alternatively, the makeup, responsibilities and workflows for how a team collaborates will typically be specific to each team, which is why workflows are defined separately for each Business Unit.

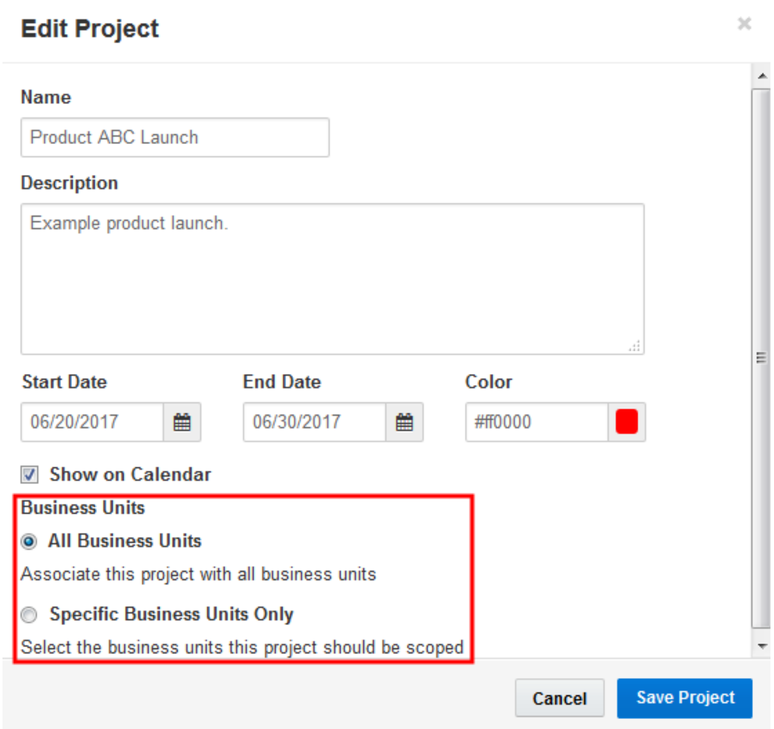
> **Example**: An organization has a manufacturing division and an electronics division. Both divisions are producing similar content for web, email, and social, therefore content types should be defined once and shared across these Business Units. However, the roles involved in the content creation workflow within each division is different. Therefore each Business Unit has the option to define different workflows.

Now that we've explained the importance of content planning and production components, let’s look at how to share components across Business Units, and how to edit components that are unique to a Business Unit.

Sharing components across Business Units

It is easy to share components across Business Units. Components that can be shared will provide two options for sharing: Share across *All Business Units*, or share across *Specific Business Units Only*.

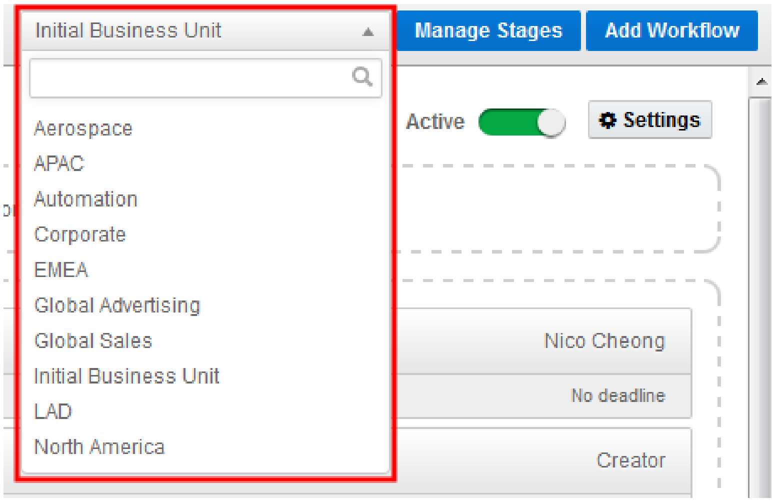
For example, you might want to create a project for an upcoming marketing event where multiple Business Units will be involved in the planning and creation of content. To share this project with another Business Unit, select a sharing option in the edit project dialog.



Accessing each Business Unit to edit unique components

In contrast, there are planning components that are unique to specific Business Units and are not shareable. For example, on the workflow management page, you need to select a specific Business Unit to see the corresponding workflow(s) for that Business Unit.

On the workflow management page, a menu allows you to select a specific Business Unit to see the corresponding workflows that have been created within that Business Unit. This menu helps to quickly switch between Business Units to make modifications as necessary.



2.5 Single Sign On

Single sign on (SSO) allows your company to log into Content Marketing with credentials from your identity provider using SAML2.0 web-based authentication.

The **Manage SSO** right is required to configure single sign on. See Managing user rights for more information.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Overview

Setting up SSO helps streamline the administration of user accounts. You can configure SSO to automatically grant new users certain roles upon their first login. Then after SSO is configured, users simply need to use their SSO credentials to log in to Content

Marketing without additional user setup. To configure SSO, an identity provider must either be added manually or imported.

> **Tip**: Importing an identity provider is the preferred method of adding an identity provider. After importing the metadata, most of the configuration is completed for you.

The SSO experience for the end user can be configured to be Service Provider initiated, or IDP initiated for instances where users are accessing the applications from a centralized location, like a portal.

2.5.1 Configuring SSO

Setting up Single Sign On is a two-step process.

1. Importing an Identity Provider or Adding an Identity Provider
2. Setup Authentication Context

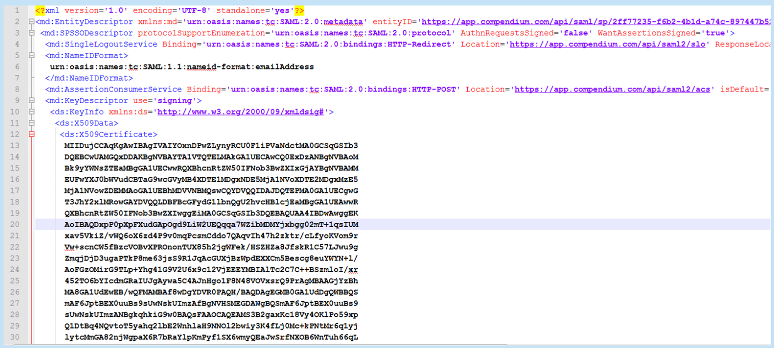
2.5.2 Importing an identity provider

After obtaining XML meta data from your identity provider you can import the metadata into Content Marketing to configure your identity provider.

Prerequisites

- You must have a correctly formatted metadata XML file from your identity provider.

Example:



To import a provider:

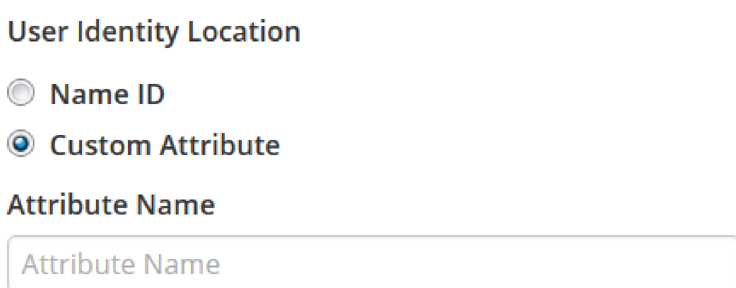
1. Navigate to **Settings** > **Single Sign-On**.
2. Click **Import from Metadata**.
3. Paste the service provider's metadata into the *Input Metadata* field.
4. Click **Import Provider**.
5. Click the **Entity Provider Certificate** drop-down list and select the identity provider name added.

6. If user provisioning should be initiated automatically from the IDP, enable **Provision new users automatically** and select the role(s) to be assigned to new users. If you want to administer the creation of users from within Compendium in part to restrict which users have

access to Content Marketing, elect to not enable this option.

> **Important**: If you do not select any roles, users will be able to login, but they must be granted rights to access areas of the interface and perform operations.

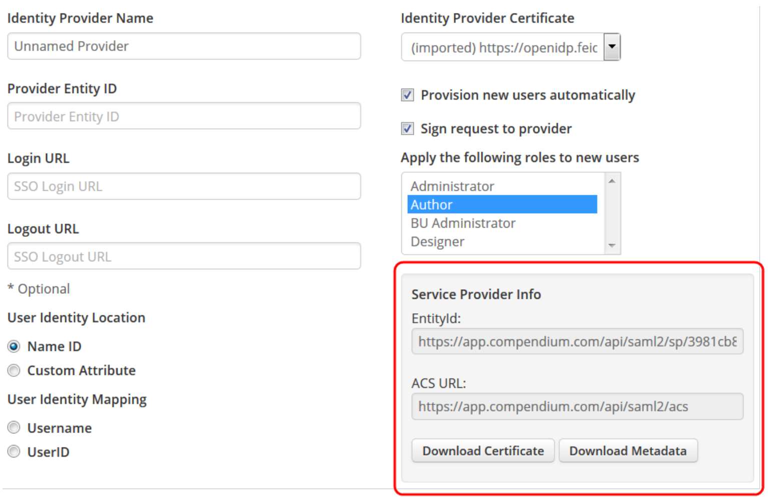
7. Select **Sign request to provider** to enable Content Marketing to sign authorization requests. This is a requirement for some identity providers.
8. Click a **User Identity Location** method. Content Marketing will use the specified identity location when access is requested.



   - **Name ID**: Select to use the user's Name ID as the user identity location.
   - **Custom Attribute**: Select to use a custom attribute as the user's identity location.
   - **Attribute Name**: Enter the custom attribute's name.
9. Select a **User Identity Mapping** method. Content Marketing will map this value to the identifier chosen as the *User Identity Location*.
   - **Username**: Select to use the user's Username to map the identity from the provider to Content Marketing.
   - **UserID**: Select to use the user's UserID to map the identity from the provider to Content Marketing.
10. Click **Save Provider**.
11. Click **Activate**.

Your identity provided was added.

After saving an identity provider, service provider information is displayed including the EntityId and ACS URL. Some identity providers require this information to configure SSO.



You can now setup Authentication Context.

2.5.3 Adding an identity provider

You can manually add an identity provider by completing the required fields during the single sign on configuration instead of importing an identity provider.

To manually add an identity provider:

1. Navigate to **Settings** > **Single Sign-On**.
2. Click **New Provider**.
3. Complete the fields to work with the configuration of your identity provider. Work with your IT team to determine the appropriate settings to enable on this configuration screen.

- **Identity Provider Name**: Enter the name of the identity provider.
- **Identity Provider Certificate**: Click to select the identity provider certificate.
- **Provider Entity ID**: Enter the identity provider's ID.
- **Provision new users automatically**: Select to automatically provision new users. If user provisioning should be initiated automatically from the IDP, enable provisioning and select the role(s) to be assigned to new users. If you would to administer the creation of users from within Compendium in part to restrict which users have access to Content Marketing, elect to not enable this option.
- **Sign request to provider**: Select to enable Content Marketing to sign authorization requests. This option should be enabled when digitally signed requests are required by the Identity Provider.
- **Digest Algorithm**:
- **Apply the following roles to new users**:
- **Login URL**: Enter the single sign on login URL.
- **Logout URL**: Enter the single sign on logout URL.
- **User Identity Location**
  - **Name ID**: Select to use the user's Name ID as the user identity location.
  - **Custom Attribute**: Select to use a custom attribute as the user's identity location.
  - **Attribute Name**: Enter the custom attribute's name.
- **User Identity Mapping**
  - **Username**: Select to use the user's Username to map the identity from the provider to Content Marketing.
  - **UserID**: Select to use the user's UserID to map the identity from the provider to Content Marketing.

4. Click **Save Provider**.
5. Click **Activate**.

Your identity provider was added. You can now setup Authentication Context.

2.5.4 Setting up Authentication Context

After you have added or imported your identity provider, setting up Authentication Context is the last step to configuring Single Sign On in your license.

Authentication Context ensures a user by email, is unique to each license. This step must be completed by submitting a ticket to My Oracle Support.

To have Authentication Context setup for your license:

1. Log in to My Oracle Support and create a service request to setup your Authentication Context.
2. There are several settings that need to be configured on setup. Include your Single Sign On preferences in this request:
   - **Enable Password Login**: Indicate if you want to allow your users to login using both the username and password fields (the traditional login style). If this is NOT enabled, users can login via SSO with just their username.
   - **Enable Name Changes**: Indicate if you want to allow name changes in the Identity Provider (IDP) to be propagated to your Content Marketing license. First name and last name are the fields that are affected. For example, if a user gets married and their last name changes in the IDP, this change will reflect in Content Marketing.
   - **Enable Username Changes**: Indicate if you want to allow username changes in the Identity Provider (IDP) to be propagated to your Content Marketing license. This scenario is most likely to happen after a real name is changed, however there are other situations where the username may change in the IDP, but will be uncommon.

> **Example**: The body of your completed support request could resemble:

```
Hi Oracle Support,

I am a customer looking to finish the configuration of Single
Sign On for my organization.

Please setup the Authentication Context for my license, the
following are my configuration preferences to support my SSO
configuration.

Enable Password Login: No
Enable Name Changes: Yes
Enable Username Changes: Yes

Thank you.
```

After the Authentication Context has been created, the support rep will notify you via your support ticket. At that time, users will be able to login with Single Sign On.

2.5.5 Signing in using single sign on

You can use your identity provider's single sign on (SSO) credentials to login to Content Marketing if your instance has configured single sign on.

To sign in using single sign on:

1. Navigate to https://app.compendium.com.
2. Click **Login with your company**.
3. Enter your company name. The company name entered must be identical to the company

name in Content Marketing.

4. Click **Submit**.

5. Enter your SSO login credentials to login.

You will be logged into your Content Marketing instance.

Note: The rights and roles you have depend on how SSO was configured in your instance. Contact your Content Marketing administrator to assign rights and roles if necessary.

2.6 Categories

Categories allow you to tag content based on the theme or concept to which they relate. When you create a post you can manually select the categories in which the topic will appear.

Oracle Content Marketing recommends categories based on a number of criteria:

- Diversity
- Client's desired focus
- Client's goals
- Search volume
- Competition level
- Effectiveness

Categories should not be modified or removed from a network. Once categories are selected, they remain with your network for the lifetime of the network.

Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

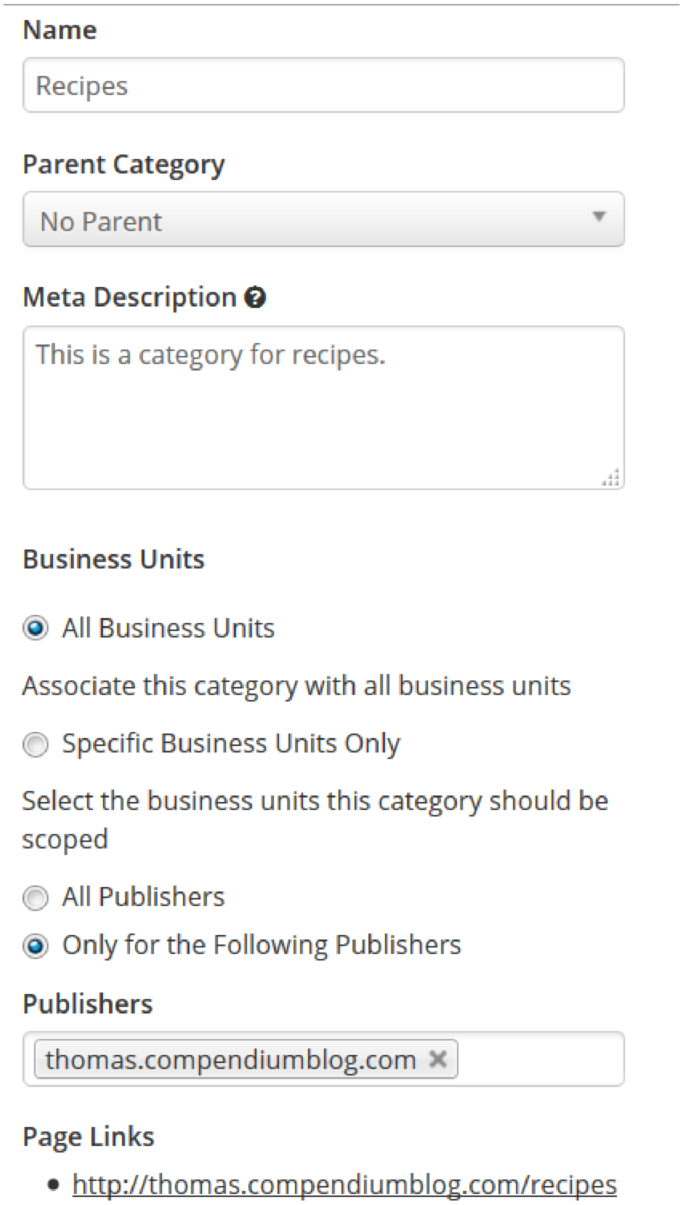
2.6.1 Adding manual categories

You have the ability to add manual categories to your license with the **Manage Categories** right.

Note: You can only add manual categories yourself. If you would like to add automatic categories to your network, you will need to contact your Account Manager for further assistance.

To add a new manual category:

1. Navigate to **Settings** > **Categories**.
2. Click **New Category**.
3. Complete the fields as appropriate.



- **Name**: Enter a name for the category. Name is the only required field.
- **Parent Category**: Select an existing category to be the parent category.
- **Meta Description**: Enter a meta description. This description influences what Google displays in search results.
- his description controls what Google displays when your category blog appears in search results.
- **Business Units**

- **All Business Units**

  Select to make this Category available to all Business Units.

- **Specific Business Units Only**

  Select to limit this Category to specific Business Units. Select the Business Units this Category will be applicable to.

Note: This option is only available in multi Business Unit licenses.

- **Publishers**
  - **All Publishers**

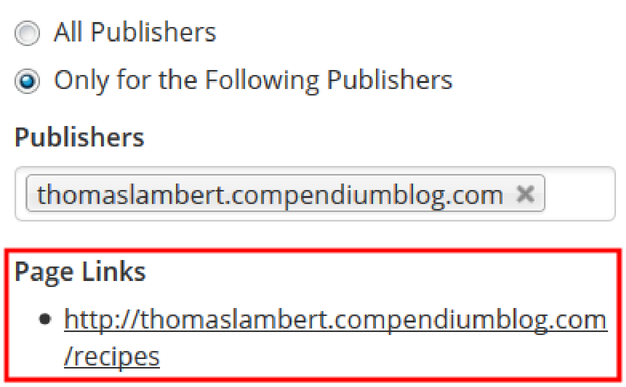
    Select to allow this Category to display for all selected publishers.

  - **Only for the Following Publishers**

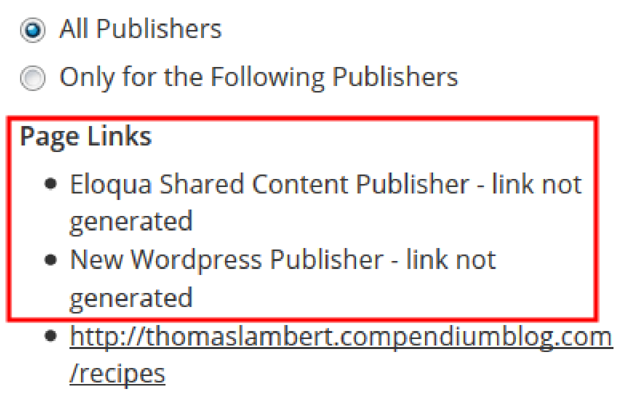
    Select to limit this Category to display for specific Publishers. The list of categories that are displayed will change based on which publisher is selected for a content asset.

- **Page Links**

  URLs to the category pages are displayed here (if applicable to the publisher). This section is only displayed after the Category is saved.



If any Publishers are associated with the category, but a URL cannot be generated, "link not generated" will display beside the publisher name.



4. Click **Save Category** to save your changes.

Note: If you would like to remove a category, select the category from the left-side list, then click **Delete**. It is a best practice to set up a 301 redirect from the URL that you are deleting to a different URL, such as your main blog page. Learn more about creating redirects.

2.6.2 Assigning authors to manual categories

As an Administrator, you have the ability to assign all of an Author's posts to appear on a manual category page without the author having to manual associate it themselves.

Example: John Smith and Jane Doe work in the Marketing department and one of your network's manual categories is 'Marketing Tips.' By assigning their accounts to that category, all of their content will automatically appear there.

To assign Author's posts to a manual category page:

1. Login to the Oracle Content Marketing application with your Administrator credentials
2. Navigate to **Settings** > **Users**, then locate the Author to whom you want to assign a manual category.
3. Click the pencil icon to the right of their information to *Manage User Profile*.
4. Navigate to *Default Categories* in the left-side pane and select the check box(es) next to the desired manual category or categories.
5. Click **Save Default Categories**.

2.6.3 Editing category meta descriptions

As an Administrator, you have the ability to edit the meta-description for your network's categories, this description controls what Google displays when your category blog appears in search results.

To edit the meta description of a category:

1. Navigate to **Settings** > **Categories**, then select the category you would like to edit.
2. Edit the meta description as needed.
3. Click **Save Category** to save your changes.

2.7 Content Languages

Content Languages in Oracle Content Marketing allows marketers to define a set of content languages that can be used to better organize their content assets. There are no limits to the number of languages that can be created to store in Content Marketing.

Overview

Defining new languages broadens the localization opportunities of your content assets.

After you have defined a set of content languages you can:

- Filter the content repository to display language specific content assets

  Display only the content assets that are tagged with a specific language.

- Add an additional rule in Workflow

  When adding Workflows, you can specify if the Workflow should be applied to assets with specific languages.

- Define keyword suggestions by language

  Create keyword suggestions that are language specific so content authors are presented with language-specific keyword suggestions.

Note: The **Manage Multiple Languages** right is required to manage languages. See Creating custom roles for more information.

Learn more: For more information, sign up for the Oracle Content Marketing: Business Units course from the Oracle Marketing Cloud Academy.

2.7.1 Adding Content Languages

Add content languages to broaden localization opportunities for your content assets. There are no limits to the number of languages that can be created to store in Content

To add a language:

1. Navigate to **Settings** > **Content Languages**.
2. Click **Add Language**.
3. Enter a name to identify the language.
4. Enter a language code to identify the language.
5. Select **Is Default** to make this language the default language.
6. Click **Save**.

The language was added.

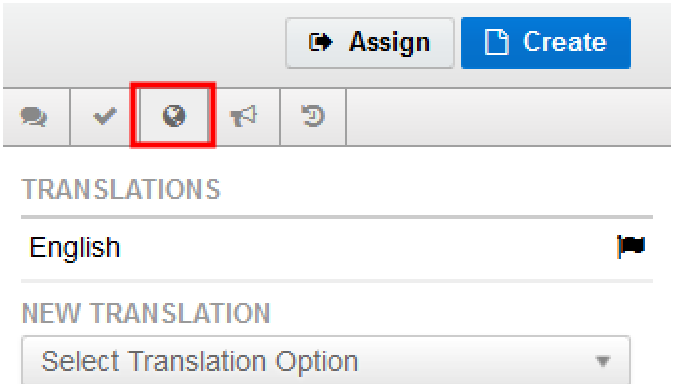
2.7.2 Managing localized assets

Content Marketing allows you to create and manage localized content assets. Assets that are created with the intention to be localized can be organized into collections. A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection of localized assets will include an original source, and one or more derivative translations of that source asset.

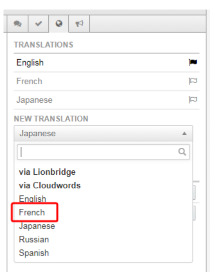
> **Note**: A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection is created when content assets are either repurposed or translated into another language.

To create an asset translation:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset you want to translate and click the translation panel.

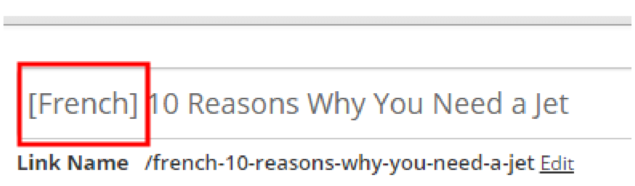


3. Click the **New Translation** drop down menu and select a language to translate the content into. You can add Languages by navigating to **Settings** > **Content Languages**.

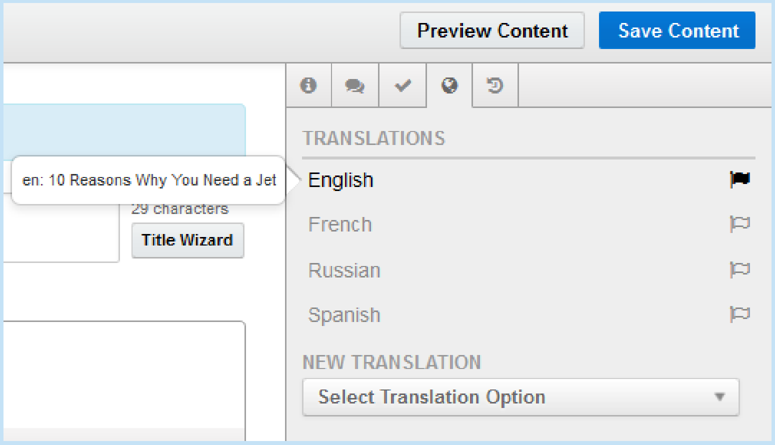


You have created an asset translation.

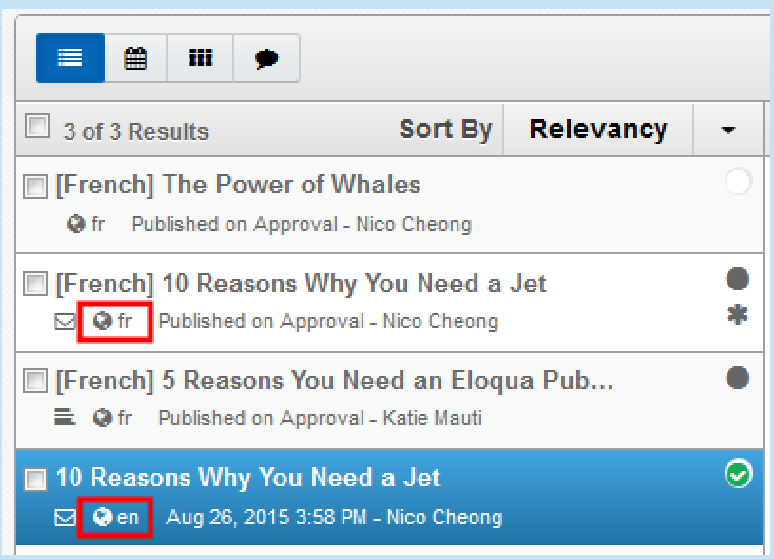
You will be redirected to the asset editor to create the localized asset. The language you have selected for the translation will be inserted into the title field for the content asset.



Tip: While in the editor, you can also click the label for any other language to edit the asset available in that language.



Within a collection in the content list, reviewing the language code is one of the clearest ways to identify a content asset available in a specific language. The language code is displayed to the left of the asset's publish date.



2.7.3 Setting a Business Unit's default language

Set the default language of a Business Unit to the language that content assets will be created for most often. The operation differs depending on the amount of Business Units your license allows.

- Setting the default language for multiple Business Units
- Setting the default language for a single Business Unit

Setting the default language for multiple Business Units

For a license of Content Marketing that has been configured with more than one Business Unit, the administrator can set a default language for each individual Business Unit.

> **Example**: Marketing teams are working in different regions and creating content localized for that region.

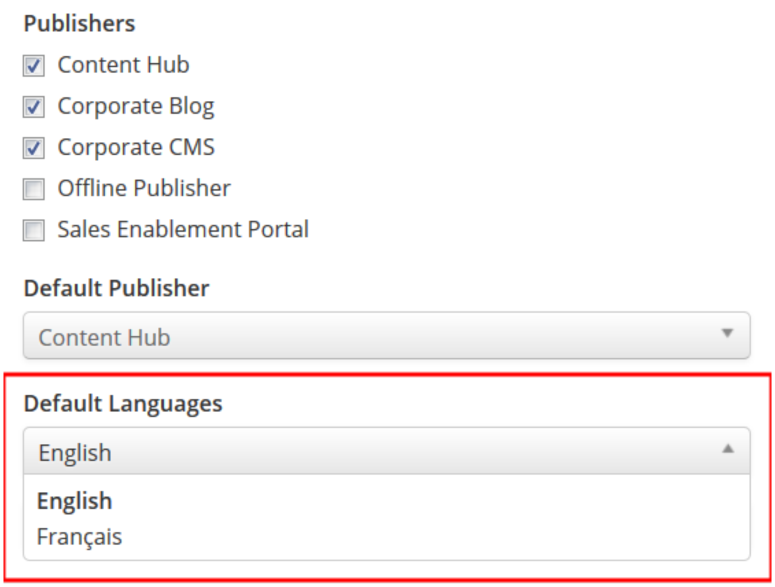
Prerequisites

- A user assigned the **Business Unit Administrator** role with the **Manage Business Units** right is required to perform this operation.

To set a default language for a Business Unit:

1. Navigate to **Settings** > **Business Units**.
2. Select a Business Unit.

3. Click the **Default Languages** drop-down list and select a language to be the default.



4. Click **Save Business Unit**.

The default language has been modified for the Business Unit.

Setting the default language for a single Business Unit

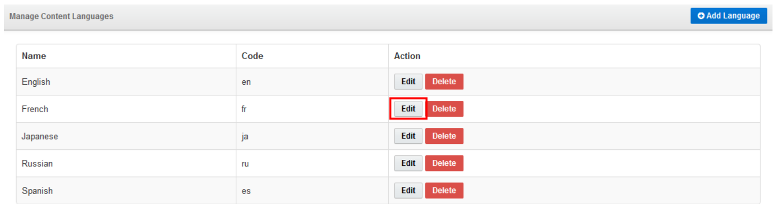
Set the default language for a single Business Unit configuration.

Prerequisites

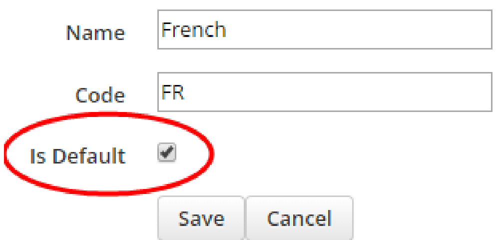
- The **Manage Multiple Languages** right is required to perform this operation.

To set a default language for a single Business Unit:

1. Navigate to **Settings** > **Content Languages**.
2. Click **Edit** for the language you want to make the default language. If you do not have any languages, see Adding Languages.



3. Select **Is Default** to set the language to be the default.



4. Click **Save**.

The default language was changed.

2.8 Content Types

Content types are an organizational tool used to structure your posts, they are the dominant factor in the post. For example, text, image, video, file, and so on.

As an administrator, you can create different content types to help your users structure their post. By default, your network will have *Text*, *Page*, and *Email Block* content types. Text content types are all-encompassing posts that include the content editor and all of its features. Page content types are landing pages. Email Blocks are intended to be the components used to compose emails.

Example: Additional content types may include: Rich Text Editor, Image Upload, File Upload, Video, Plain Text Editor, and so on.

Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

2.8.1 Creating content types

As an administrator you can create new content types to help structure and organize user-created posts.

To create a new content type:

1. Navigate to **Settings** > **Content Types**, then click **New Content Type** in the upper right-hand corner.
2. Enter a name in the *Content Type Name* field.
3. Select a *Primary Editor* for the content type, the following is a list of the editors and their available options:
    - **Rich Text Editor**: The all-encompassing content editor.
        - Show Content Score - If selected, this will show the content score in the right column.
        - Show Related Content - If selected, this will show the related content in the right column.
    - **Image Upload**: Allows you to upload an image as the focus of the post.
        - Show Text Description Field - If checked, this will show the text description field.
    - **File Upload**: Allows you to upload a file as the focus of the post. A preview of the file is

displayed once it is uploaded to Content Marketing. Authors can replace uploaded files or download files from content assets within Content Marketing.

- Show Text Description Field - If checked, this will show the text description field.

> **Note**: All files uploaded to Content Marketing are publicly accessible on the Content Delivery Network. Attachments uploaded using the interface are limited to 25MB, however, there are no file size limitations when pushing attachments into Content Marketing through the API.

- **Video**: Allows you to insert a video using standard embed codes, such as an iframe embed code, from an external source like YouTube, Vimeo, or from a Video Cloud platform. View Apps for supported Video Cloud platforms in Content Marketing.
  - Show Text Description Field - If checked, this will show the text description field.
- **Plain Text Editor**: This is a blank, plain-text HTML editor.
  - Show Content Score - If checked, this will show the content score in the right column.
  - Show Related Content - If checked, this will show the related content in the right column.

4. Select *Make all Content a Landing Page* if you want the content to serve as a landing page instead of a text post. Landing Pages will not appear in blog listings. Fixed Landing Pages can be set with the publisher settings. View Adding an Oracle Content Marketing CMS publisher for more information.
5. Click  to select an icon that will be associated with the content type. This is purely aesthetic.
6. Specify whether or not this Content Type should be applicable to **All Business Units** or **Specific Business Units Only**.

Note: This option is only available in multi Business Unit licenses.

7. Click **Save Type** to save your content type.

Note: Once Content Types have been added and saved, users can set the order of how the types will display within the user interface. For example, content types display on the dashboard and when a contributor selects which type to use when creating new content. Click and drag a particular type to a different location within the list to define the desired order.

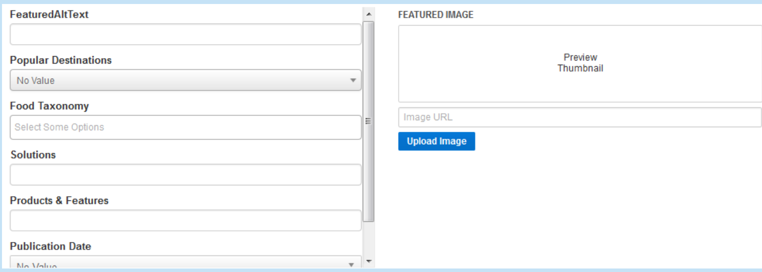
2.9 Custom Fields

Custom fields provide a method to associate metadata with your content assets that can make finding and working with content assets easier.

A couple of examples of how you might use custom field metadata include:

- Tagging content assets with Brand, Region, Vertical, and Channel information to guide usage and targeting.
- Tagging content assets with tag and keyword information that can be pushed over to Wordpress to customize template presentation.
- Tagging content assets with Product, Solution, and Industry information which can be used to sort views on the marketing calendar.

Example: The content asset below has been modified to include multiple custom fields for a number of reasons.



Information stored in custom fields on a content asset can be retrieved from the API, or you can view custom field data in the authoring UI by editing a content asset and viewing the associated custom fields.

When creating custom fields, you can configure them to appear in the **Basic/Advanced** tabs or above/below the content editor. Use the ability to control where custom fields appear to fit the authoring workflow for your team.

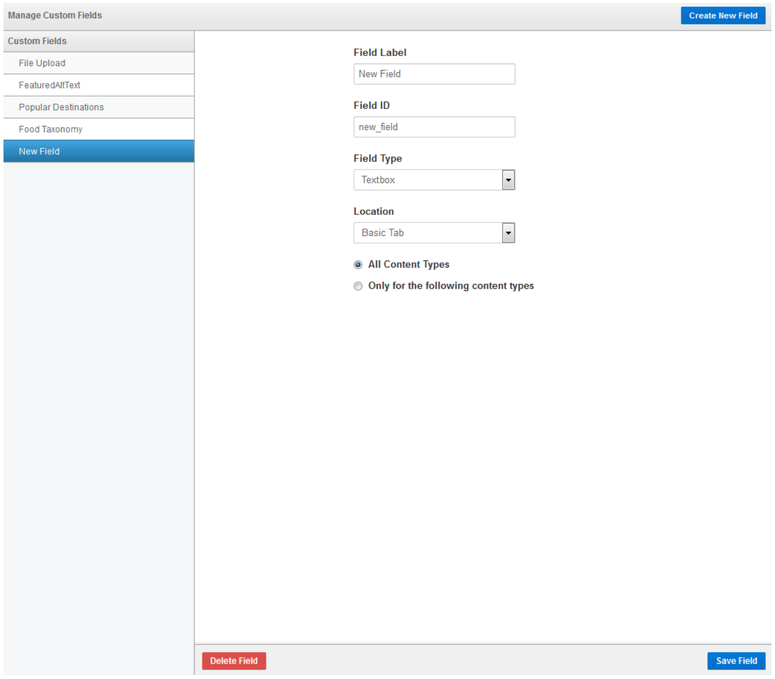
Learn more: For more information, sign up for the Oracle Content Marketing: Basic Configuration course from the Oracle Marketing Cloud Academy.

2.9.1 Creating custom fields

You can create custom fields to associate metadata with your content. Custom fields are also created to be used in StoryCapture.

To create a custom field:

1. Navigate to **Settings** > **Custom Fields**.



2. Click **Create New Field**.

3. Complete the fields as appropriate.

   - **Field Label**: Enter a name for the custom field.
   - **Field ID**: Enter an identifier for the custom field. The Field ID will mirror the Field Label by default, but you can modify this ID as needed.
   - **Field Type**: Select a field type.
     - **Textbox**: Select this option to insert a small textbox.
     - **Large Textbox**: Select this option to insert a large textbox. There are no character limits on data that can be stored in this field.
     - **Checkbox**: Select this option to insert a checkbox.
     - **WSIWYG Editor**: Select this option to insert a WSIWYG editor. There are no character limits on data that can be stored in this field.

        - **Single Selection Dropdown**: Select this option to create a list of drop-down options where only a single option can be selected. If there are more than 15 options defined, the drop-down will include a search option.
        - **Multiple Selection Dropdown**: Select this option to create a list of drop-down options where multiple options can be selected.
        - **File Upload**: Select this option to allow users to upload and attach files to the content.
    - **Location**: Select a location for the custom field.
        - **Basic Tab**: Select to insert this custom field within the Basic tab.
        - **Advanced Tab**: Select to insert this custom field in the Advanced tab.
        - **Above Editor**: Select to insert this custom field above the asset editor.
        - **Below Editor**: Select to insert this custom field below the asset editor.
    - **All Content Types**: Select to apply this custom field to all content types.
    - **Only for the following content types**: Select to apply this custom field to specific content types.
4. Click **Save Field**.

> **Note:** Once Custom Fields have been added and saved, users can set the order of how the fields will display within the user interface. For example, custom fields display within the editor - changing the order of the fields will determine the top to bottom order of how those fields display within the defined location. Click and drag a particular field to a different location within the list to define the desired order.

Your custom field was saved.

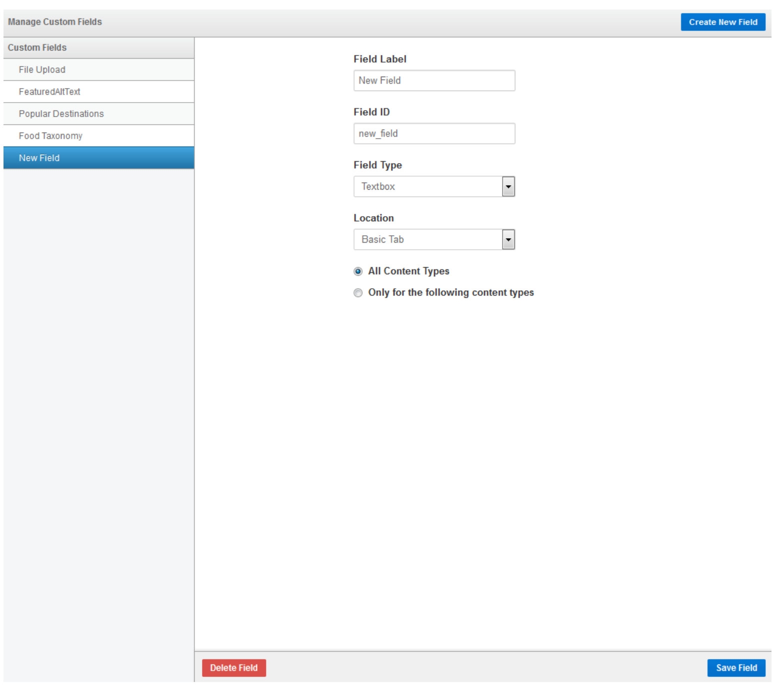
Note: Consistent marketing usage of custom fields across Business Units is possible through the creation of shared content types. Content types are only visible when shared with a specific Business Unit, therefore a content type must be shared with a specific Business Unit in order to share any custom fields. See Business Unit content planning and production components for more information.

2.9.2 Deleting custom fields

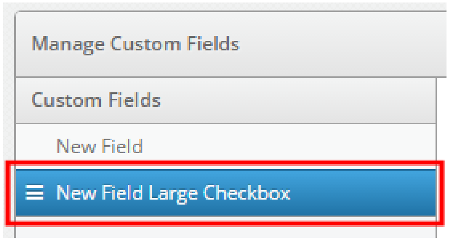
Delete custom fields that are no longer required.

To delete a custom field:

1. Navigate to **Settings** > **Custom Fields**.



2. Select the custom field you want to delete.



3. Click **Delete Field**. In the confirmation dialog that appears, click **Delete Field**.

The custom field is deleted.

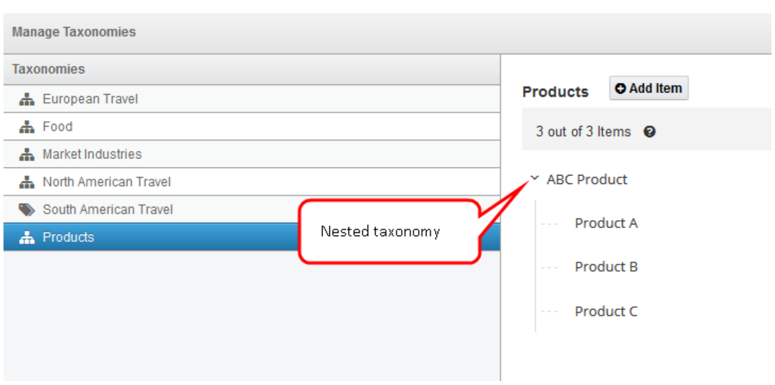
2.10 Taxonomies

Content Marketing's Taxonomies capabilities provide marketing teams greater flexibility for organizing content around taxonomy structures that can be mapped to other individual Content Management Systems or source of truth systems that manage taxonomies across a set of Customer Experience applications.

Use Cases

Some sample cases for using this capability include:

- Using a Nested Taxonomy that describes a portfolio of products, where the taxonomy can be mapped for usage with specific types of marketing content created to support these products



- Importing and syncing Custom Taxonomies from Wordpress for greater flexibility in publishing

2.10.1 Setup Tasks

There are four steps required in order to get setup to use content taxonomies:

Assigning user rights for Taxonomies

Creating a Taxonomy or Importing Taxonomies

Configuring a Taxonomy for use within the Content Editor

Using Taxonomies in the Editor

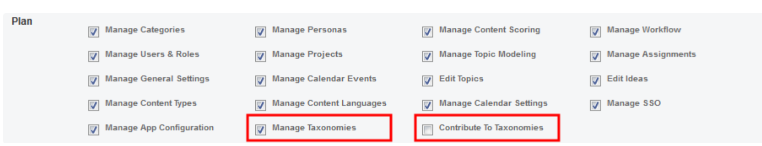
2.10.2 Assigning user rights for Taxonomies

Administrators can grant access to users that will administer or contribute to content taxonomies.

To assign user rights for Taxonomies:

1. Navigate to **Settings** > **Rights & Roles**.

2. Select the user role you want to modify, and then select the Taxonomy right you want that user role to have.



   - **Manage Taxonomies**: Enables the user to administer Taxonomies, including the ability to import as well as add, edit, and delete.

   - **Contribute To Taxonomies**: Enables the user to create new Taxonomies items within the content editor. Items added within the editor are also added into the Taxonomy and become available to others to re-use.

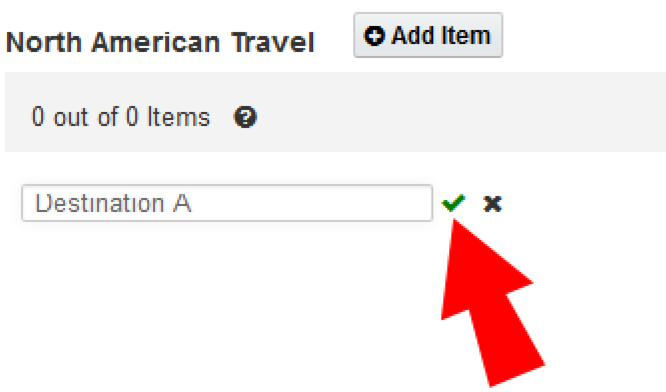
3. Click **Save Role**.

2.10.3 Creating a Taxonomy

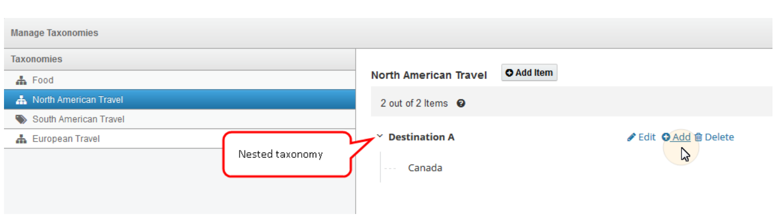
Users have the option to create new taxonomies from scratch, or import existing taxonomies from Wordpress that will be used when publishing content to Wordpress.

To create a new taxonomy:

1. Navigate to **Settings** > **Taxonomies**, then click **New Taxonomy** in the upper right-hand corner.
2. Enter a name and description for your new taxonomy. Later in the configuration your taxonomy will be setup as a custom field; the name of your taxonomy should be easy to remember when creating the mapping.
3. Click **Save Taxonomy**.
4. Begin adding items to your taxonomy. Click **Add Item** and enter the name of your taxonomy item and either press **Enter** or click the green check mark.



5. To create nested items, hover beside any item and options to **Edit**, **Add**, or **Delete** will appear. Click **Add**. Enter the name for the items and press **Enter** or click the green check mark. Add other items as necessary to your taxonomy.



An icon displays next to each available Taxonomy to indicate its type. The following is an overview of the meaning of each icon.

Taxonomy Icons

- **Nested** - This icon indicates that the taxonomy is a hierarchy, with nested (parent / child) items.
- **Tags** - This icon indicates that this is a tags taxonomy. Tags taxonomies are flat, with no nesting.
- **Sync** - This icon indicates that items are synced from an external system. A synced taxonomy may be a Nested or Tags. A synced taxonomy can only be deleted, the attributes and items of this taxonomy cannot be edited as it is synced externally.

After the Taxonomy is created you must configure the Taxonomy for use in the content editor before you can use it.

2.10.4 Importing Taxonomies

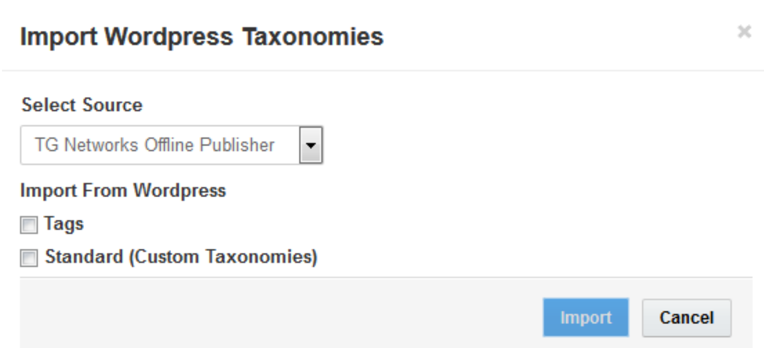
You can import Custom Taxonomies from your Wordpress publisher for greater flexibility when publishing back to Wordpress.

> **Best practice**: The recommended practice for using a taxonomy import is when the taxonomies that exists in Wordpress (categories, tags, or custom taxonomies) is maintained by a third-party taxonomy solution. Third-party taxonomy solutions provide centralized governance over taxonomy items that are then synced across multiple content solutions, to ensure tagging integrity for content and providing a consistent browsing experience within a given tool for the end users.

The import function is specialized to support this use case, and is not intended to be used in a situation where a technical administrator is configuring taxonomy items in both Content Marketing and Wordpress manually. For the majority of customers whose use case is more simple, where they are just distributing content to Wordpress, the general Wordpress Import should be used instead. The general Wordpress import serves as a one-click setup to import all content, users and taxonomies like tags and categories for use within Content Marketing.

To import content from Wordpress:

1. Navigate to **Settings** > **Taxonomies**.
2. Click **Import Wordpress Taxonomies**.
3. Select a source from the drop down menu. Any active Wordpress publishers will display in this list.
4. Choose what to import from Wordpress.

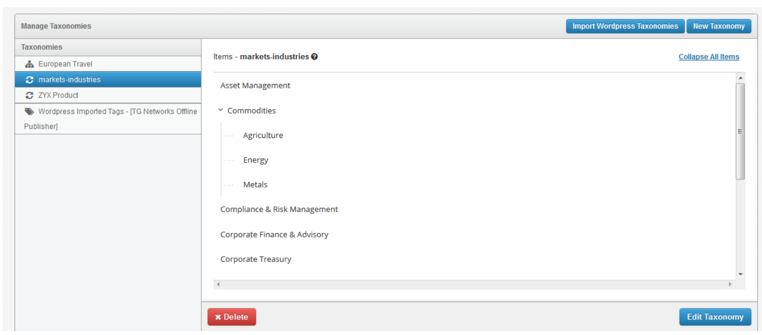


- **Tags** will import any tags that exist within Wordpress, whether those tags are actively assigned to an asset in Wordpress or not.

- **Standard (Custom Taxonomies)** will import the Custom Taxonomies in Wordpress including the entire hierarchy.

5. Click **Import** to start importing the selected taxonomies.

After the import has completed, you will see your Wordpress taxonomies available for use within Content Marketing. A synced taxonomy can only be deleted outright, the attributes and items of this taxonomy cannot be edited as it is synced externally.



Taxonomies are synced from Wordpress every 24 hours. Updates made within Wordpress or within an external tool will take 24 hours to propagate into Content Marketing.

An icon displays next to each available Taxonomy to indicate its type. The following is an overview of the meaning of each icon.

Taxonomy Icons

- **Nested**  - This icon indicates that the taxonomy is a hierarchy, with nested (parent / child) items.
- **Tags**  - This icon indicates that this is a tags taxonomy. Tags taxonomies are flat, with no nesting.

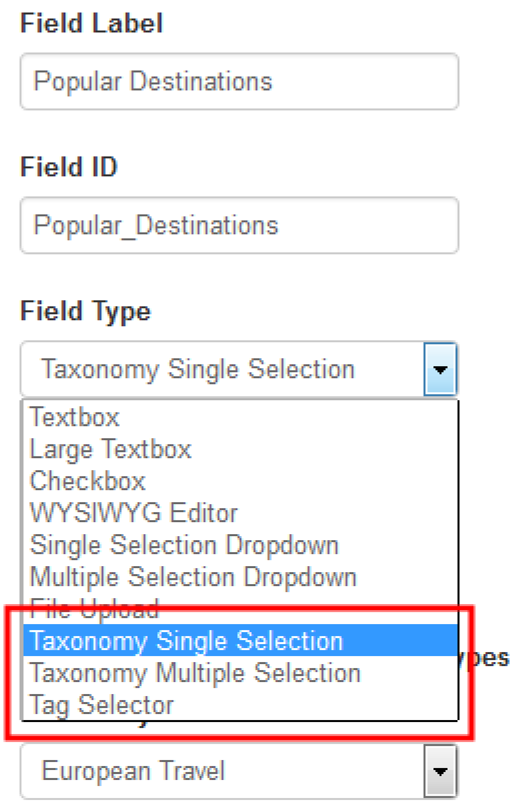
- **Sync** - This icon indicates that items are synced from an external system. A synced taxonomy may be a Nested or Tags. A synced taxonomy can only be deleted, the attributes and items of this taxonomy cannot be edited as it is synced externally.

2.10.5 Configuring a Taxonomy for use within the Content Editor

For users to be able to tag assets with items from the taxonomy, the taxonomy must first be set up as a Custom Field and assigned to the appropriate Content Types. After this step the configuration is complete, and the taxonomy will be available to use in the editor.

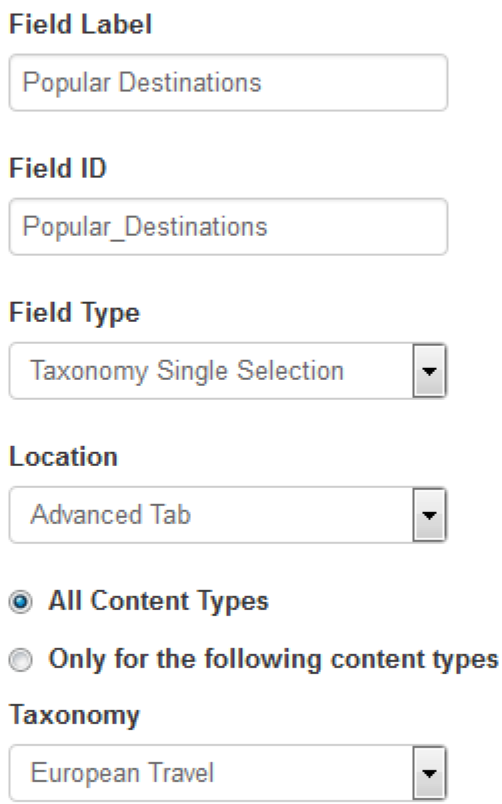
To configure a taxonomy to be used within the Editor:

1. Navigate to **Settings** > **Custom Fields**.
2. In Field Type, select from one of the three taxonomy field type options: **Taxonomy Single Selection**, **Taxonomy Multiple Selection**, or **Tag Selector**.



- **Taxonomy Single Selection** - Allows users to select a single taxonomy option for an asset
- **Taxonomy Multiple Selection** - Allows users to select more than one taxonomy option for an asset
- **Tag Selector** - Allows users to select more than one tag item

3. Choose the **Location**, where the field should appear in the editor.
4. Choose whether the custom field using the taxonomy should be available for all content types or only specific content types.
5. Choose the Taxonomy that should be mapped to the custom field.



Depending on the field type selected, the selection dropdown will be pre-filtered to match. In the screen above, the user is selecting **Taxonomy Single Selection**. The drop down below that says **European Travel** will only include Taxonomies that are a Standard (nested) type.

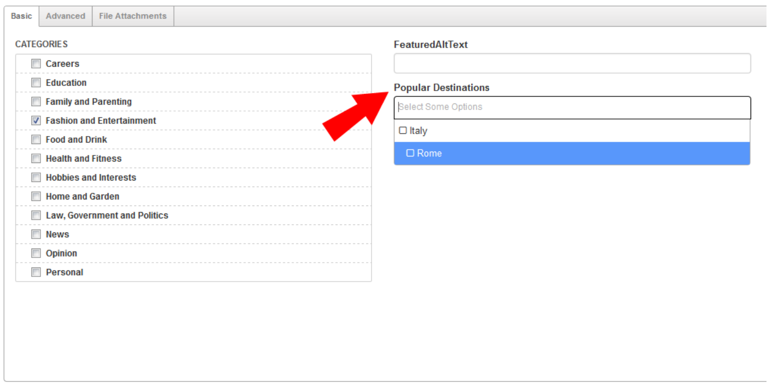
6. To finish, click **Save Field**.

Your Taxonomy is now configured to be used in the editor, now you can start using the Taxonomy.

2.10.6 Using Taxonomies in the Editor

Once the selected taxonomies have been configured as Custom Fields, they will appear in the Content Editor. Select a Taxonomy item to associate with your content, complete any remaining edits and save the asset.

How the user interacts with the Taxonomy will depend on the rights they have been granted. Every user will be able to add a Taxonomy Item to an asset. If that user has the right to *Contribute to Taxonomies*, they will be able to create select from the existing items or create their own.



Filtering by Taxonomy Items

You can use the filter in order to locate pieces of content that have been tagged with specific taxonomy items.

To filter by Taxonomy items:

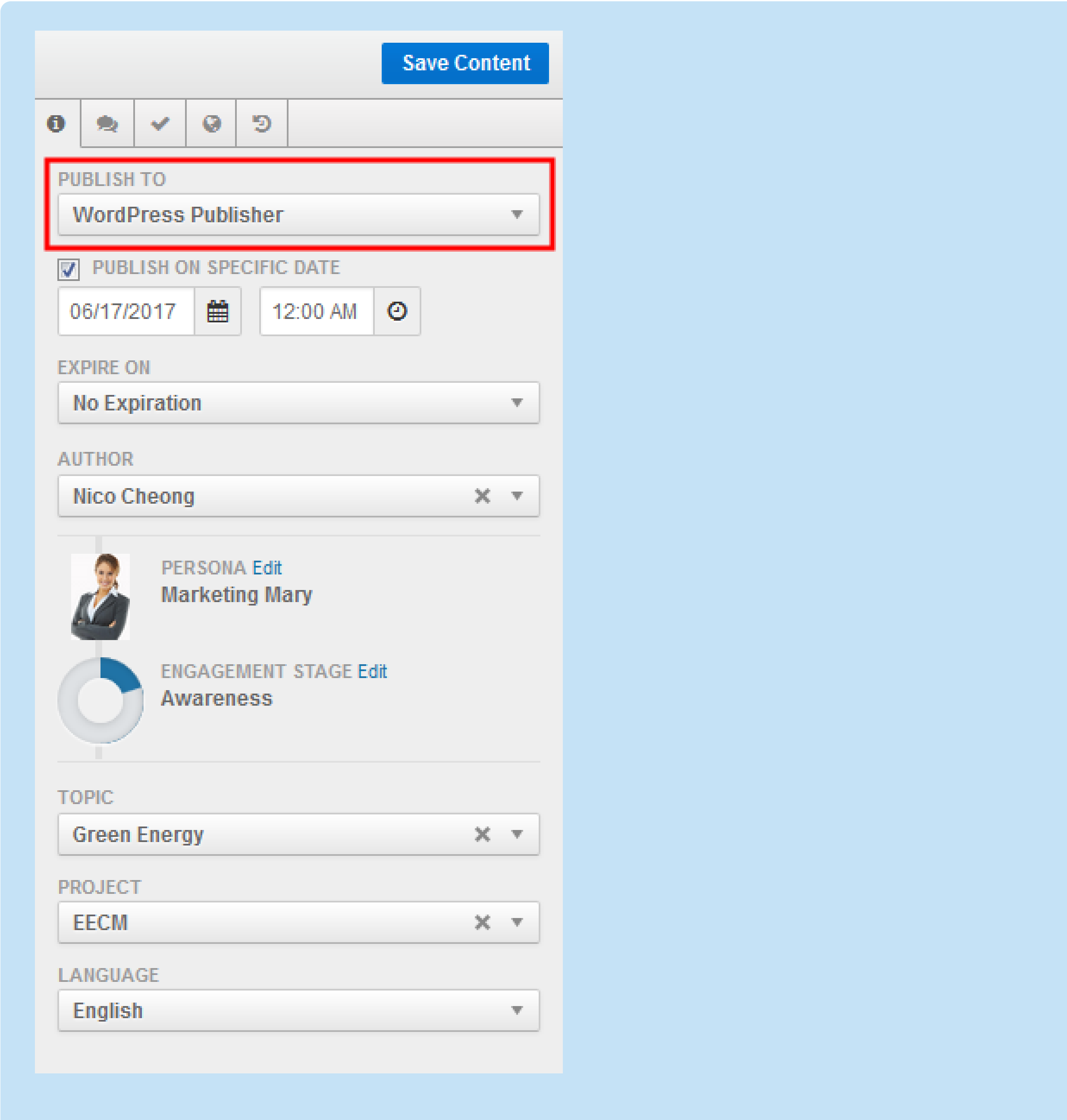
1. Navigate to **Produce** > **Manage Content**.
2. Click the **Filter** button.
3. The name of your taxonomy will be listed under **Custom Fields**.
4. Make a selection from the drop down menu, and any results containing that taxonomy will appear in the content list.

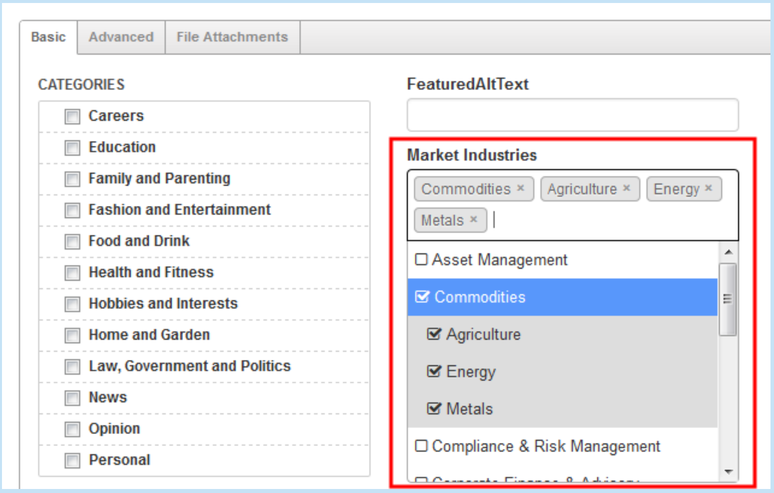
Publishing Example Wordpress

One of the primary use cases for using Taxonomies in Content Marketing is so that users can publish content to Wordpress tagged with the right items, and administrators can support a wider range of Taxonomies from Wordpress within Content Marketing.

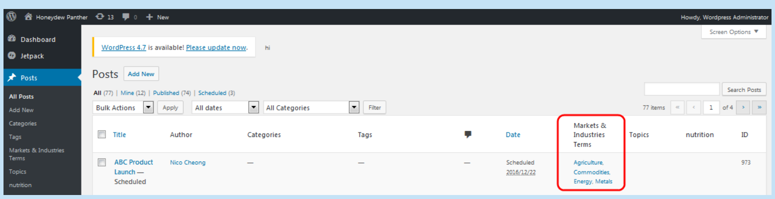
Let’s look at an example of the publishing flow to Wordpress to illustrate the end result of what you’re able to achieve.

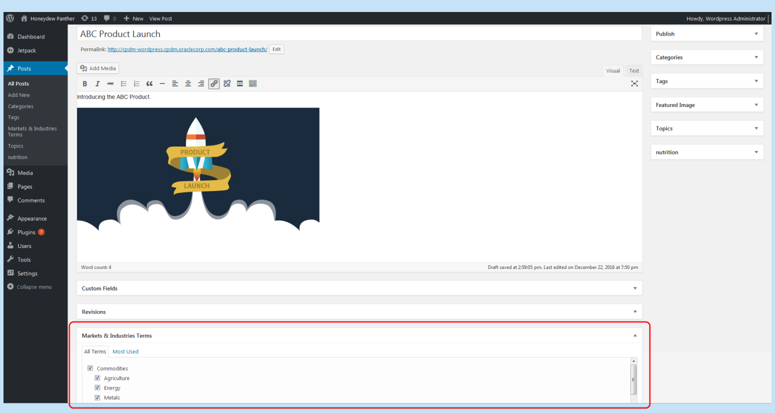
Example: We are authoring an asset that we want to publish to our Wordpress site, tagged with several items from our Taxonomy named **Market Industries**. Our asset is set to publish to Wordpress, we've drafted the content and we've tagged the content asset with a few items including: **Commodities**, **Agriculture**, **Energy**, and **Metals**.


Save Content
PUBLISH TO
WordPress Publisher
PUBLISH ON SPECIFIC DATE
06/17/2017
12:00 AM
EXPIRE ON
No Expiration
AUTHOR
Nico Cheong
PERSONA Edit
Marketing Mary
ENGAGEMENT STAGE Edit
Awareness
TOPIC
Green Energy
PROJECT
EECM
LANGUAGE
English



Here are a couple of screenshots showing our asset *ABC Product Launch*, showing the tags from *Market & Industries Terms* that have been applied.





2.11 Publishers

A Publisher is a service which provides a method of publishing and distributing content.

Oracle Content Marketing (OCM) offers many different options for publishing and distributing content. These options can be combined in any manner and used simultaneously within any OCM instance; an instance is not limited to a particular publishing option.

- **Oracle Content Marketing CMS** (Content Management System)

  The Oracle Content Marketing CMS is designed specifically for content marketing hubs and blogs. If you either do not have a publishing service or are unsatisfied with your existing publishing service, publishing to the OCM CMS is a good starting point. As a hosted platform, it provides both the flexibility and simplicity marketing teams require and the security and stability that exceeds enterprise IT demands.

- **External Connection** (Push API Integration)

  An External Connection publisher (also known as Push API Integration) is best suited when OCM is used to manage the production of content assets that are distributed to another platform. This option allows you to listen for and receive events from OCM whenever a content asset is changed.

- **Generic / Offline**

  A Generic / Offline publisher allows marketing teams to publish content to Content Marketing's content repository to provide their internal teams with a central, non-public location to source content. This publisher is commonly used by marketing teams that are creating collateral that will be consumed and distributed by a salesforce.

- **Wordpress**

  A Wordpress publisher is used to publish content from Content Marketing directly into Wordpress. After a Wordpress publisher has been added, you can also import content from Wordpress into any Publisher. To learn more about the Wordpress import, or if you have not already set up Wordpress integration, see Integrating with Wordpress.

- **Eloqua**

An Eloqua publisher is used to automatically push content to Eloqua once it has been approved through workflow. The Eloqua publisher pushes the full, unmodified body of a content asset into the *Shared Content* folder within Eloqua.

- **Aggregate**

  An Aggregate publisher is used to compile content from multiple publishers into one location. Content published using a Content Marketing CMS or Wordpress publisher will be automatically aggregated using the Aggregate publisher. All other publishers are excluded.

- **Drupal**

  A Drupal publisher is used to automatically push content to Drupal once it has been approved through workflow.

After adding publishers, you can set a default Publisher which provides convenience when your organization is publishing to one destination more often than others publishers. However, if your instance contains multiple Business Units, you might want to configure the default publisher differently for each Business Unit.

> **Note**: Limitations exist on how many publishers can be created for each license of Content Marketing. Please contact your Account Representative for up-to-date information on how many publishers are available for your trim of Content Marketing.

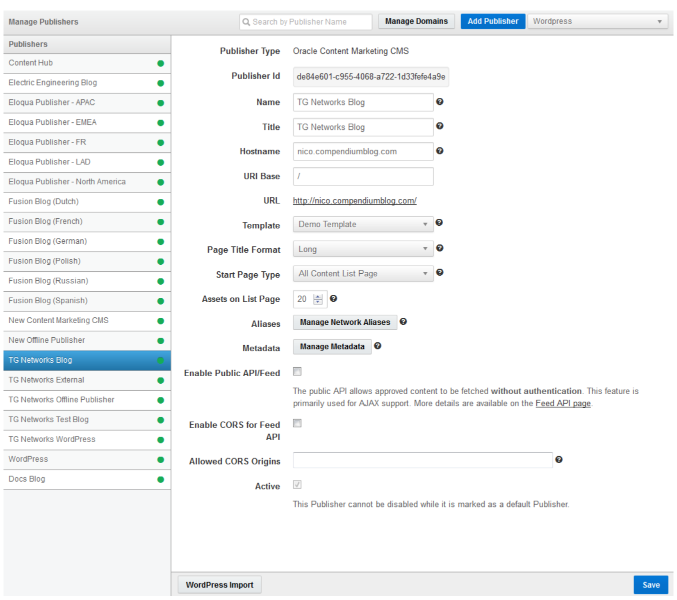
Learn more by watching the video

2.11.1 Adding an Oracle Content Marketing CMS publisher

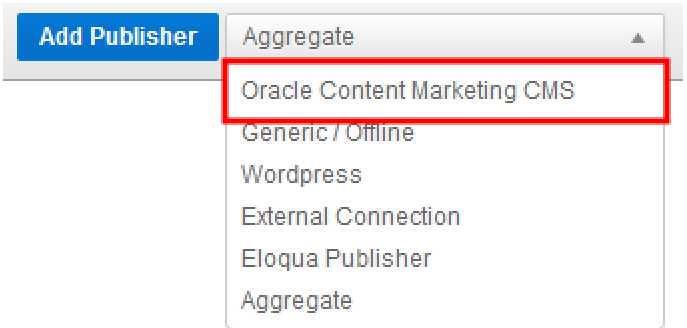
The Oracle Content Marketing (OCM) CMS is a native web CMS designed specifically for content marketing hubs and blogs. As a hosted platform, it provides both the flexibility and simplicity marketing teams require and the security and stability that exceeds enterprise IT demands. From a design perspective, the CMS can be customized to match any design and layout. From a technical perspective, the Oracle Content Marketing CMS supports up to date standards for publishing content, including HTML5, and creation of responsive templates optimized for mobile experiences. The publishing template layer can be created with minimal design and web development resources. If you do not have an internal design or development resources, Oracle Marketing Cloud services team is highly experienced at creating these templates, as are Oracle Marketing Cloud partners.

To add an Oracle Content Marketing CMS publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click the drop-down list and select **Oracle Content Marketing CMS**.



3. Click **Add Publisher**.

4. Complete the fields as required.

   - **Name**: Enter a unique name for the publisher.
   - **Title**: Enter a title for the publisher. This field is optional and is used externally in the native Oracle Content Marketing Web CMS and via the API. It is also used in the web page title tag that web visitors see in the browser tab.
   - **Hostname**: Enter a hostname. The OCM CMS is commonly used to publish to a subdomain. For this use case, the hostname must have a CNAME DNS record pointed to www.compendiumblog.com.
   - **URI Base**: Enter a URI base. The URI base is a string of characters that will be appended to your URL. Each URI base must be unique, the publisher configuration will prevent users from creating multiple publishers with the same URI base.
   - **URL**: A read-only field displaying the URL of your publisher.
   - **Template**: Click the drop-down list to select a template. If no templates appear, you must create a template in the Template Editor. See Content Hubs for more information.
   - **Page Title Format**: Click the drop-down list to select a page title format. A page title will be automatically generated with data from your asset. The options are:
     - **Short**: The short page title format is "**{Asset title} | {Publisher title}**".
     - **Long**: The long format is "**{Asset title}-{Author blog title} | {Publisher title}**".

The page title can be overridden by editing the content asset directly (click the **Advanced** tab and enter the title in the **Title Tag** field).

- **Start Page Type**: Click the drop-down list to select which format is used to load content assets by default on the homepage. The options are:
  - **All Content List Page**: Loads the most recent assets.
  - **Category List Page**: Loads recent assets for a specific category.
  - **Content Asset**: Loads a specific content asset.
  - **Landing Page**: Select a specific page to display for your hub. Selecting this option will display a list of Page content types that have been associated with this publisher.
- **Asset ID**: Enter the asset ID for the asset you want to load.
- **Category ID**: Enter the category ID for the assets you want to load on the homepage.
- **Assets on List Page**: Enter the amount of assets you want to load on category and author blog pages.
- **Aliases**: Manage your network aliases.
- **Metadata**: Manage Publisher Metadata.
- **Enable Public API/Feed**: Select to allow approved content to be fetched without authentication. This feature is primarily used for AJAX support. For more information, see Feed.
- **Enable CORS for Feed API**: Select to allow cross-origin resource sharing. Allows this Feed API to be used on domains other than app.compendium.com. For more information, see Feed.
- **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

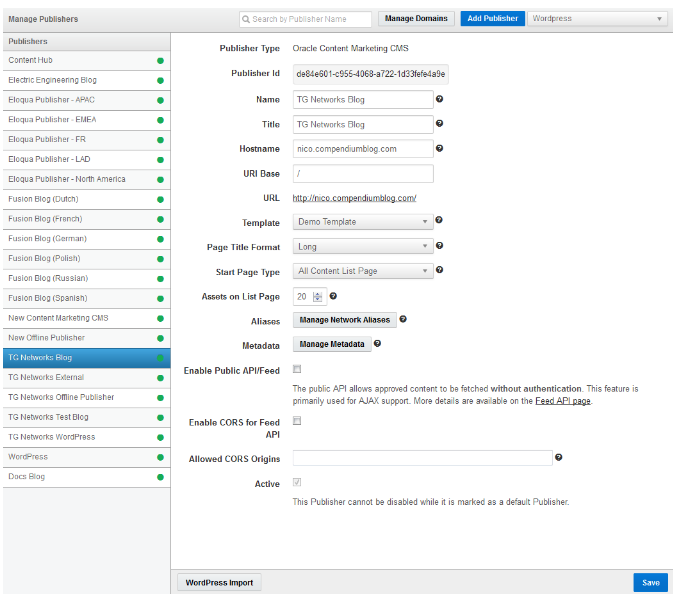
Your Oracle Content Marketing CMS publisher was added. If you are importing data from Wordpress, see Importing data from Wordpress for more information.

2.11.2 Adding a Generic / Offline publisher

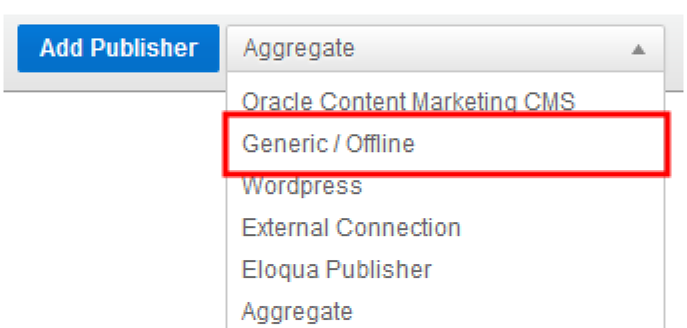
A Generic / Offline publisher allows marketing teams to publish content to Content Marketing's content repository to provide their internal teams with a central, non-public location to source content. This publisher is commonly used by marketing teams that are creating collateral that will be consumed and distributed by a salesforce.

To add a Generic / Offline publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click the drop-down list and select **Generic / Offline**.



3. Click **Add Publisher**.

4. Complete the fields as required.

    - **Name**: Enter a unique name for the publisher.
    - **Enable Public API/Feed**: Select to allow approved content to be fetched without authentication. This feature is primarily used for AJAX support. For more information, see Feed.
    - **Enable CORS for Feed API**: Select to allow cross-origin resource sharing. Allows this Feed API to be used on domains other than app.compendium.com. For more information, see Feed.
    - **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

Your generic / offline publisher was added. If you are importing data from Wordpress, see Importing data from Wordpress for more information.

> **Important**: If your license is configured for multiple Business Units, navigate to **Plan** > **Business Units** and enable the publisher for the applicable Business Units.

2.11.3 Adding an External Connection publisher (Push API Integration)

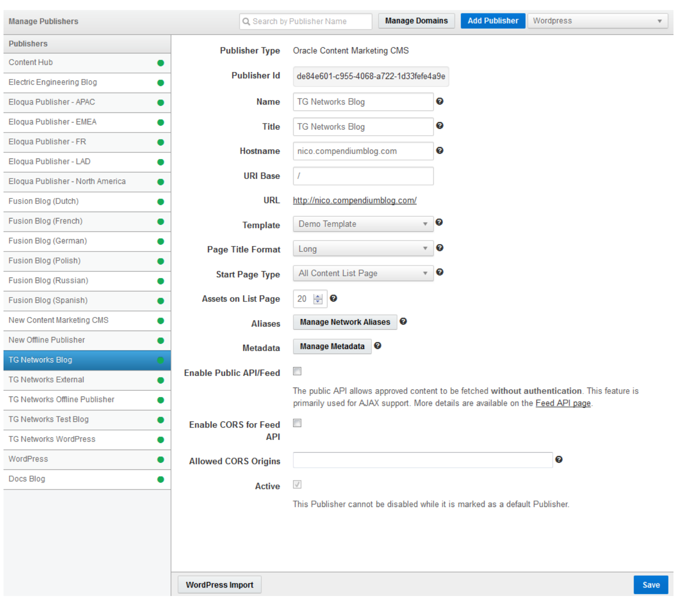
An External Connection publisher (Push API Integration) allows you to listen for and receive events from OCM whenever a content asset is changed. To configure an OCM push API integration, a customer simply enters a Callback URL to their listening server or an AppCloud Partner's listening server. Every time a content asset is updated or changes its workflow state, OCM will "ping" the supplied URL with the latest version of the content asset. This ping will contain the content title, body, metadata, author data, workflow state, and all other information related to the content asset.

The listening server can optionally send OCM the Published URL for the content asset as a response to a ping. If a Published URL is provided, OCM's promotion and content analytics can be used for the content asset. If not, content analytics can still be utilized, but it requires additional API calls to notify OCM of asset views, asset downloads, and conversion events.

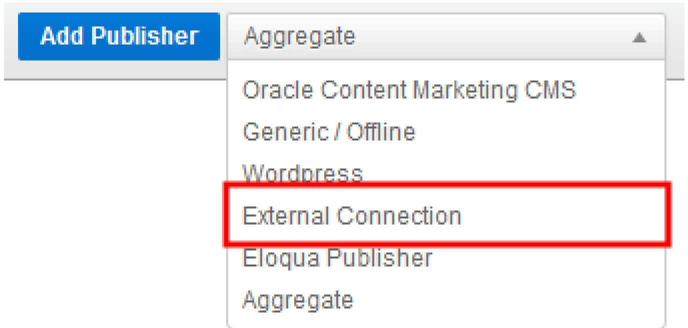
Setting up an integration and configuring an External Connection publisher to leverage the Push API will require either development resources or working with an Oracle Marketing Cloud partner. Oracle Content Marketing does not build or support the development of API-based projects beyond providing API documentation.

To add an External Connection publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click the drop-down list and select **External Connection**.



3. Click **Add Publisher**.

4. Complete the fields as required.

    - **Name**: Enter a unique name for the publisher.
    - **Callback URL**: Enter a Callback URL to your listening server or an AppCloud Partner's listening server. Every time a content asset is updated or changes its workflow state, OCM will "ping" the supplied URL with the latest version of the content asset. This ping will contain the content title, body, metadata, author data, workflow state, and all other information related to the content asset. For more information, see External Connection Publisher.
    - **API Key**: A read-only field displaying the API key that is used to sign each notification request so its authenticity can be verified by the third party.
    - **Analytics Script**: A read-only field displaying the tracking script that should be included on the final page to enable Oracle Content Marketing Analytics Tracking.
    - **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

Your external connection publisher was added. If you are importing data from Wordpress, see Importing data from Wordpress for more information.

2.11.4 Adding a Wordpress publisher

A Wordpress publisher allows you to publish to your Wordpress site. The integration with Wordpress requires you to install a single Wordpress plugin and provides a seamless integration for pushing content into Wordpress.

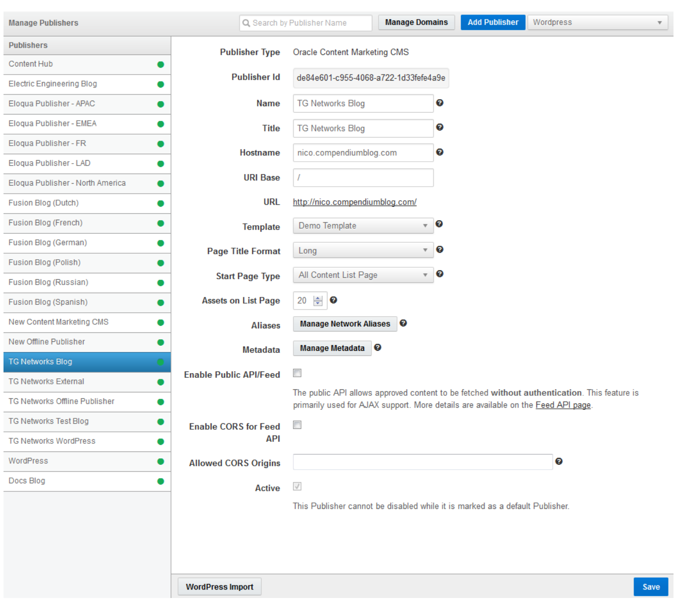
After a Wordpress publisher has been added, you can also import content from Wordpress into any other Publisher.

To learn more about the Wordpress import, or if you have not already set up your Wordpress integration, see Integrating with Wordpress.

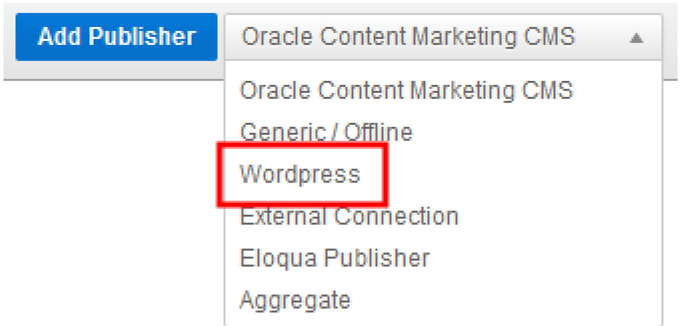
Note: The Content Marketing publisher integration with Wordpress does not work with Wordpress**.com** hosted websites. The Content Marketing integration only works with self -hosted installs of the Wordpress software available from Wordpress**.org**.

To add a Wordpress publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.

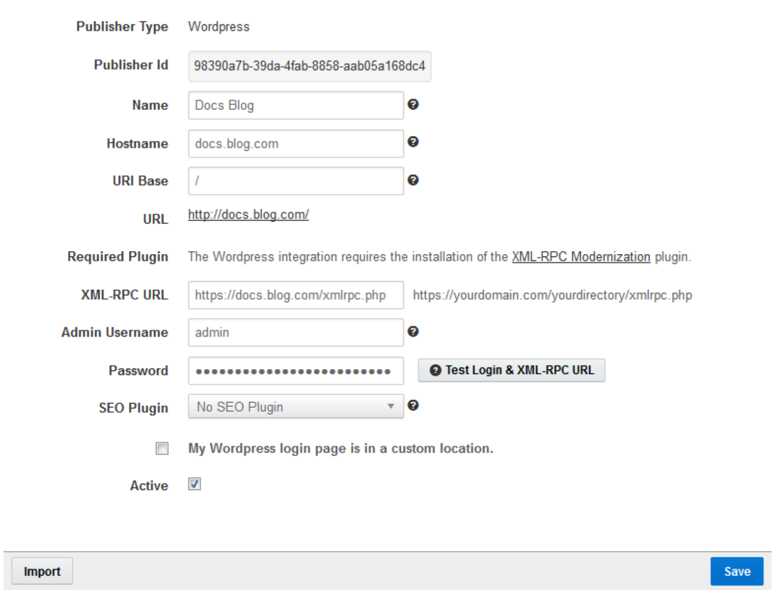


2. Click the drop-down list and select **Wordpress**.



3. Click **Add Publisher**.

4. Complete the fields as required.



- **Name**: Enter a unique name for the publisher.
- **Hostname**: Enter the host name of your Wordpress site.
- **URI Base**: Enter the base path of your Wordpress site.
- **URL**: The composed URL for your Wordpress site as entered in the Hostname and URI base fields displays here. Review for accuracy and modify the respective fields as necessary.
- **XML-RPC URL**: Enter the Wordpress XML-RPC URL. The XML-RPC API library (xmlrpc.php)

is automatically included with each install of Wordpress and is typically located in the root folder of a standard Wordpress install. Check with the technical administrator for your website to confirm this URL.

Note: The XML-RPC URL is not the URL to where the XML-RPC Modernization plugin is located within your install of Wordpress.

The XML-RPC URL entered must be a fully qualified URL including the "http://".

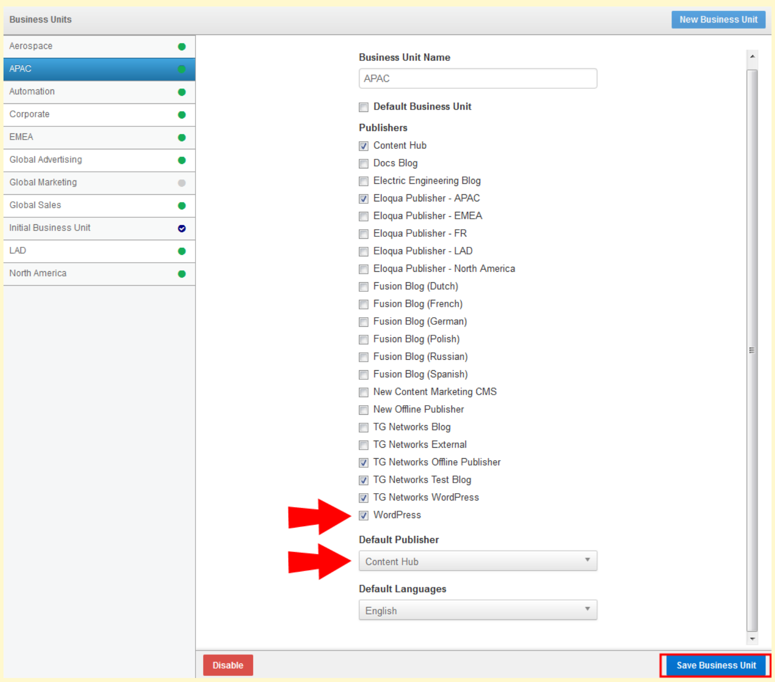
Example: The syntax is: http://yourdomain.com/yourdirectory/xmlrpc.php. If my domain was http://compendium.com/blog, my XML-RPC URL would be: http://compendium.com/blog/xmlrpc.php.

- **Admin Username**: Select a username and password for a user within Wordpress that also has a role set to Administrator. Select the appropriate user within Wordpress that will serve as a default author for any posts created within Oracle Content Marketing without a selected author.
- **Password**: Enter the Wordpress administrator user's password.
- **Test Login & XML-RPC URL**: Click to test logging in with the provided Wordpress credentials and XML-RPC URL. This button will verify if your Wordpress configuration is successful. If you are unable to successfully complete the integration, see Troubleshooting Wordpress Integration.
- **SEO Plugin**: Click to select the SEO plugin your Wordpress site is using. Enabling this functionality enables you to send metadata such as page titles and meta descriptions with your content to specific SEO plugins in Wordpress. For more information, see Integrating SEO plugins.
- **My Wordpress login page is in a custom location**: Select to specify that your Wordpress site has a custom login URL. Enter the login URL into the text box.
- **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

A Wordpress publisher was added. We recommend clicking **Test Login & XML-RPC URL** to verify that your Wordpress publisher configuration was successful.

Important: If your license is configured for multiple Business Units, navigate to **Plan** > **Business Units** and enable the publisher for the applicable Business Units. Under **Publishers**, select the newly created publisher you wish to enable and click **Save Business Unit**.



After a publisher has been added it will display as an option to select when authoring content.

2.11.5 Adding an Eloqua publisher

An Eloqua publisher allows marketers to automatically push content to Eloqua once it has been approved through workflow. This functionality differs from the Eloqua promotion integration which creates a packaged up promotion to a piece of content published on a content hub. The Eloqua publisher pushes the full, unmodified body of a content asset into the *Shared Content* folder within Eloqua.

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Learn more by watching the video

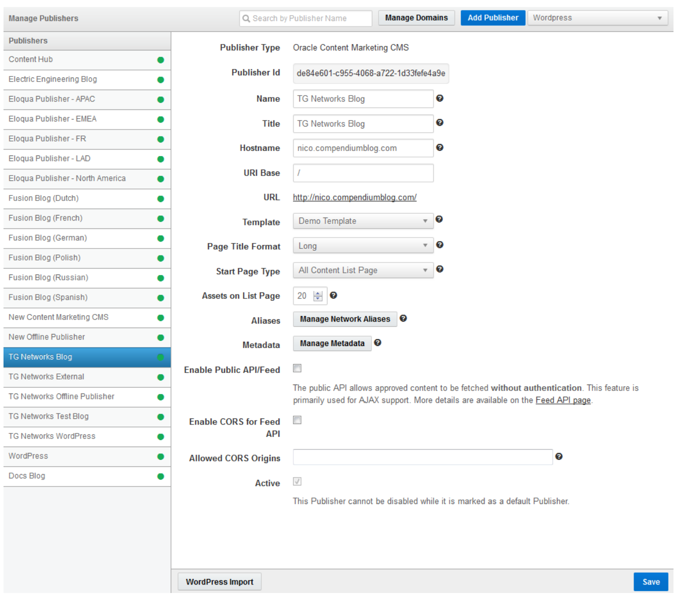
Prerequisites

- An Eloqua linked account

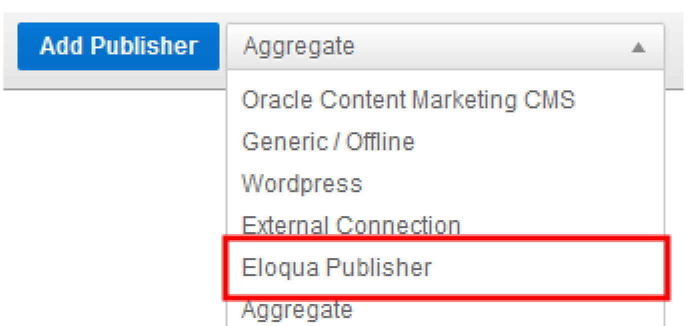
Tip: How your organization governs the usage of folders within Shared Content inside of Eloqua will influence your configuration of this publisher. If you have explicit governance of folder structures by a limited number of individuals you may want the same users to manage the administrator and folder selection of the publisher within Content Marketing. If governance of folders are less strict you may want to allow a greater range of users the option to manage publishers and the option to create folders directly from within Content Marketing.

To add an Eloqua publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.

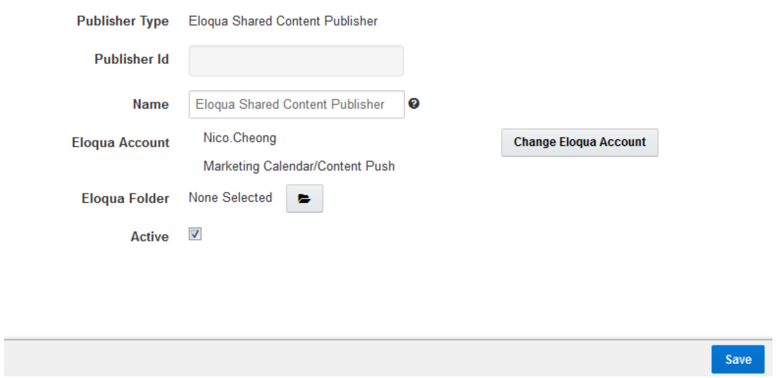


2. Click the drop-down list and select **Eloqua Publisher**.



3. Click **Add Publisher**.

4. Complete the fields as required.



- **Name**: Enter a descriptive name for the publisher.
- **Eloqua Account**: Displays the Eloqua linked account for this Eloqua publisher. Click **Change Eloqua Account** to select a different Eloqua linked account to associate to the Eloqua publisher.

  Note: If the user only has one Eloqua linked account, the publisher will automatically use that linked account. You must add another account to be able to choose which account is associated with the publisher.

- **Eloqua Folder**: Displays the Shared Content folder in Eloqua where assets will be published. Click the folder icon to view the existing folder structure within Eloqua, and select the appropriate folder to store published content. To modify or add folders to use in publishing to Eloqua, login to your Eloqua instance to manage the folders within Shared Content.
- **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

Your Eloqua publisher was saved. See Publishing content to Eloqua for more information on using the new publisher.

Important: If your license is configured for multiple Business Units, navigate to **Plan** > **Business Units** and enable the publisher for the applicable Business Units.

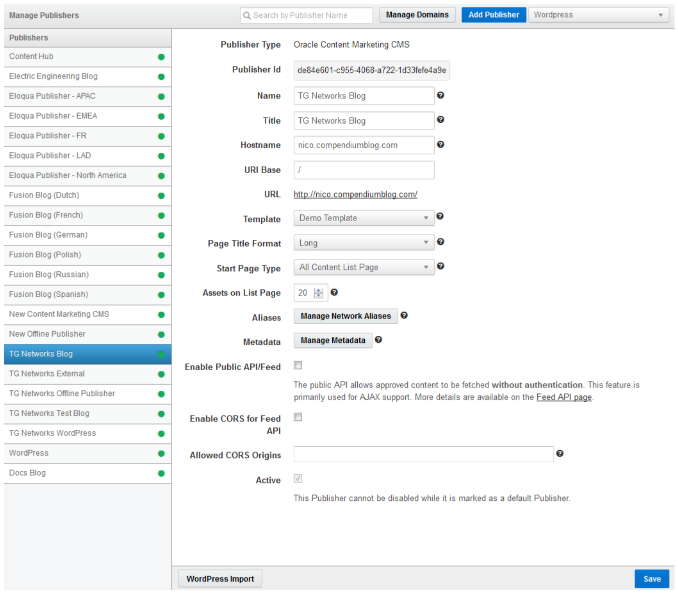
2.11.6 Adding an Aggregate publisher

An Aggregate publisher is used to compile content from multiple publishers into one location. Content published using a Content Marketing CMS or Wordpress publisher will be automatically aggregated using the Aggregate publisher. All other publishers are excluded.

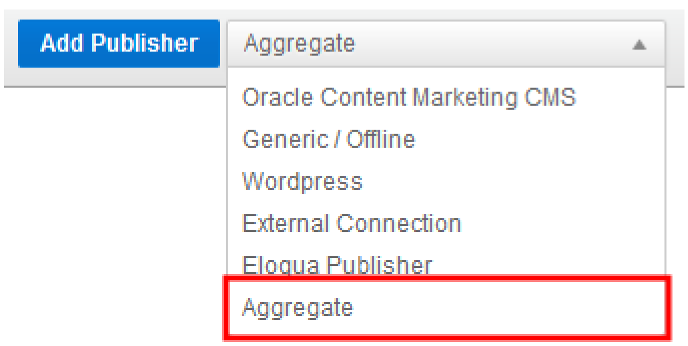
Setting up an integration and configuring an Aggregate publisher to leverage the Feed API will require either development resources or working with an Oracle Marketing Cloud partner. Oracle Content Marketing does not build or support the development of API-based projects beyond providing API documentation.

To add an Aggregate publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click the drop-down list and select **Aggregate**.



3. Click **Add Publisher**.

4. Complete the fields as required.

   - **Name**: Enter a unique name for the publisher.
   - **Title**: Enter a title for the publisher. This field is optional and is used externally in the native Oracle Content Marketing Aggregate Publisher and via the API. It is also used in the web page title tag that web visitors see in the browser tab.

- **Hostname**: Enter a hostname. For this use case, the hostname must have a CNAME DNS record pointed to www.compendiumblog.com.
- **URI Base**: Enter a URI base. The URI base is a string of characters that will be appended to your URL. Each URI base must be unique, the publisher configuration will prevent users from creating multiple publishers with the same URI base.
- **URL**: A read-only field displaying the URL of your publisher.
- **Template**: Click the drop-down list to select a template. If no templates appear, you must create a template in the Template Editor. See Content Hubs for more information.
- **Page Title Format**: Click the drop-down list to select a page title format. A page title will be automatically generated with data from your asset. The options are:
  - **Short**: The short page title format is "**{Asset title} | {Publisher title}**".
  - **Long**: The long format is "**{Asset title}-{Author blog title} | {Publisher title}**".

  The page title can be overridden by editing the content asset directly (click the **Advanced** tab and enter the title in the **Title Tag** field).
- **Start Page Type**: Click the drop-down list to select which format is used to load content assets by default on the homepage. The options are:
  - **All Content List Page**: Loads the most recent assets.
  - **Category List Page**: Loads recent assets for a specific category.
- **Category ID**: Enter the category ID for the assets you want to load on the homepage.
- **Assets on List Page**: Enter the amount of assets you want to load on category and author blog pages.
- **Active**: Toggles whether the publisher is enabled or not.

5. Click **Save**.

Your aggregate publisher was added.

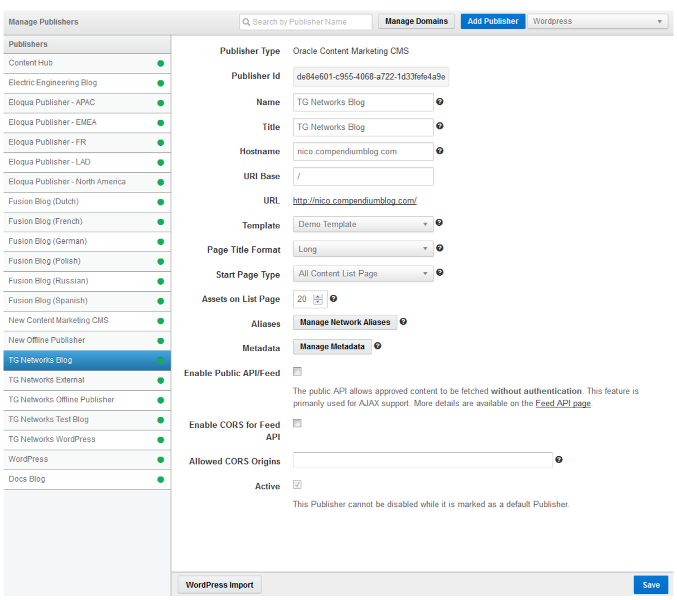
2.11.7 Adding Network Domains

Create network domains to host your content. Domain names must be unique within your Oracle Content Marketing instance. Sub-domains are validated by higher domains. For example, if you add "yahoo.com" as a domain, you can still add "blog.yahoo.com" as a publisher.

If you attempt to create a Content Marketing publisher, but haven't added the domain name first in Manage Domains, that domain name won't be available to be used in the **Hostname** field. Once you have added a network domain, you can enter the domain name when adding a Content Marketing CMS publisher.

To add a network domain:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click **Manage Domains**.

3. Enter a name for the new network domain and click **Add Domain**.

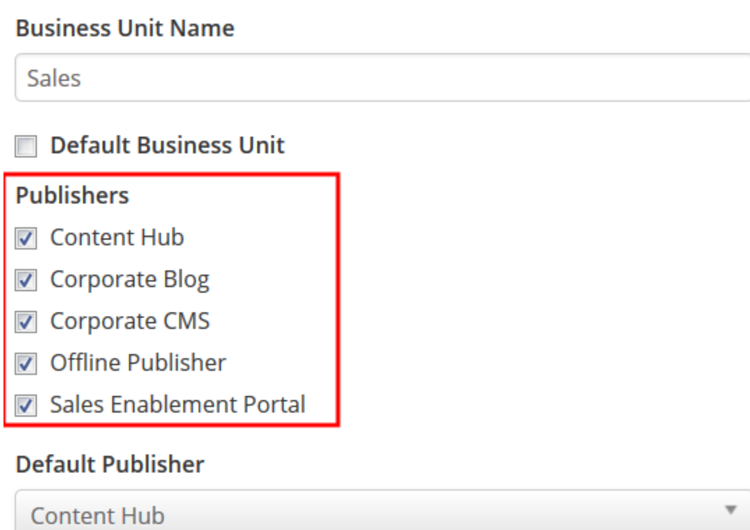
The network domain was added. You can now use this domain when you add publishers.

2.11.8 Changing the default publisher

Every license of Content Marketing must have one default publisher, and only one publisher can be set to the default publisher at a given time. In licenses that only have one configured publisher, that publisher is automatically set to default. If your instance contains multiple Business Units, you have the option to configure the default publisher differently for each Business Unit. When selecting which publisher should be set to default, consider which publisher a team will be publishing to most often.

To change the default publisher:

1. Navigate to **Settings** > **Business Units**.
2. Select a Business Unit to modify.
3. Select the Publishers you want this Business Unit to be able to publish to.



4. Click the **Default Publisher** drop-down list and select a Publisher this Business Unit will

publish to most often.

5. Click **Save Business Unit**.

Your changes were saved.

Publishers cannot be deleted, only set to inactive. A publisher can only be set to inactive once it is no longer enabled for any Business Units. An inactive publisher will be removed from the list of publishers displayed in the **Publish To** menu in the content editor. Default publishers can only be set to inactive once another publisher is set to default.

2.12 Apps

Oracle Content Marketing apps allow marketers to integrate Content Marketing with other software solutions to extend the capabilities to plan, produce, and distribute content.

2.12.1 Available apps

- Brightcove
- Cloudwords
- Dynamic Content
- GaggleAMP
- Lionbridge app
- Oracle Marketing Calendar

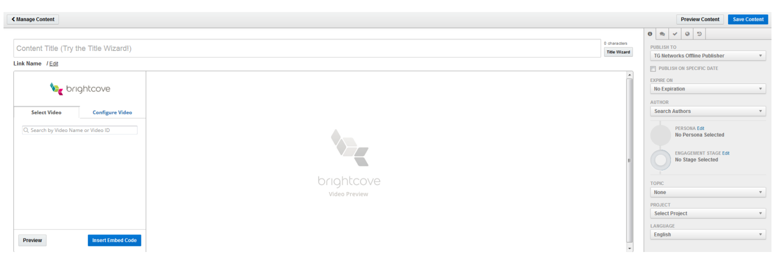
View Integrations for a list of other applications that are natively integrated within the Content Marketing solution.

2.12.2 Brightcove app

The integration with Brightcove allows users to discover and embed videos into content assets within Content Marketing. The integration with Brightcove helps marketing teams support the following use cases:

- Marketing agencies, contractors, and employees can use collaboration tools and workflow to approve video used in assets published to the web, that can be shared across business units
- Proofing capabilities for non-marketing team members to review video and text as they will appear prior to publishing
- Video integrated into key marketing planning tools like the Editorial Calendar and storage in a single Content Library

The Brightcove UI is deeply integrated into Content Marketing, with a familiar experience for including videos in the content production process.



Configuring the Brightcove app

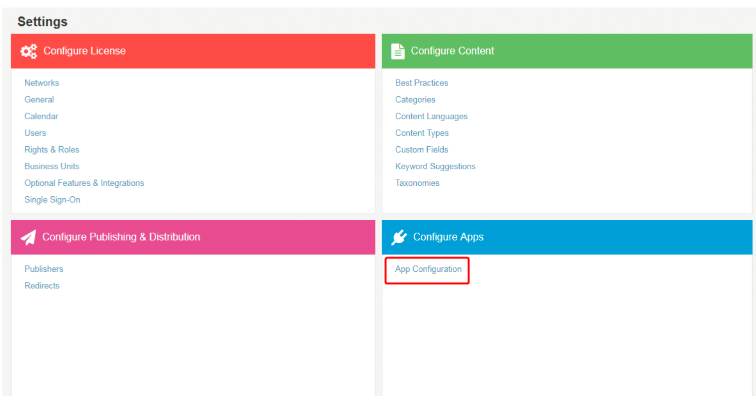
In order to use the Brightcove app in Oracle Content Marketing, it must first be configured. Let's look at how to configure the app and how users can use Brightcove within their license of Content Marketing.

Requirements

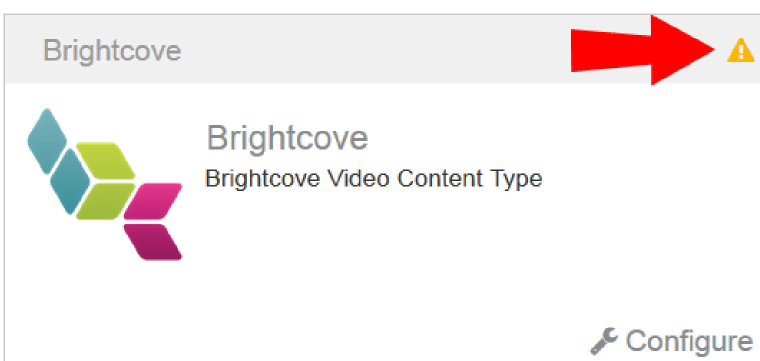
- The app must be installed on the license. See the Feature Availability document for availability information for your license. Installation is performed by a Super Admin. If your license is eligible to have the app installed, work with your account representative to submit a service request through My Oracle Support.
- To configure the app, the user must have the **Manage App Configuration** right enabled. See Rights & Roles.

To access the Brightcove App in Content Marketing:

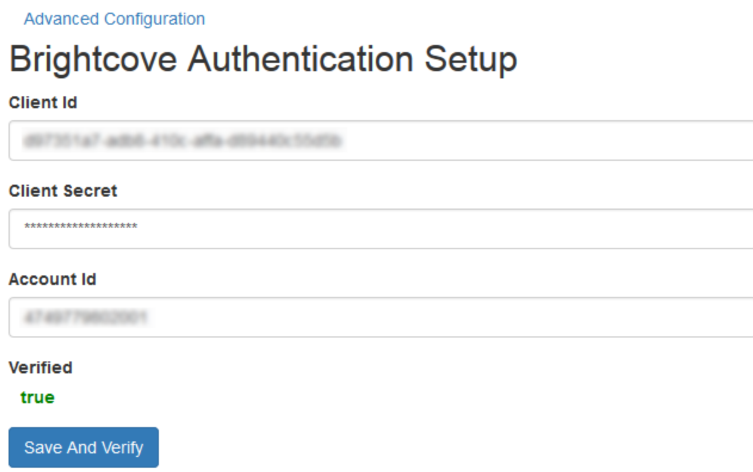
1. Navigate to **Settings** > **App Configuration**.



2. You will be taken to the *Apps* screen, where all apps available to be configured for the license will be displayed. Apps that have not yet been configured will display a yellow warning icon. Click **Configure** to configure the Brightcove app.



3. The *Brightcove Configuration* screen opens with the fields required for configuration. These fields are Client ID, Client Secret, and Account ID.



To obtain the necessary information from your Brightcove license:

Now that you know where to configure your Brightcove App, let's look at where to gather the keys that are needed to perform the configuration. The following instructions will help you work with your Brightcove administrator to gather the right information to correctly setup the app.

When making a request to your admin to setup the app, you will be requesting the admin email the following information:

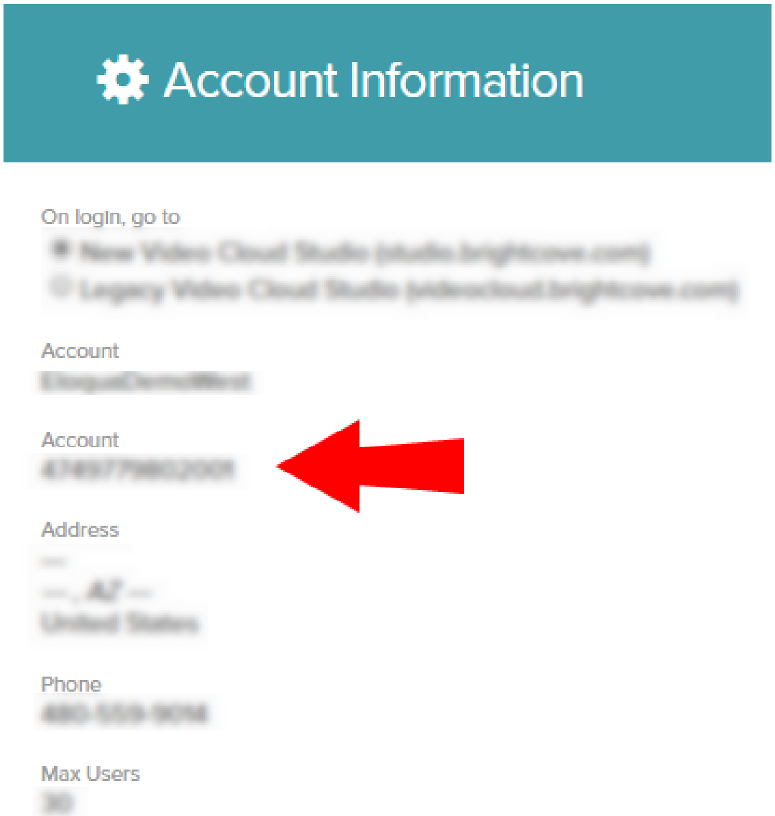
- Account ID - An approx. 13 integer ID
- Client ID - Long string of characters and integers
- Client Secret - Long string of characters and integers

When sending the email to your administrator, you will want to supply the following information. Read through the following instructions for additional context on their usage:

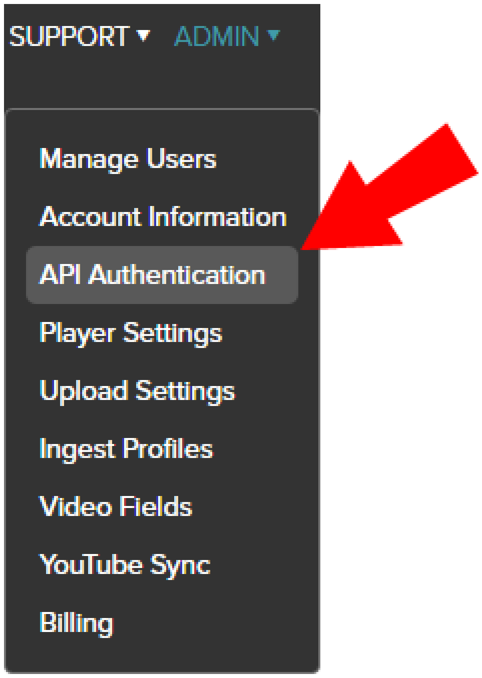
- Register New App
- Name
- Short Description
- Account Name
- App Rights

Tip: A step in the configuration process requires the Brightcove administrator to register a new app to get the key for the Client ID and Client Secret fields. When registering a new app in Brightcove, the Client Secret key will only display once, and cannot be procured again if the key is not properly copied. Where possible to reduce any mistakes in copying the needed keys, sit with your Brightcove administrator when walking through the configuration process.

1. **Account ID**: To obtain the Account ID within Brightcove, navigate to **Admin** > **Account Information**. The Account ID is the integer key listed under ‘Account’. Copy and paste this key into the Account ID field within Content Marketing.



2. **Client ID, Client Secret**: To locate your Client ID and Client secret, navigate to **Admin** > **API Authentication**.



3. Once in the API Authentication screen, select **Register New Application**. You will be prompted to register your application to obtain the necessary credentials in order to call the Brightcove APIs.

4. Enter a name and a short description for the app.

> **Tip**: Provide a clear name and description for the app so that an admin can come back at any time and know the purpose the app serves. The best practice would be to suggest a title and description for your app that is emailed with your instructions to the Brightcove admin.

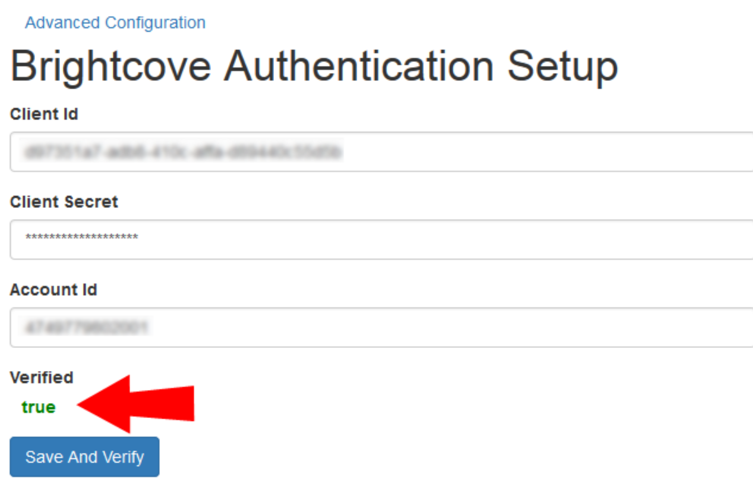
5. From the list of 'Available Account' select and add the appropriate account for to authorize for the app.

6. For API permissions, under CMS, Select **Video Read** and **Video Read/Write**. Under Players, select **Read** and **Read/Write**.

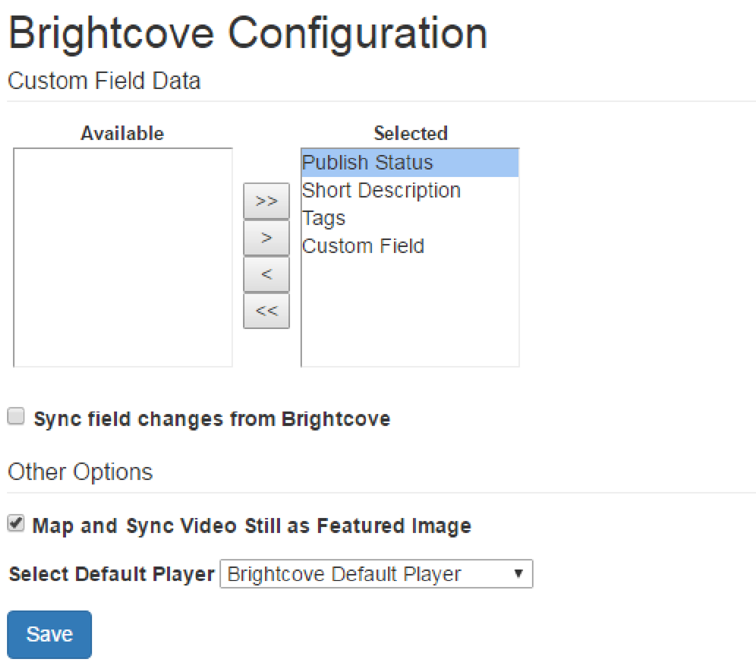
7. You can now click **Save** to register your new app. After saving the newly registered app, the Client ID and Client Secret will appear.

> **Reminder**: This is the only time the Client Secret key will be available, make sure to correctly copy this key.

8. Copy and paste them into the *Brightcove Configuration* screen within Oracle Content Marketing and click **Save and Verify**. The verified field should display as *true*.



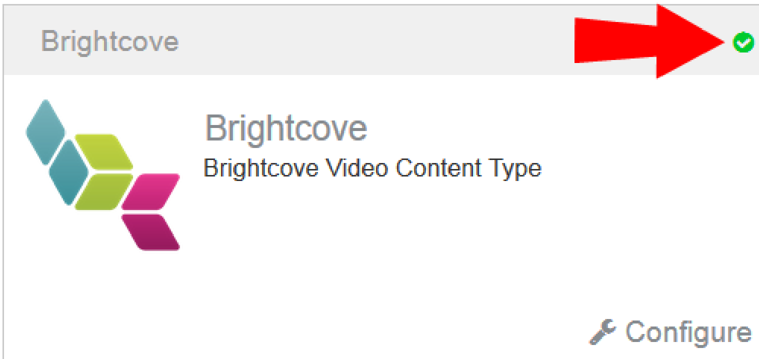
9. Click **Advanced Configuration**, and review the configuration options for this app.



- **Custom Field Data**: Your Brightcove fields will display in the *Available* column. Move the fields that you want synced on assets within Content Marketing into the *Selected* column.
- **Sync field changes from Brightcove**: If enabled, any changes to your fields in Brightcove will be automatically propagated to the custom fields in Content Marketing.
- **Map and Sync Video Still as Featured Image**: If enabled, Brightcove allows users to map Video Stills as the featured image on a content asset and sync any changes to Video Stills automatically. Featured images can be pulled from an asset to use as the best image to draw a click when spotlighting a published asset. There are pre-built places in the app where Featured Images are used, one example is when publishing content to Wordpress.
- **Select Default Player**: Set the *default* player that should be preselected from the list of available players when a user is embedding Brightcove video in Content Marketing.

10. With both Basic and Advanced configuration options reviewed, click **Save** to finish your app configuration.

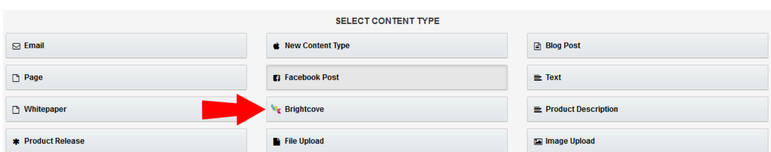
11. In the Apps screen, the Brightcove app will now display a small green check mark in the upper right corner, indicating the app has been successfully configured.



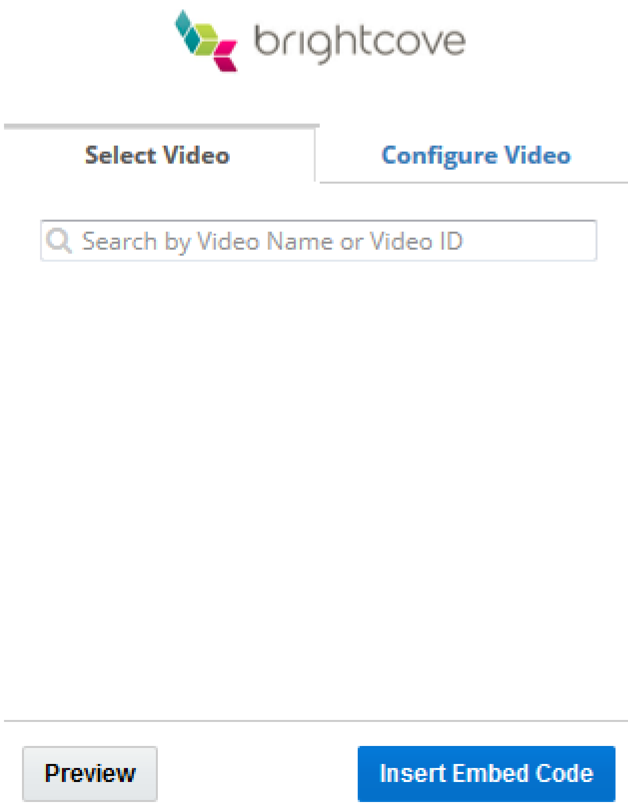
Using the Brightcove app

After your app has been configured, you can create a new piece of content using video from Brightcove. Let's begin by creating a new content type for Brightcove content using the Brightcove integration.

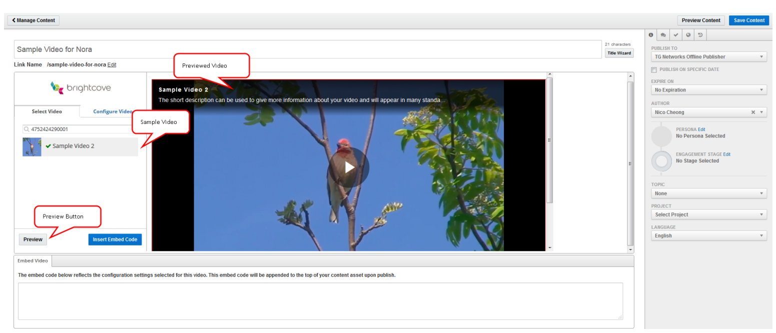
1. Navigate to **Collaboration** > **Create Content**. Inside the content editor, you will see Brightcove listed under *Select Content Type*. Click on the Brightcove icon.



2. The screen defaults to **Select Video**. Search for a video using a query, or if you have a spreadsheet with Brightcove information, input the appropriate Video ID in the search field. A list of videos will display automatically as you type.



3. (Optional) To preview a video and possibly watch a portion, click **Preview**. The video will display in the video preview screen. Once you have found the appropriate video, finalize that selection by choosing the player.

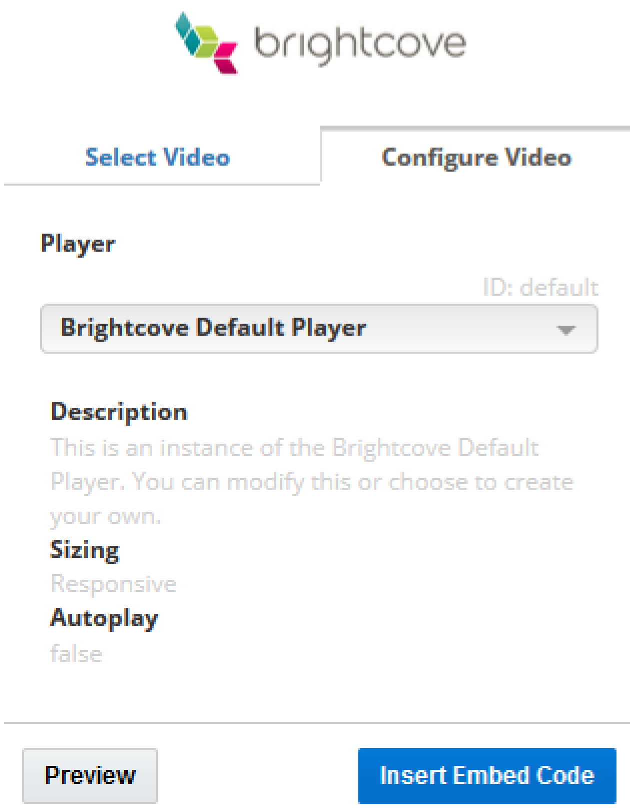


4. Click the **Configure Video** tab.

5. Here you will select the appropriate player to use for your video. From the Player dropdown,

browse the available players - basic information about the player configuration will display below including Description, Sizing, and whether Autoplay is enabled.

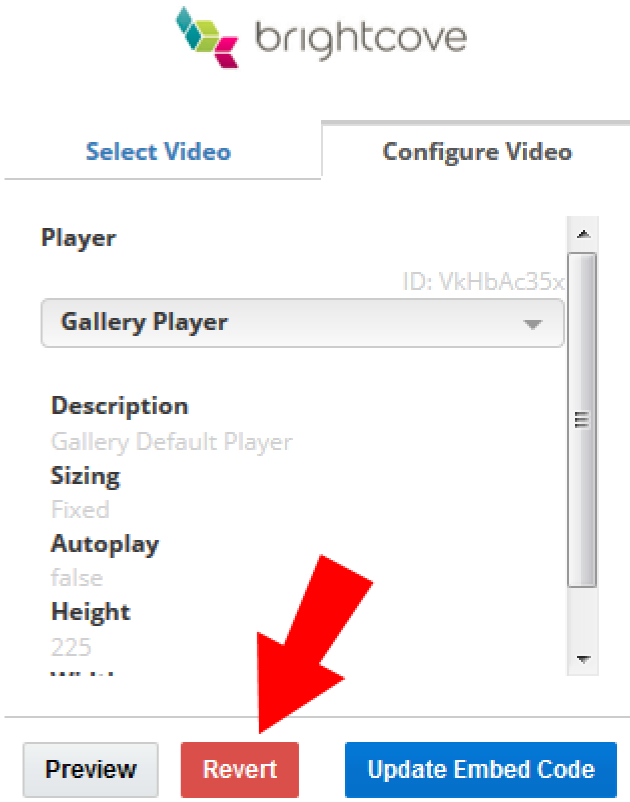
At any time you can click 'Preview' to update the preview of the video using the selected player.



6. Once you've chosen the final video and player, click **Insert Embed Code**.

7. To save your video select **Save Content**.

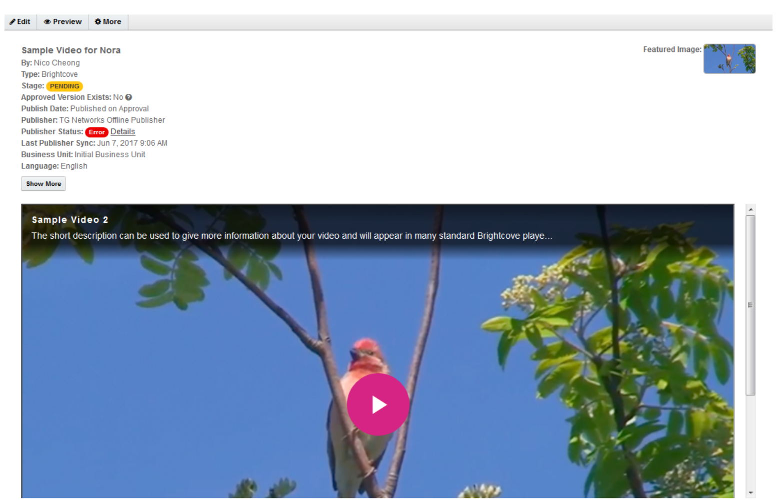
At any time, you can go back and change the video you’ve selected previously using the same process. If the user is trying to find a new video, but decides they will stick with their original selection, a ‘Revert’ button will appear to the right of the ‘Preview’ button to revert the video and player back to their original selection.



Using Brightcove content within the marketing production workflow

Proofing

Users involved in the editorial workflow can review the video by playing it directly from within the Library preview, without having to enter edit mode.



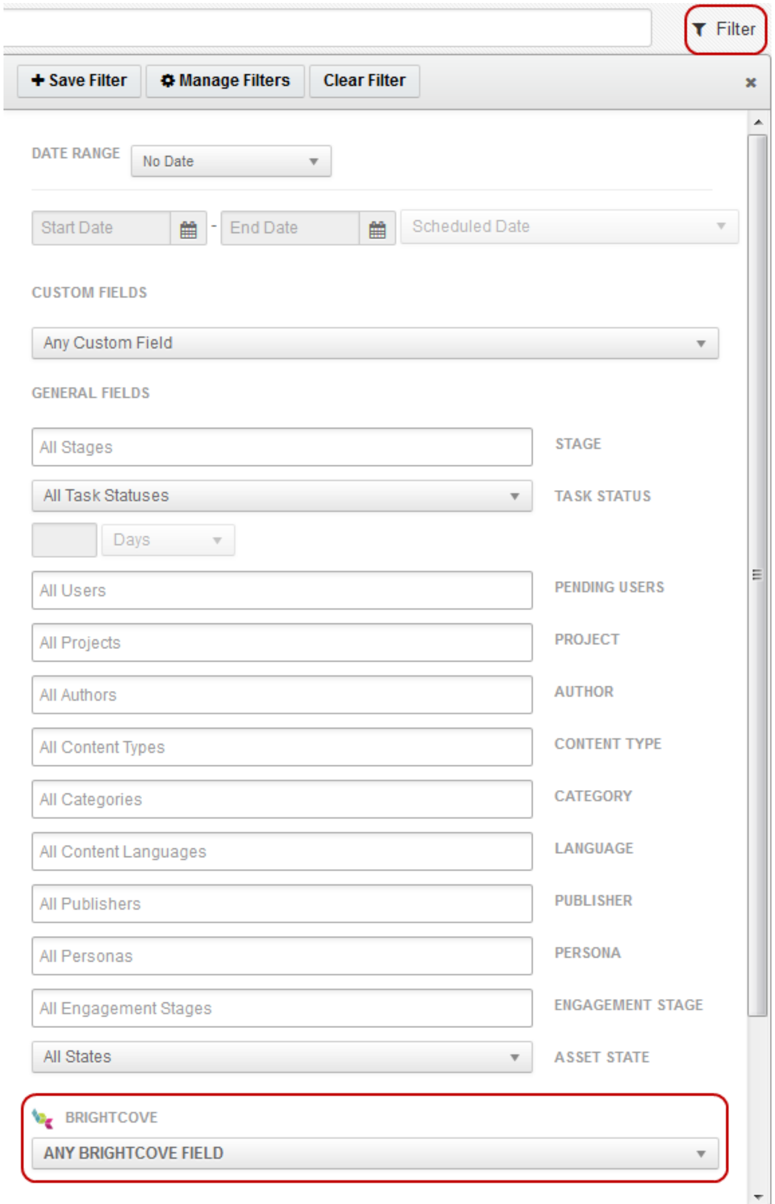
Publishing

Users can can post the asset either to a Content Marketing Content Hub or to Wordpress using our native Wordpress integration.

Searching

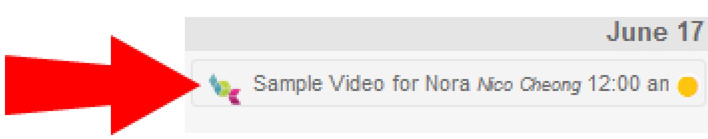
Once your Brightcove content has been created it will appear in the content list. You will see the Brightcove icon to the bottom left of the content asset title.

From the library, users can Filter to see a list of Brightcove specific content types and filter those content types by Brightcove specific field values under the *Custom Field* drop down.



Visibility on the calendar

Users can choose to publish content on a specific date. When you do so, it will appear under that date in the Editorial Calendar. The Brightcove icon will appear next to the content asset title.



2.12.3 Cloudwords app

The Cloudwords app enables marketers to create translation projects to send your content to Cloudwords to be translated. The translation process follows a simple workflow:

1. Users add assets to a new, or existing translation project.
2. The project and all contained assets are sent to Cloudwords.
3. The user manages the vendor selection, bid management process and asset review processes within Cloudwords.
4. The final translated content is automatically sent back to Oracle Content Marketing.

Configuring the Cloudwords app

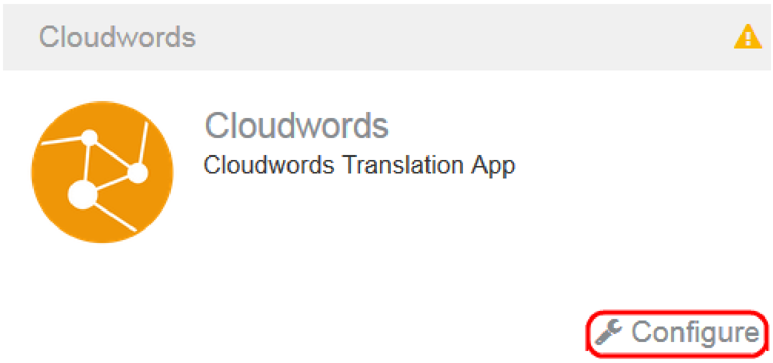
In order to use the Cloudwords app in Oracle Content Marketing, it must first be configured. Let's look at how to configure the app and how users can use Cloudwords within their license of Content Marketing.

Requirements

- The app must be installed on the license. See the Feature Availability document for availability information for your license. Installation is performed by a Super Admin. If your license is eligible to have the app installed, work with your account representative to submit a service request through My Oracle Support.
- The **Manage App Configuration** right within Content Marketing. See Rights & Roles.

To configure the Cloudwords app:

1. Follow these instructions to generate a Cloudwords App Key.
2. In Content Marketing, navigate to **Settings** > **App Configuration**.
3. Find the Cloudwords app and click **Configure**.



4. Enter the Cloudwords App Key from Step 1.
5. For sandbox Cloudwords accounts, select **Use Cloudwords Sandbox API**.
6. Click **Save Settings**.

Creating translation projects in Cloudwords

Create translation projects to send your content to Cloudwords to be translated.

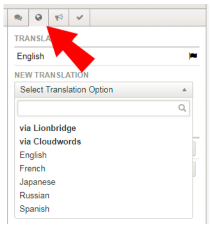
Prerequisites

- A configured Cloudwords app.

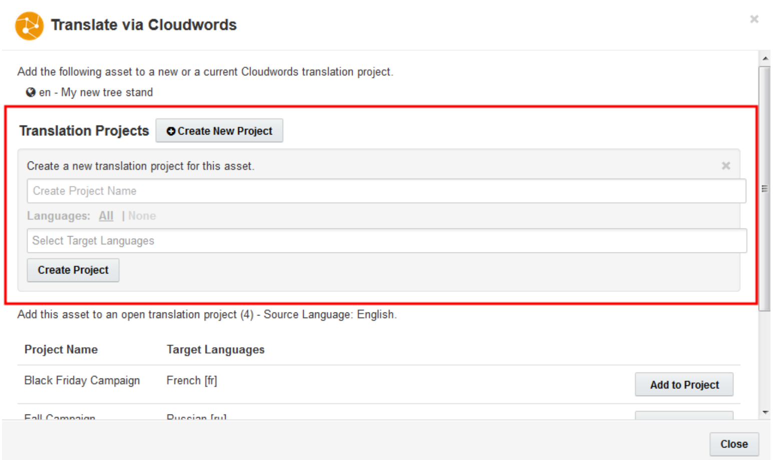
To create a new translation project:

1. Navigate to **Collaboration** > **Library**.
2. In the Content List, select a content asset to send off for translation.
3. Click the **Translate Content** panel.

4. From within the panel under **New Translation**, **Select Translation Option** select **Via Cloudwords**. If you do not see this option, see Troubleshooting translation management.



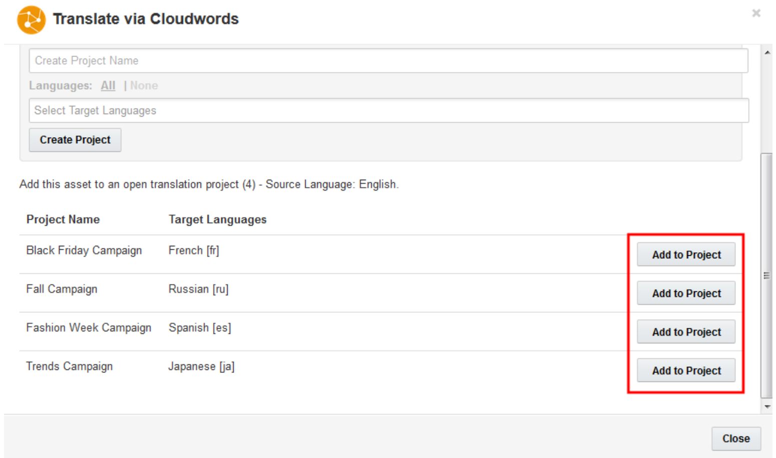
5. Click **Create New Project** and enter the project details.



- **Create Project Name**: Enter a name for the translation project.
- **Select Target Languages**: Select the content languages you want to translate the asset to. You have the option to select all or remove all defined languages added to a project. If you do not see the desired content language, see Adding Content Languages to learn more.

6. Click **Create Project**. Your project will now appear in the list below of all active Cloudwords projects.

7. Find the project you just created, and click **Add to Project** to add the content asset to the new translation project.

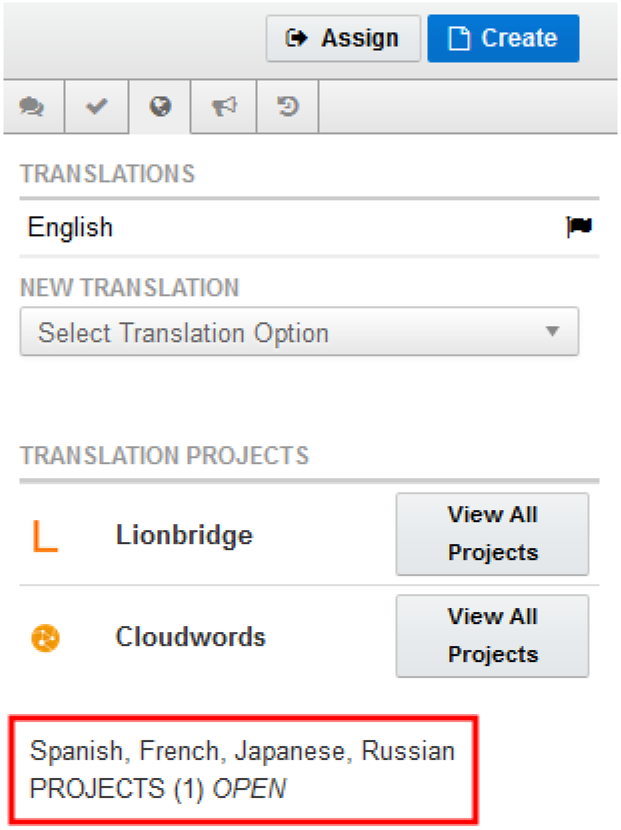


8. A message will appear confirming the save was successful. Once the save is complete, the asset is automatically sent to Cloudwords.

9. Click **Close**.

Now that the asset has been sent to Cloudwords, the user will manage the remainder of the project workflow from within Cloudwords.

You can verify the asset was sent to Cloudwords using the *Translate Content* panel. The *Translate Content* panel will display all active projects where the asset is included. Your newly created translation project will appear, with a status message of “OPEN”.



2.12.4 GaggleAMP

GaggleAMP is a social marketing platform that allows companies to build advocate networks of employees, customers and / or vendors to amplify their marketing messages for more traffic, leads and social media interactions. Marketers can leverage GaggleAMP within their Oracle Content Marketing solution to make content assets available within GaggleAMP for promotion.

Content assets are promoted to GaggleAMP as a message suggestion. Once promoted successfully, the suggested message is managed within GaggleAMP.

Note: This feature must be enabled by an Administrator in the License Configuration menu.

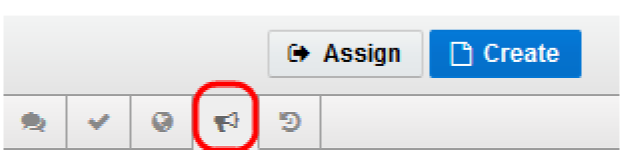
Promoting content via GaggleAMP

You can promote content assets to GaggleAMP to send your content to a Gaggle. Gaggles are communities of users who are provided a set of pre-packaged, suggested messages to share to their social media accounts. This allows multiple users to partake in a company's online marketing activities, by sharing your brand's pre-packaged messages to the social networks of users. GaggleAMP enables your content to be shared by anyone within a Gaggle, which can include a marketing company's employees, or any other member within the Gaggle.

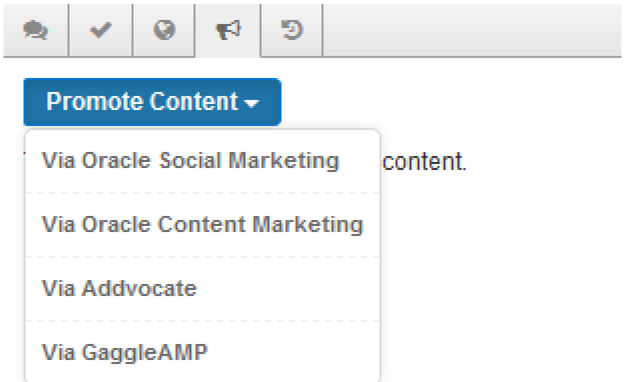
Note: This feature must be enabled by an Administrator in the License Configuration menu.

To promote an asset to GaggleAMP:

1. Navigate to **Collaboration** > **Library**.
2. Click the **Promote** tab.

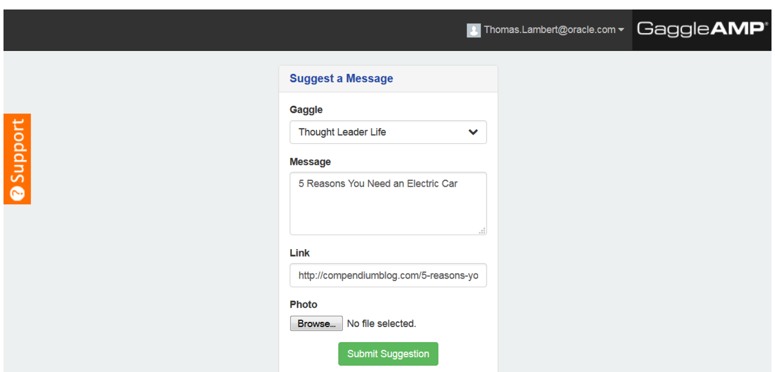


3. Click **Promote Content** > **Via GaggleAMP**.



4. You will be prompted with a login screen for GaggleAMP. Enter your credentials and click **Sign In**.

5. A Gaggle window opens to configure your Gaggle message.

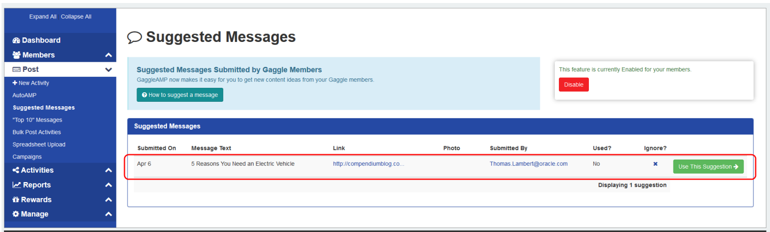


Configure the message:

- **Gaggle**: Select the Gaggle to use to promote the message.
- **Message**: Enter a customized Gaggle message. By default, the content asset title will be entered in GaggleAMP as the Gaggle message.
- **Link**: The URL for the published asset will be displayed.
- **Photo**: Select a photo for the message.

6. Click **Submit Suggestion**.

Your message suggestion is sent to the Gaggle within GaggleAMP.



2.12.5 Lionbridge app

Create translation projects to send your content to Lionbridge to be translated, powered by Lionbridge's Clay Tablet connector.

Marketers can send content to be translated to the following Lionbridge systems supported by the Clay Tablet connector:

1. Freeway
2. onDemand

The translation process follows a simple workflow:

1. Users add assets to a new, or existing translation project.
2. The project and all contained assets are submitted to Lionbridge.
3. Projects (the equivalent item in Lionbridge technology may be referred to as Jobs or Orders) are reviewed, and quotes requested as necessary in the Translation System.
4. Once the content is finalized in the Translation System, it is automatically sent back to Oracle Content Marketing.

Configuring the Lionbridge app

In order to use the Lionbridge app in Oracle Content Marketing to send content to Lionbridge to be translated, it must first be configured. The configuration process follows:

1. Obtain an API Key from Lionbridge
2. Obtain an Access Token from Lionbridge
3. Configure the Lionbridge app in Content Marketing

Additionally, an administrative user can generate their own access token to begin testing.

Requirements

- The **Manage App Configuration** right within Content Marketing. See Rights & Roles.
- Username and password for an Administrator account of your Lionbridge system that will be used to configure the Lionbridge app.

Obtaining an API Key from Lionbridge

Prior to configuring the app in Content Marketing, you will first need an API Key from Lionbridge. This API Key is needed to obtain an Access Token.

To obtain an API Key:

1. Follow the instructions on the Clay Tablet REST API Getting Started page.
2. An email will be sent to you confirming you can now proceed with the “Obtaining an Access Token” step below.

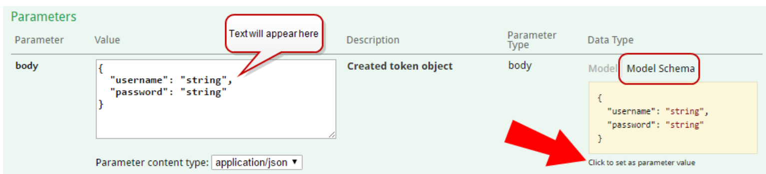
Obtaining an Access Token

To obtain an Access Token:

1. Navigate to the Clay Tablet Developers site at https://developers.clay-tablet.net/.

2. On that website select **API Reference**, click **Token** and click on the **/oauth2/token** endpoint to expand the information.

3. A new section of the screen opens below. Under *Parameters* click the yellow box labeled **Model Schema**. This will automatically populate an example of the code that is needed in the **body** text box on the left, with placeholder text labeled 'string' as each of the values.



4. For **username**, enter your username in place of ‘string’ between the two quotes.

5. For **password**, enter your password in place of ‘string’ between the two quotes.

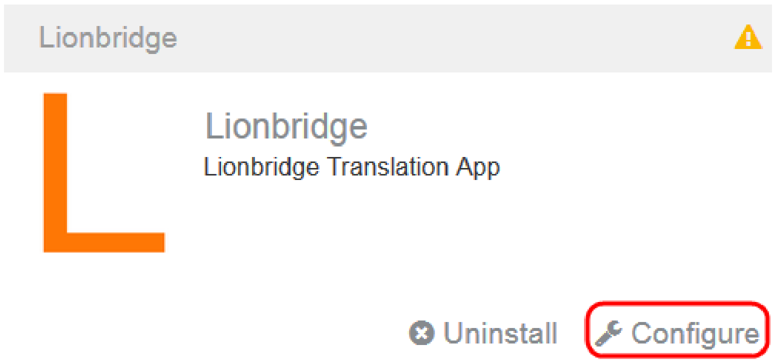
6. Click *Try it out!* and an Access Token will automatically generate under *Response Body*. This is the key that you need to finish the app configuration in Content Marketing.

Configuring the Lionbridge app in Content Marketing

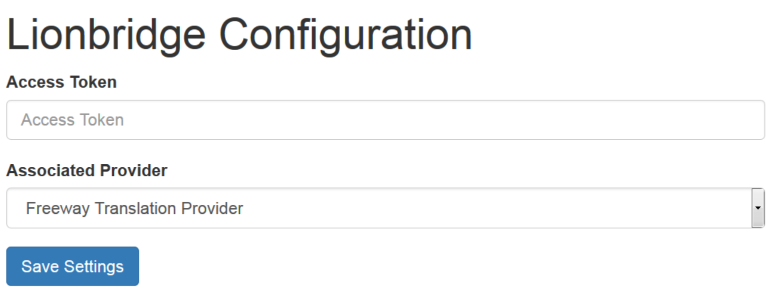
To configure the Lionbridge app:

1. In Content Marketing, navigate to **Settings** > **App Configuration**.

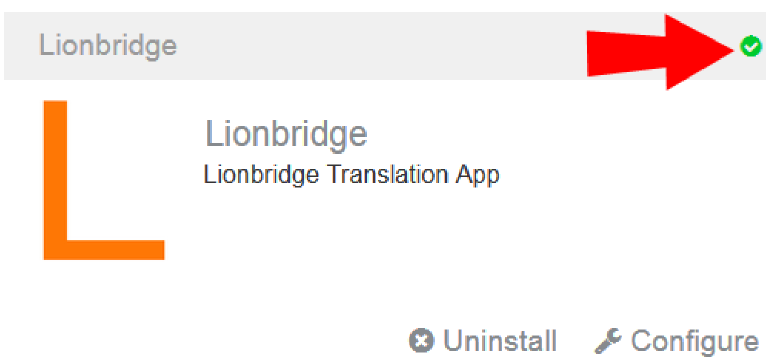
2. Find the Lionbridge app and click **Configure**.



3. Use the Clay Tablet Access Token you obtained in the above steps to configure the Lionbridge app.



4. Click **Save Settings**.



Clay Tablet will automatically understand the credentials supplied to know which Lionbridge platform it should connect to. Your app is now successfully configured and ready for use.

The Lionbridge app makes it easy for marketers to request translated content from any one of Lionbridge's translation tools. When content has been translated, it is automatically sent back to Content Marketing for a final workflow review prior to distribution.

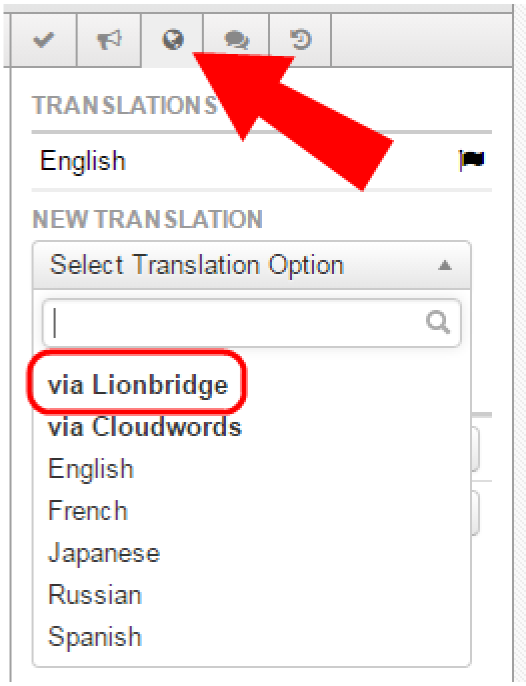
This document will step you through the flow to end to end flow of sending content to Lionbridge.

Prerequisites

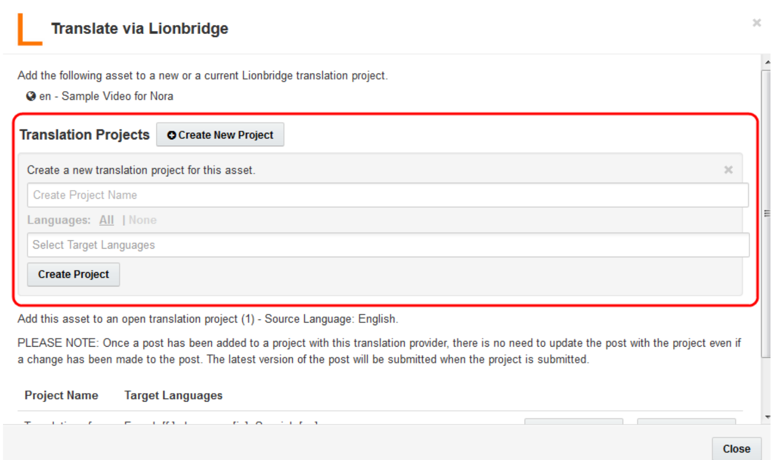
- A configured Lionbridge app.
- Content Languages configured with the correct language codes from Lionbridge. See Content Languages for information on configuration of Content Languages.

To create translations:

1. Navigate to **Collaboration** > **Library**.
2. In the Content List, select the content asset to send off for translation.
3. Click the **Translate Content** panel.
4. From within the panel under **New Translation**, select **Translation Option** > **Via Lionbridge**.



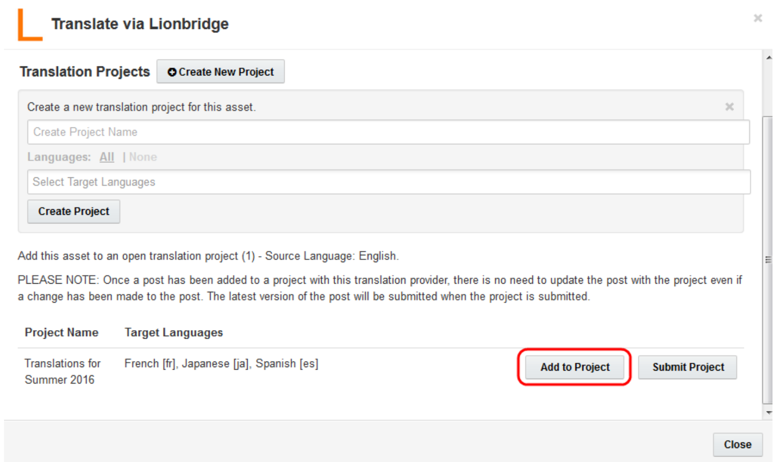
5. Click **Create New Project** and enter the project details.



- **Create Project Name**: Enter a name for the translation project.
- **Select Target Languages**: Select the content languages you want to translate the asset to. You have the option to select all or remove all defined languages added to a project. If you do not see the desired content language, see Content Languages to learn more.

6. Click **Create Project**. Your project will now appear in the list below of all active Lionbridge projects.

7. Find the project you just created and click **Add to Project** to add the content asset to the new translation project.



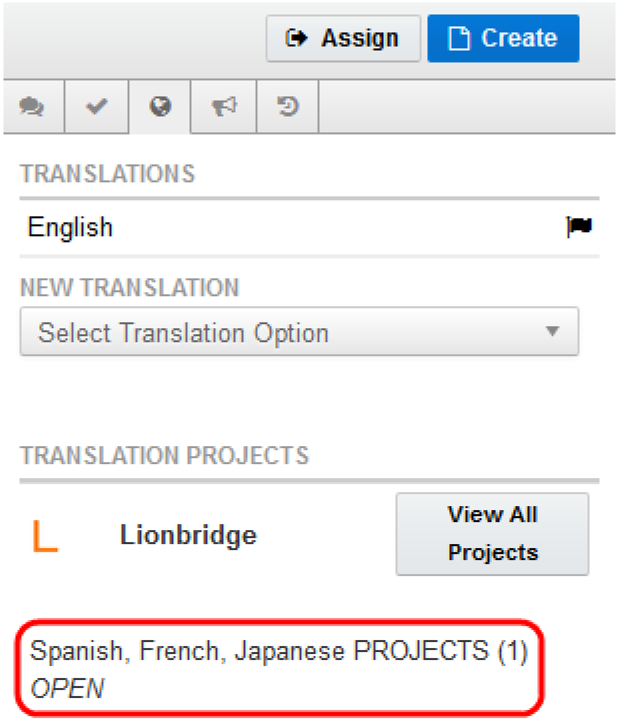
8. A message will appear confirming the asset was successfully added to the project.

9. Once your project contains all assets that will be translated, click **Submit Project** to send the assets through Clay Tablet off to the appropriate Lionbridge application. You must click **Submit Project** to send the project to Lionbridge.

10. To exit out of the modal, click **Close**.

Now that the asset has been sent to Lionbridge, you must manage the remainder of the project workflow from within Lionbridge.

You can verify the asset was sent to Lionbridge using the Translate Content panel. The Translate Content panel will display all active projects where the asset is included. Your newly created translation project will appear, with a status message of “OPEN”.


Assign
Create
TRANSLATIONS
English
NEW TRANSLATION
Select Translation Option
TRANSLATION PROJECTS
Lionbridge
View All Projects
Spanish, French, Japanese PROJECTS (1)
OPEN

3 Frequently asked questions (FAQs)

This section is designed to answer some of the questions most often asked about Content Marketing.

- Browsers
- Calendar
- Content Hubs
- Content Portal
- Custom fields, topics, and categories
- Editor (Create Content)
- Eloqua Integration
- Exporting the Calendar
- Promoting content
- RSS
- Search
- Supported browsers
- Storage of assets and files
- StoryCapture
- Tracking scripts
- Wordpress Integration
- Workflow

3.1 Browsers FAQ

Why am I experiencing issues with Content Marketing in Firefox?

We recommend several approaches to take if you are experiencing issues with the Oracle Content Marketing platform in Firefox that may quickly resolve any difficulties that you are experiencing.

To clear your cache and cookies:

1. Go to Tools within the top navigation bar. Scroll down and select "Clear Recent History."
2. You will then be prompting to select the data that you would like cleared. We recommend always clearing your cache and cookies.

If you're having trouble with your computer, here are three simple things to try before contacting the Oracle Content Marketing Support Team.

To clear your DNS cache:

1. On your computer, open 'Start' and Click 'Run'
2. Type in "ipconfig /flushdns" and click "OK".
3. View step-by-step instructions for additional information at https://support.fluidhosting.com/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=244&nav=0,3,17.

3.2 Calendar FAQs

How far back can I view historical marketing information on the calendar? Are there any retention limits on the data displayed?

There are no limits on viewing historical information on the calendar when that data originated from Content Marketing. For example, there are no retention limits on Custom Entries, Projects, Content Assets or Social Promotions.

Can I export the calendar to PDF to distribute within my organization?

It is possible to generate a PDF of the calendar to distribute internally. The print function is the best practice option to turn a printable view of the calendar into a PDF for internal distribution.

The print option for the calendar will display a maximum of nearly three months of calendar data for a calendar with approx. 2-3 scheduled items per day. As your calendar of scheduled marketing initiatives grow and all of the corresponding items, more PDFs will need to be generated to cover longer periods of time.

3.3 Storage of assets and files FAQs

Is there a limit to the amount of content we can create?

No. There are no limitations to the amount of content created within a license.

Are there any file size upload limitations?

Yes. There are file size limitations on uploading files through the user interface. Attachments uploaded using the interface are limited to 256MB, but there are no file size limitations when pushing attachments into Content Marketing through the API. All files uploaded to Content Marketing are stored on a Content Delivery Network using Akamai.

Note: All files stored on Akamai are publicly accessible.

What types of files can be uploaded to Content Marketing?

Any type of file can be uploaded to Content Marketing through the UI up to 256MB in size. Some file formats will have a preview after upload, some file formats will not. Refer to the list of file types to better understand which formats will have a preview on upload.

Is there a character limit for content creation?

There are no character limits on content authored in the main editor for a content asset.

3.4 Content Hub FAQs

The following are frequently asked questions pertaining to Content Hubs in Oracle Content Marketing.

Can I change my blog domain name?

It is possible to change your blog domain name but Oracle Content Marketing does not recommend it.

Changing your domain will have a negative impact on your blog campaign. It will likely result in the loss of the following:

- Search engine indexing
- Search engine rankings
- RSS subscribers

3.5 Content Portal FAQs

When a user shares a piece of content from the portal using Facebook or LinkedIn - what images are included as options to the user?

When a user clicks the option to share a piece of content using Facebook or LinkedIn, they will be prompted with a sharing modal from AddThis - another Oracle technology. The sharing modal will display images that have been defined in the OpenGraph information from the published URL.

As a generality, social networks will give preference to Open Graph information set on the page in an effort to reduce abuse related to quality of content. There are times where these social networks will parse through a URL and attempt to approximate the Open Graph metadata.

The best way for marketers to govern what images are used by employees sharing content is to ensure that Open Graph information is defined wherever content is published.

For more reading, here is an article from Facebook regarding recent (2017) changes to their API to depreciate the customization of link metadata including images.

https://developers.facebook.com/blog/post/2017/06/27/API-Change-Log-Modifying-Link-Previews/

3.6 Custom Fields, Topics, and Categories FAQs

What are the differences between custom fields, categories, and topics? And when should each be used?

Custom Fields

Custom fields should be used when an organization wants to tag content assets with meta information, to make finding and working with content assets easier. Custom fields allow marketers to assign more than one dimension to a content asset, and provide greater flexibility for organization than attempting to organize assets in a nested folder structure. The three most common usages for adding meta information to content assets are:

- Customizing the content fed into another channel, typically through a custom integration
- Providing advanced search options for marketing and non marketing team members to find content
- Options to measure content across multiple dimensions

A couple of examples of how you might use custom field metadata include:

- Tagging content assets with Brand, Region, Vertical, and Channel information to guide usage and targeting.

- Tagging content assets with tag and keyword information that can be pushed over to Wordpress to customize template presentation.
- Tagging content assets with Product, Solution, and Industry information which can be used to sort views on the marketing calendar.

Topics

As a part of an integrated communications plan, topics of conversation inform the specific messages that drive all content created as a part of a marketing campaign. Once a marketing team has established a topic for content creation, the team will audit the content they have and brainstorm ideas for what content they still need.

Within Content Marketing, users will build out Topic plans within Topics & Idea Planning. Editorial team members will use the Topics & Idea Planning interface to view all content that can be fulfilled, and build the assignment and instructions that will be sent out to authors. Additionally, marketers that have implemented content programs for employee or customer participation can capture any submitted idea and organize them under the appropriate marketing topic. Once a content operation is working at full steam, it is important to have the ability to visualize and save all of the possible ideas that could be fulfilled at a later date.

Categories

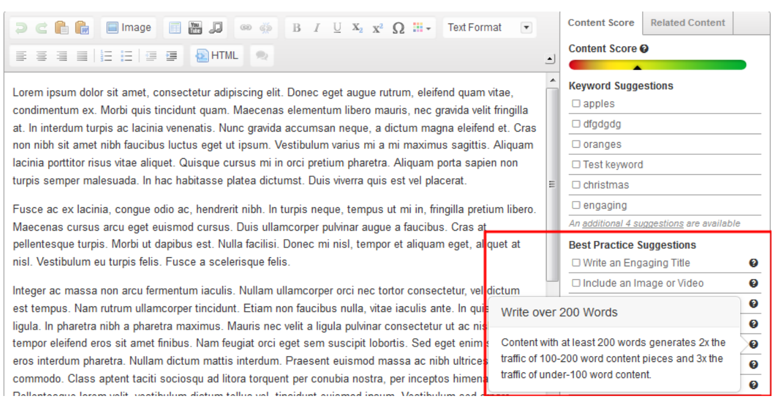
Categories provide organization to your publishing strategy to categorize content based on a theme or concept to which they relate. When you create a post you can manually select the categories in which the topic will appear.

Categories are used to sort and group content into different sections like a table of contents for your website. A website publishing content on a variety of topics can divide their website into sections using categories to make it easy for readers to find content they're interested in. Oracle Content Marketing recommends categories based on a number of criteria:

- Diversity
- Client's desired focus
- Client's goals
- Search volume
- Competition level
- Effectiveness

3.6.1 Adding Best Practice suggestions

Add Best Practice suggestions to suggest content authoring guidelines for authors to follow. Best Practice suggestions can be used in a variety of applications, from best practice style guidelines, to organizational guidelines (brand, legal, regulatory) that are required guidance for authoring content. The titles for each of the Best Practice suggestions are displayed in the Content Score panel, the author can hover each suggestion to view more information.



To add a Best Practice:

1. Navigate to **Settings** > **Best Practices**.
2. Click **New Best Practice**.

3. Complete the fields as appropriate.

    - **Suggestion Title**

      Enter a title for the best practice suggestion.

    - **Description**

      Enter a description for the best practice suggestion.

    - **Business Units**

        - **All Business Units**

          Select to allow all Business Units to access this Best Practice.

        - **Specific Business Units Only**

          Select to limit this Best Practice to specific Business Units. Select the Business Units this Best Practice will be applicable to.

    > **Note**: This option is only available in multi Business Unit licenses.

4. Click **Save Best Practice**.

The Best Practice was added.

3.7 Exporting FAQs

What options do I have for exporting data?

Customers have a couple of options when looking to export their data for use cases around reporting. Export options are available on the calendar and within Analytics.

The calendar will provide a list of all schedule activities on the calendar including content, as well as associated meta information about the entries. For more information, review calendar export.

Within Analytics, customers have the option to export data around the performance of their content assets as well as overall production of assets, including assets that were created over a select period of time. For more information review analytics export.

Can I export the calendar to PDF to distribute within my organization?

It is possible to generate a PDF of the calendar to distribute internally. The print function is the best practice option to turn a printable view of the calendar into a PDF for internal distribution.

The print option for the calendar will display a maximum of nearly three months of calendar data for a calendar with approx. 2-3 scheduled items per day. As your calendar of scheduled marketing initiatives grow and all of the corresponding items, more PDFs will need to be generated to cover longer periods of time.

3.8 Editor FAQs (Create Content)

What is the best way to use HTML authored in another tool?

It is common for marketing teams to use third party tools like Adobe Dreamweaver to create HTML. Some common use cases in authoring marketing content would be to create a specific layout for a banner or ad with text overlays, or the creation of an email that will be brought into Eloqua. The requirements for precise control over the HTML will determine how Editor Types should be configured in your license of Content Marketing.

Why does the content editor remove my HTML markup?

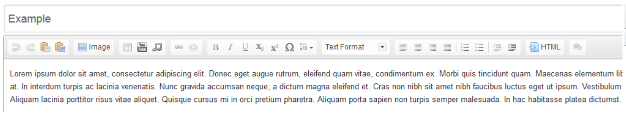
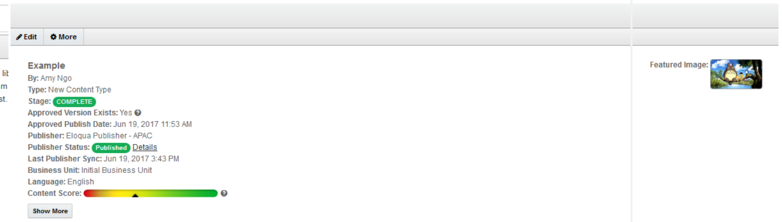
The best practice usage of Content Marketing is to create blocks of content that have been separated from the presentation within one channel tool like a Web CMS or a Marketing Automation Solution. The content editor supports the majority of HTML markup needed to build unique content of an asset. However, the editor does not support HTML tags that are typically used in the surrounding presentational template. The editor will automatically strip the following HTML tags when they are inserted into the editor:

- `html`
- `head`
- `body`
- `doctype`

HTML is flexible to be modified in the WYSIWYG Editor

The most flexible option is to author the base HTML in Content Marketing, or paste the HTML in from a third party tool, and let general contributors modify the content to fit their needs. Using a WYSIWYG Editor will fulfill most use cases, and is most powerful when engaging a wide range of skills in

your marketing contributors to add content.

Rich Text Editor View	Content Preview
	

When HTML creation can be flexible, the admin will want to configure a Rich Text Editor on a Content Type, or a WYSIWYG custom field that is associated with a Content Type. See the Content Types and Custom Fields documentation for configuration information for either of these objects. Both of these editors have an 'HTML' button that will allow a user to toggle between the 'Source' view of the HTML, and the preview/proofing view of the asset.

All WYSIWYG editors will modify HTML in small ways. It is difficult to predict all of the situations that HTML could be modified because it depends on the construction of the original HTML. When a user toggles between the preview and source view is when CKEditor will attempt to modify HTML to be standards compliant.

Content Marketing uses a popular WYSIWYG editor called CKEditor. CKEditor will assume that HTML should be standards compliant and will modify code in a way to adhere to those standards. For example, it will add paragraph tags <p> around unenclosed text content, it will remove the second
 tag where two

 are listed in order, it will close any HTML tags left open, and it will attempt to unnest improper nesting orders for inline and block level elements.

For those users that are particularly interested to dig into more of the ways a CKEditor may modify HTML, a general Google search on common modifications made by CKEditor will return a volume of results.

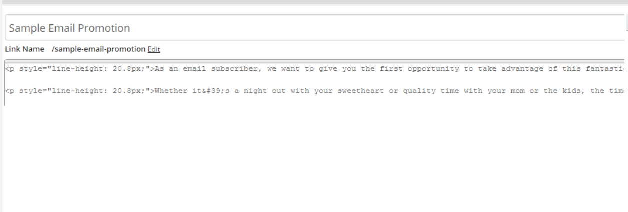
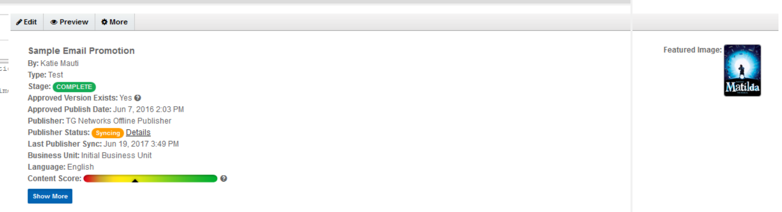
HTML needs to be completely unmodified

For this situation, where HTML is built by hand and the user needs to be able to paste in HTML having the confidence that the HTML has not been modified at all, there are a couple of options.

If the HTML used is the primary body of an asset, the admin can create a Content Type with a Plain Text Editor Type. See the Content Types documentation for configuration information.

If the HTML used is supplemental to the main asset, the admin can create a Custom Field with a Field Type of Large Textbox, which is the equivalent of a textarea. This would commonly be used where an asset has multiple blocks of related content, and one of those blocks may require specific HTML to render properly like a video. See the Custom Fields documentation for configuration information.

In both cases within the authoring view, the field that contains the HTML will not have an option to preview a rendered version of the HTML. In the use case where a user is using a Plain Text Editor, other users can see a rendered version of the content in that field from the Preview area within the Library. If there is a need to attempt to proof the final rendered version prior to approval in workflow, this may be a more desirable option.

Plain Text Editor View	Content Preview
	

3.9 Eloqua Integration FAQs

Can I integrate more than one Content Marketing license to publish content to a single license of Eloqua?

Yes, you may configure Eloqua publishers within multiple licenses of Content Marketing that all publish to a single license of Eloqua. There are no limitations to the quantity of Content Marketing licenses that can be linked to a single license of Eloqua. This is applicable for individual licenses of Content Marketing, as well as individual Business Units. There are no limitations on how many individual Business Units may configured to publish to one license of Eloqua.

How do I use PDFs stored in Content Marketing with my assets in Eloqua?

Assets uploaded within Content Marketing are stored on the Content Marketing CDN, and can be linked to within a content asset.

Customers who are using Content Marketing to build email content collaboratively, and then push that content over to Eloqua will want to upload their marketing collateral - Whitepapers, eBooks, other PDF content - to Content Marketing. Links to those PDF assets can be inserted with customized anchor text within the File Attachments section of the editor.

File assets that have been attached are not automatically pushed over to Eloqua with the content asset, rather remain on the Content Marketing CDN.

Can I publish video content to Eloqua?

It is not possible to publish video content to Eloqua through the use of the Eloqua Publisher. The best practice approach is to host videos on a video hosting solution like Brightcove or publicly on YouTube, and use Content Marketing as the solution to collaboratively review the video content from those hosting solutions or as a raw video file attached to a content asset.

Marketers can then include a thumbnail or an animated .gif using a portion of the video directly into a block of content that will be published to Eloqua. As an example, the editor allows marketers to select a pre-generated thumbnail from any YouTube video to embed into their block.

In a similar vein - videos embedded in assets, or authored using a content type with a video editor type can not be pushed to Eloqua using the Eloqua publisher. An attempt to publish video content with the Eloqua publisher will fail.

3.10 Promoting content FAQs

I've recently updated the Featured Image referenced in my Open Graph tags, but the old image is still being used. How do I ensure the most recent image is used?

The social network used for the promotion may be caching the original Featured Image.

As an example, Facebook will generally cache information referenced in Open Graph tags every ~24 hours. For Facebook, use their URL debugger to learn more about how Facebook is interpreting your URL and re-fresh their cache.

How can I promote my content on LinkedIN?

Published assets can be promoted to a number of different places on LinkedIN including your personal profile, groups, company pages, and showcase pages.

3.11 RSS FAQs

What is an RSS Feed?

A good definition of an RSS Feed can be found on Wikipedia, but to summarize:

An RSS (Rich Site Syndication) Feed or document includes full text, or summarized content with metadata that enables publishers to syndicate content automatically. RSS Feeds enable consumers of content to use one source to review updates from a site without having to visit each site individually.

How do I make my RSS feed available to users?

It is common for publishers to use an RSS feed management tool like Feedburner. The best practice to make a feed available to site visitors would be to include an RSS icon on your hub template that uses a dynamically generated Feedburner URL, or another URL of your choosing.

To access the feed URL for your content, append **/rss** to the end of a publisher URL to get all content for that publisher, or to the end of a category URL to get content for a specific category. This is how the basic URL structure would look:

Publisher:

- http://(your-domain-name.com)/(publisher-name)/rss.

Here is an example using this URL structure:

- http://www.healthy.com/blog/rss

Category:

- http://(your-domain-name.com)/(category-name)/rss

Here is an example using this URL structure:

- http://www.healthy.com/blog/healthy-mind/rss

How many items are returned in my RSS feed?

The 15 most recently published assets are returned for a given RSS feed by default. Users have a couple of optional parameters available to them to customize the results that are returned in their RSS feed.

- **compendium_feed_count**: Use this parameter to customize how many items are returned for the feed, up to 100 items. For example, if you wanted to increase the results returned in the feed to 50, the feed URL would be:

  `http://www.(your-domain-name.com).com/rss?compendium_feed_count=50`

- **page**: Use this parameter to page through a feed. Using the same example, if I wanted page 3 of the most recent results (results 100-149) that same URL would now be:

  `http://www.(your-domain-name.com).com/rss?compendium_feed_count=50&page=3`

All requests for a given RSS feed are cached for a short period of time.

Why are RSS feeds important for your content distribution?

RSS feeds help writers generate content ideas by knowing what is going on it their industry at any moment and allows readers to receive frequent updates on content that is posted on any specific network.

Note: Tracking RSS subscriptions is not completely accurate; your subscriber number can change because at any time, someone can subscribe or unsubscribe, thus causing the number to vary.

How many RSS readers do you have?

Unfortunately, unlike a mailing list, it is not immediately obvious how many RSS readers you have. Your number can easily vary because at any time someone can subscribe or unsubscribe, this causing the number to fluctuate.

Why isn't my feed displaying properly in Firefox?

RSS Feeds may not render properly in Firefox because of the way that Firefox views HTML comment syntax. Firefox feed readers do not recognize multiple hyphens in a sentence. By removing all but one hyphen with a post, the issue will be resolved and your post will display properly in feed readers in Firefox.

Why are Author names not published on RSS feeds?

Oracle Content Marketing does not publish author names on RSS feeds. In order to be compliant with RSS 2.0 standards, publishing an author name would also require the inclusion of the author's email address. Due to the sensitive nature of this information, all author information has been omitted from the RSS Feed.

3.12 Search FAQs

When I search for a content asset within Manage Content, what parts of the content will my query match?

Search will query against the body of an asset and the content contained within attachments. Searching combined with the use of the filter can help users pinpoint specific assets that available for use.

3.13 StoryCapture FAQs

What is StoryCapture?

StoryCapture provides an easy way for your customers to share their stories and, in turn, create content for your network.

StoryCapture allows readers and customers to access and fill out a form requesting certain information that you have designated. The form also gives the author the ability to include an image with their story. Once submitted, the story must be approved by the blog Administrator before appearing live.

How can we use StoryCapture?

You can use StoryCapture to collect success stories, great customer service experiences, contest entries, or any other type of content you would like.

You can share the link to your StoryCapture form with customers via email or add a Call-to-Action to your blog asking for customers to share their story or review.

You can notify submitters that their story is live on your blog and encourage them to share it with their friends and family using social networks.

Why would we want to use StoryCapture?

StoryCapture is a simple way for your clients to share the experiences they have had with your company. It provides the tools needed to leverage powerful word of mouth marketing and can help engage your clients with your product.

Fresh and relevant content on your blog can be generated by anyone across the globe. This is key for any successful blog campaign. More relevant content on your blog also contributes to better organic SEO results.

How do I set up a StoryCapture?

To get StoryCapture for your network, please contact your sales representative or your Account Manager.

Once you have spoken to your sales representative or Account Manager, you will fill out a form with the specifics of your StoryCapture needs. Oracle Content Marketing's Support Team will then create your StoryCapture based on this information and provide you with a finished story collection page.

3.14 Tracking scripts FAQs

The following are frequently asked questions about using the Oracle Content Marketing tracking scripts within the Content Marketing application.

I am currently using the stats.js tracking script, should I upgrade to the new script, stats_bundle.js?

Over time, the original tracking script (stats.js) has been upgraded to expand tracking capabilities across publishers. The current tracking script filename that all new customers should use is **stats_bundle.js**.

Legacy

http://app.compendium.com/js/stats.js

Current

http://app.compendium.com/js/stats_bundle.js

The legacy stats.js tracking script will continue to work for customers who are only publishing to a Content Hub using Content Marketing. For those customers, there is no additional benefit to upgrade and the legacy script will continue to work as expected.

For customers who are publishing to Wordpress, the usage of the current tracking script (stats_bundle.js) is required.

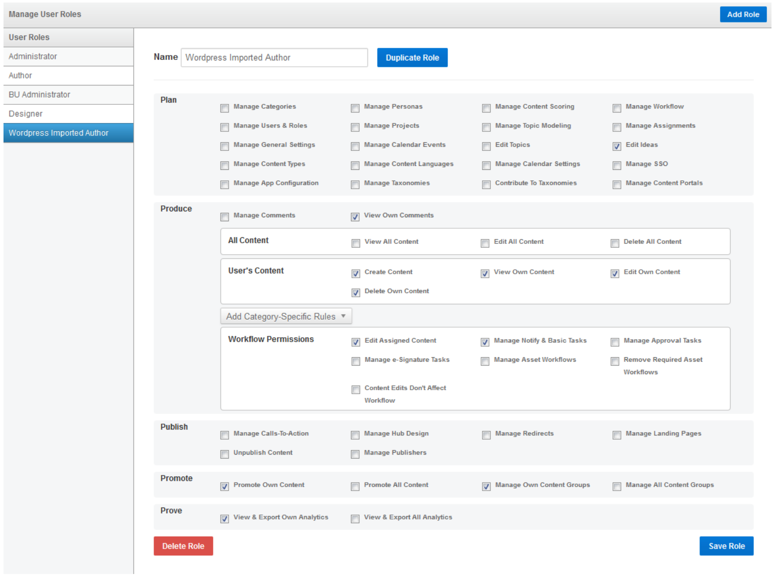
3.15 Wordpress Integration FAQs

When I Import users from Wordpress into Content Marketing, does each user receive their own account?

Yes. All Authors / Users that have created at least one asset in Wordpress will automatically be imported, and a user account will be created for them in Content Marketing.

Customers should discuss their usage plans of Content Marketing when integrating with Wordpress prior to running the import. The use case will determine whether it is appropriate to send welcome notifications to all imported users. The import provides an opt-in checkbox to send these notifications, by default these notifications will not be sent. For a use case like ghost blogging, sending notifications to each author may not be desirable. If users will be transitioned to Content Marketing for authoring and publishing content to Wordpress, the best practice would be to enable this option.

The imported users are assigned a basic set of rights common to author contributors.



Administrators can modify this newly created role as needed. See Rights and Roles for more information.

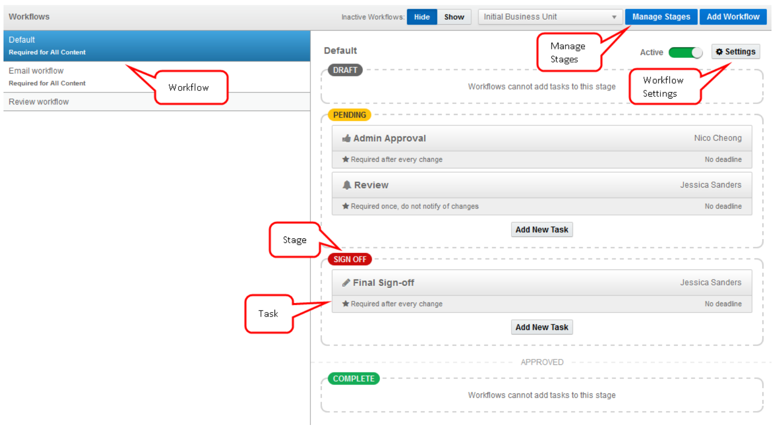
Can I test my Wordpress Integration with a staging environment?

If the staging environment is publicly accessible, then a publisher can connect to a staging environment to test the integration prior to a rolling out Content Marketing to the wider organization. Staging environments that require a user to authenticate will need to whitelist access for Content Marketing: 209.167.231.0/24 in order to setup a successful test integration.

3.16 Workflow FAQs

What is a Workflow?

A Workflow is a collections of tasks grouped by stage, a workflow could contain 20 tasks or just one. They can be automatically required based on an asset's content type, publisher, category, author or language. This allows for different workflows to be automatically applied for videos, content published on the CMS, content written by Joe Smith, and so on. At the asset level, multiple workflows are combined to create a single list of tasks.

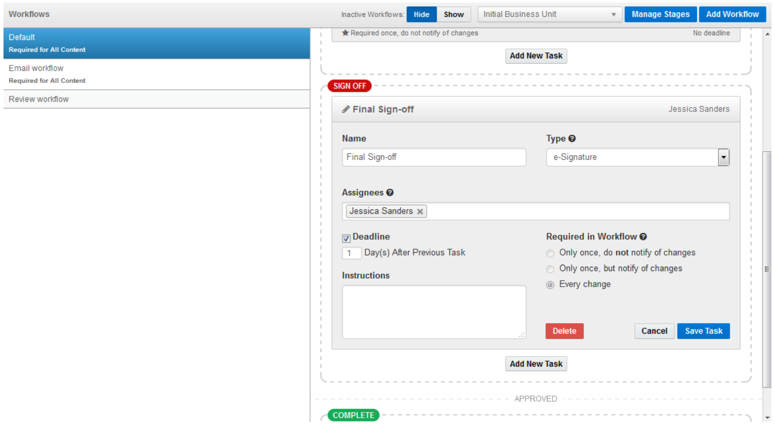


What are the requirement rules?

Accessible via the Workflow Settings dialog, the requirement rules define when a workflow is required. *Workflows can be automatically required based on attributes of the asset such as content type or language*. A workflow can also be required for every content asset. Some workflows may be entirely optional and never required. User roles can be given the right to remove a required workflow.

What is the workflow priority?

Accessible via the Workflow Settings dialog, the priority defines how tasks from different workflows are merged together at the asset level. Tasks in the same stage from workflows with lower numbers will be merged before tasks with workflows from higher numbers (1-10 is the priority order). For example, if a workflow containing a "Proofread" task in the editing stage has a 1 priority and another workflow containing a "SEO Audit" task in the editing stage has a 10 priority, the "Proofread" task will be placed first because its workflow has a lower priority number. By default, workflows are given a priority of 10. We recommend only changing the priority if the task order is important.



How do deadlines, reminders, and notifications work?

Deadlines allow the assignees a specified number of days to complete a task. Tasks are not required to have a deadline. The task deadline is converted into a specific date on a content asset at the time that task is reached. That same calculation is also performed for any subsequent tasks, up until the next task without a deadline. The deadline for a task will not change unless workflow configuration changes are applied to the content asset. Users with the appropriate permissions can also override the period and set a specific date on any content asset task.

When a task becomes active, an email notification is sent to all of the task's assignees. Two days prior to the deadline, if the task is not yet completed, another email notification will be sent to all of the assignees. On the day of the deadline, if not yet completed, a final email notification will be sent to all of the assignees.

What happens when I edit, add, or remove a stage?

Changes to stages will take place immediately within any content where the workflow has not yet been completed. If a stage is deleted, it will be deleted from content that is in progress. However, if a completed asset is edited in any way, this will trigger an update to the asset’s workflow, including all stage edits, additions or removals. Completed assets are left as-is until edited.

How do I edit, add, or remove a stage?

We recommend minimizing edits to stages to avoid confusing users. A stage can be edited at any time. Simply click the gear icon to change the name or color of a stage. From the edit dialog, a stage can also be deleted. Deletions happen immediately and cannot be undone.

New stages can be added by clicking the New Stage button. Stages can also be reordered by dragging and dropping the stages. We recommend a small number of stages for simplicity.

What happens when I edit, add, deactivate, or remove a workflow?

Changes to a workflow will be applied to any content where the workflow has not yet been completed. If a workflow is deleted, any uncompleted tasks on existing content will be deleted. However, completed tasks will remain on the workflow list until the content is edited. Again, the goal of the workflow panel is to show both what has happened in the past and what needs to happen in the future.

If a completed asset is edited in any way, this will trigger the entire workflow to be updated, including all workflow edits, requirement changes, additions, or removals. Completed assets are left as-is until edited.

How do I edit, add, or remove a workflow?

Simply click the Settings button in the top right of the workflow configuration screen to edit a workflow's name, priority, or requirement rules.

What happens when I edit, add, or remove a task from the workflow configuration screen?

Changes to a task will be applied to any content where the task has not yet been completed.

> **Note**: If a task is edited on the content asset screen (as opposed to the workflow configuration screen), those edits will not be affected by edits to the workflow configuration. See below for more details.

If a task is deleted, it will be removed from content that is in progress. If a completed asset is edited in any way, this will trigger the entire workflow to be updated, including all task edits, additions, and removals. Completed tasks are left as-is until the asset is edited.

What happens when I edit, add, or remove a task from a content asset's workflow panel?

If a task is changed at the asset level, we only modify that particular task instance. The changes will not affect the master workflow definition. Changes at the asset level are permanent and will not be overridden by changes to the workflow configuration (with the exception of the task being deleted from the workflow configuration). For example, if a task is defined with a deadline of five days and is changed to ten days for a particular content asset, that deadline will remain ten days on that specific content asset - even if the master task deadline is then changed to eight days.

Tasks created on the content are called "Ad-Hoc Tasks". They have no effect on the workflow configuration and only appear on that particular content asset. Ad-hoc tasks are useful for tasks that only apply to one content asset. They are always ordered at the end of a stage, after all other tasks in the stage.

What will happen to my content if I edit the master workflow setup?

Workflow can be changed at any time. Any edits to the master workflow setup follow this basic principle: the workflow panel for a content asset reflects both what has happened in the past and what needs to happen in the future. In general, this means that when the workflow setup is adjusted:

- For content which has completed workflow, changes will not take effect until the asset has been edited.
- For content which has partially completed workflow, changes will not take effect in completed stages unless that content is edited. Changes will be reflected in stages that are not yet completed.
- For new content, workflow changes will also immediately take effect.
- Content is never approved, unapproved, or published based on a change in the workflow configuration.

Note: Changes to the master workflow configuration may take a few minutes to be displayed on individual content assets. It is not instantaneous.

4 Analytics

The Analytics area in Oracle Content Marketing provides you with useful information about the content you are producing, including how customers access and interact with your content, and the rate of production and the number of views by dimensions that reflect key components of a content strategy. Analytics reports are divided into two categories: performance analytics and production analytics. Once a report is configured, you can export the analytics data to an XLSX or CSV file for distribution or reporting purposes.

Performance analytics

Performance analytics provide insight into how your customers are accessing and interacting with your content. Some performance report metrics include: views, average time on page, keywords used, traffic sources, and referral traffic. You can also select a content asset and see how that specific asset is performing.

Production analytics

Production analytics provide insight into the amount of content you are producing. Production reports help determine how production efforts are tracking for both your content assets and social promotions. You can view metrics such as the quantity of assets and promotions that are scheduled six months into the future, or view how project-specific assets are trending towards completion.

Learn more: For more information, sign up for the Oracle Content Marketing: Performance Analysis course from the Oracle Marketing Cloud Academy.

4.1 Performance Analytics

Performance analytics provide insight into how your customers are accessing and interacting with your content. Some performance report metrics include: views, average time on page, keywords used, traffic sources, and referral traffic. You can also select a content asset and see how that specific asset is performing.

Note: Performance analytics are only tracked for content hubs built with Content Marketing and Wordpress sites. See Wordpress Integration for more information on installing analytics tracking on your Wordpress site.

4.1.1 Viewing performance analytics dashboard components

The performance analytics dashboard provides you with valuable information about the content that is published. This information can also be filtered to provide specific information, learn more about filtering analytics.

Note: To access the analytics dashboard, navigate to **Analytics** > **Performance**.

Dashboard categories

The following information is displayed in this dashboard:

- **Unique Contributors**: Measurement of the different number of authors that produced content given your date range and filters.
- **Assignments**: The number of content assignments issued to authors.
- **Content Published**: Measurement of the total amount of content published given your filter parameters.
- **Social Promotions**: The number of social promotions sent from the Oracle Content Marketing application. Any social promotions sent from an external tool, like Oracle Social Relationship Management, are NOT included in total social promotions. If you promote a single piece of content to multiple platforms, each platform is considered a separate promotion.

  > **Example**: If you created one Social Promotion within Oracle Content Marketing and selected to promote it to a Twitter account, LinkedIn account and Facebook page, then this is considered 3 social promotions within the Analytics Dashboard.

- **Views**: Refers to the number of page views for your content. Content that is measured includes individual posts and landing pages.

  A view is calculated every time a page is loaded in a browser with JavaScript enabled. The Content Marketing tracking script records a page view every time a page is loaded. Ensure the following URL for the tracking script is embedded in your hub:

  http://app.compendium.com/js/stats_bundle.js

  Note that this analytics data is only available for content hubs built with Oracle Content Marketing, and Wordpress sites. See Wordpress Integration if you do not already have analytics tracking enabled for your Wordpress site. For more information about the tracking script, see Tracking scripts FAQs.

- **Average Time on Page**: Refers to the average amount of time a user has interacted with a page.

The average time on page statistic is reflective of how long visitors are actually reading and interacting with your content, as opposed to just having a URL open in a browser. User actions that are used to determine an interaction include scrolling the page, clicking on the page, or moving the mouse. Every 15 seconds, if a user interacts with the page, another 15 second interval is recorded. This method is used to determine how long the user was interacting with the page on the page view.

> **Example**: A user visits a page and reads the content for 15 seconds, then scrolls down the page. A second 15 second interval is recorded. The user then visits another browser tab for 5 minutes before returning to this original tab. They scroll again indicating a third 15 second internal. For this one page view, Content Marketing records a total of 45 seconds of interaction.

- **Visitor Action Data**: CTA clicks and outgoing link clicks are compiled into the visitor actions statistic. Visitor actions reporting can also be customized on a per-client basis though the addition of custom event tracking. If you are interested in adding additional tracking to this field, please contact your Account Manager for additional information.
- **Keywords**: The keywords field reports the number of distinct keywords used over the given period of time that landed visitors on your content. Distinct keywords means similar terms, with slight variations, are captured as two terms.

> **Example**: The term 'green bicycle' and 'bicycle green' are considered two keywords.

- **Referral Traffic**: Referral traffic captures all traffic from links on websites on different domains.

> **Note**: If you are a client who is on reverse proxy, traffic coming from your website to the blog or hub will not be counted as referral traffic. This is because a reverse proxy allows your website and blog/hub to be on the same domain, so we cannot capture the transition from site to blog.

- **Keywords Used**: The Keywords Used chart shows the number of distinct keywords searched per day that landed visitors on your website. The total number displayed in this chart will likely not match the keywords field above, as duplicate searches per day are only counted as one visit within the Keywords Used graph.
- **Traffic Sources**: This graph shows where the traffic is coming from.
  - **Search**: Search traffic is a measurement of traffic that came to your site as a result of the visitor finding you through a search engine, such as Google.
  - **Email**: Email traffic is recognized through the addition of a query string parameter to all relevant links within an email. Oracle Content Marketing Analytics uses the same tag as Google Analytics to identify email traffic. To add this tracking, please add the parameter of utm_medium=email to all hub links within your emails.
  - **Referral**: Referral traffic measures traffic that came to your site from direct links on other websites.
  - **Direct**: Direct traffic encompasses any traffic without referrer information. This often includes links from certain email clients, social links without tracking information, or someone directly typing in a URL to a piece of content.
  - **Social**: Social traffic is a result of links to your site from Facebook, Twitter, and so on.

Percent Comparisons on Dashboard

A percentage and either and up or down arrow appears next to each of the information groups described above, this value represents a comparison between this data and previously collected data. The default is a thirty day, month over month comparison. If you choose to change the date range, the comparison data will update to reflect the same period length comparison.

> **Example**: If you change the date range to reflect one week, the *Content Published* comparison will update to reflect a comparison to the previous week's data.

4.1.2 Viewing performance analytics reports

The top performance metrics under each Performance Report reflects the same data until you select an individual Author, piece of Content or Category to view.

To view cumulative performance data:

1. Navigate to **Analytics** > **Performance**, the analytics dashboard opens.
2. Click a dimension to filter the report.

3. View the information displayed in this dashboard:
    - **Page Views**: Refers to the number of page views for your content. Content that is measured includes individual posts and landing pages.

A view is calculated every time a page is loaded in a browser with JavaScript enabled. The Content Marketing tracking script records a page view every time a page is loaded. Ensure the following URL for the tracking script is embedded in your hub:

http://app.compendium.com/js/stats_bundle.js

Note that this analytics data is only available for content hubs built with Oracle Content Marketing, and Wordpress sites. See Wordpress Integration if you do not already have analytics tracking enabled for your Wordpress site. For more information about the tracking script, see Tracking scripts FAQs.

- **Average Time on Page**: Refers to the average amount of time a user has interacted with a page.

  The average time on page statistic is reflective of how long visitors are actually reading and interacting with your content, as opposed to just having a URL open in a browser. User actions that are used to determine an interaction include scrolling the page, clicking on the page, or moving the mouse. Every 15 seconds, if a user interacts with the page, another 15 second interval is recorded. This method is used to determine how long the user was interacting with the page on the page view.

  > **Example**: A user visits a page and reads the content for 15 seconds, then scrolls down the page. A second 15 second interval is recorded. The user then visits another browser tab for 5 minutes before returning to this original tab. They scroll again indicating a third 15 second internal. For this one page view, Content Marketing records a total of 45 seconds of interaction.

- **All Events/Visitor Actions**: CTA clicks and outgoing link clicks.
- **Keywords**: Number of distinct keywords used over the given period of time that landed visitors on your content.
- **Author Name**: Name of the author who created the content.

- **Content Count**: Number of pieces of content produced by that author, viewed during the given time period.
- **Date Published**: Date the content was published.
- **Views**: Total views on content within the date range.
- **Avg. Time**: Average time spent on content within that date range.
- **Visitor Actions**: Actions taken (CTAs and outgoing link clicks) by visitors on content within date range.
- **Keywords**: Number of distinct keywords used over the given period of time that landed visitors on your content.

> **Note**: In the *Authors* tab, the data in the report accounts for each user based on the post date that appears on the live blog. If the post is not scheduled for future release, the date shows for when the post was first saved as a draft. However, if the post is scheduled for future release, then the date will appear as that specified date.

4.1.3 Viewing actions analytics reports

The Actions analytics report provides valuable insight into the kinds of actions performed on your website.

To view analytics for actions:

1. Navigate to **Analytics** > **Performance**, the analytics dashboard opens.
2. Click the **Actions** tab.
3. Filter the data if necessary.
4. View the information displayed in this dashboard:

- **All Events**: Displays the total number of unique visitor actions per day over the given time period.

- **Category**: Displays a list of the actions that have been defined on your Content Marketing hub and the amount of actions performed for that type.

CATEGORY	ACTION	COUNT
Outgoing Link	Click	193
CTA	Click	126
Custom: Apartment Purchase	Conversion	31

- **CTA Name**: Displays the amount actions taken by visitors on any defined CTA (Call to Action) or widget on your hub with custom tracking set up.

CTA NAME	COUNT
Location-based Search Form	61
Free Consultation 250x250	33
Negotiating eBook	20
California Banner	12
New York Banner	14
Renting vs Buying Banner	8

- **Outgoing Link**: Displays the number of visitor actions in the form of Clicks on all outgoing links within the date range and filters.

OUTGOING LINK	COUNT
apartmentshopper.com/blog/a.jsp?a=FH8?url=%2Fwheels%2Findex.jsp?affiliate=FH8?bPostID=post-id-4938519d-7b56-44ab-98de-1bad973954ae	83
apartmentshopper.com/blog/index.jsp?affiliate=FH8	37
apartmentshopper.com/blog/index.jsp?affiliate=HJ1	31
apartmentshopper.com/blog/a/a.jsp?F7?bPostID=post-id-ddafdc5e-c06b-44d7-bfa1-9a2d01e6f7ba	24
apartmentshopper.com/blog/index.jsp?affiliate=TX3	21
apartmentshopper.com/blog/a/a.jsp?T%2FA+KM2?affiliate=TY9?bPostID=post-id-a1a6fd6f-bd82-4f37-842e-855bde67c98c	15
apartmentshopper.com/blog/index.jsp?affiliate=TY9	14
apartmentshopper.com/blog/up-grade/Products.jsp?affiliate=HJ1	10
apartmentshopper.com/blog/a/a.jsp?H8?bPostID=post-id-ee573303-32ae-495a-96e2-cf1a8f2a0d40	7
apartmentshopper.com/blog/a/a.jsp?T%2FA+KO?affiliate=TY9?bPostID=post-id-3f55173b-af89-411c-b70a-685366255fac	7
apartmentshopper.com/blog//Products.jsp?affiliate=FH8	6

Next

4.1.4 Viewing search and rankings analytics

The search and ranking analytics provides you with valuable information about the number of visits to your website that result from specific search terms.

Oracle Content Marketing currently receives keyword information from the following search engines:

- Google
- Yahoo
- Bing
- AOL
- Ask.com
- Blekko
- Duckduckgo

> **Note**: Keyword information is only be sent over a HTTP protocol. Any service using HTTPS will encrypt keyword data, and therefore no keyword information will be sent to Content Marketing.

To view the search and keyword analytics graph:

1. Navigate to **Analytics** > **Performance**. The analytics dashboard opens.
2. Click **Search & Rankings**.
3. View the information displayed in this dashboard:
    - **People From Search**: This is a graph that is displayed along the top of the page showing the number of distinct search terms that drove traffic to your content per day over the given time period.
    - **Keyword**: Displays search term keywords.

Note: The (unspecified) keywords are a result of a change to Google’s privacy policy. Whenever a user is signed-in to their Google account, any searches they execute will have the natural search term removed from reporting. Google explains it is trying to protect the privacy of its users by not providing their confidential search information. Unfortunately, because Google is stripping out the term before the users reaches your site, Oracle Content Marketing is also unable to identify the term.

- **People**: The number of individuals who visited your content based on the search term indicated.

4.1.5 Viewing traffic analytics

The Traffic analytics tab provides you with valuable information about your website visitors.

To view traffic analytics data:

1. Navigate to **Analytics** > **Performance**, the analytics dashboard opens.
2. Click the **Traffic** tab.
3. View the information displayed in this dashboard:
    - **Views**: Refers to the number of page views for your content. Content that is measured includes individual posts and landing pages.

      A view is calculated every time a page is loaded in a browser with JavaScript enabled. The Content Marketing tracking script records a page view every time a page is loaded. Ensure the following URL for the tracking script is embedded in your hub:

      http://app.compendium.com/js/stats_bundle.js

Note that this analytics data is only available for content hubs built with Oracle Content Marketing, and Wordpress sites. See Wordpress Integration if you do not already have analytics tracking enabled for your Wordpress site. For more information about the tracking script, see Tracking scripts FAQs.

- **People**: The number of individual visitors on your hub each day. For example, if a visitor views three individual pieces of content in one visit, they are considered only one person.
- **Average Time on Page**: Refers to the average amount of time a user has interacted with a page.

  The average time on page statistic is reflective of how long visitors are actually reading and interacting with your content, as opposed to just having a URL open in a browser. User actions that are used to determine an interaction include scrolling the page, clicking on the page, or moving the mouse. Every 15 seconds, if a user interacts with the page, another 15 second interval is recorded. This method is used to determine how long the user was interacting with the page on the page view.

  > **Example**: A user visits a page and reads the content for 15 seconds, then scrolls down the page. A second 15 second interval is recorded. The user then visits another browser tab for 5 minutes before returning to this original tab. They scroll again indicating a third 15 second internal. For this one page view, Content Marketing records a total of 45 seconds of interaction.

- **Visitor Engagement Rate**: This metric looks to identify the percentage of people who are engaging with your site for a length of time. Visitor Engagement is determined by a user who is on your site for thirty seconds or longer. The visitor may go to more than one page but remain on your page. Visitor Engagement Rate should closely mirror your Bounce Rate, in that the higher your Visitor Engagement Rate, the lower your Bounce Rate.
- **New Visitors Percentage**: The percentage of first time visitors on your site. For example, if two people come to your site in one day, and one of them has been to your site before and the other has never been to your site, your New Visitors metric would read 50%.

- **Referrer**: Logs the site that referred visitors to your site. Meaning, the site that contains an outgoing link(s) that led visitors to your site.
- **Views**: The number of views on your site as a result of the referring site that visitors came from within the date range.

4.2 Production Analytics

Production analytics provide insight into the amount of content you are producing. Production reports help determine how production efforts are tracking for both your content assets and social promotions. You can view metrics such as the quantity of assets and promotions that are scheduled six months into the future, or view how project-specific assets are trending towards completion.

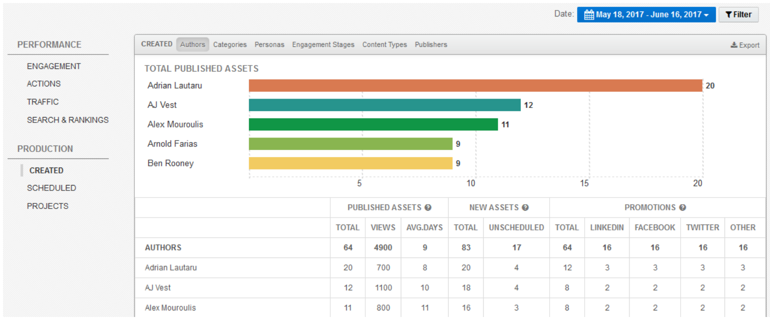
4.2.1 Viewing analytics for created assets

The created assets analytics report provides valuable information about the total number of assets and unpublished assets.

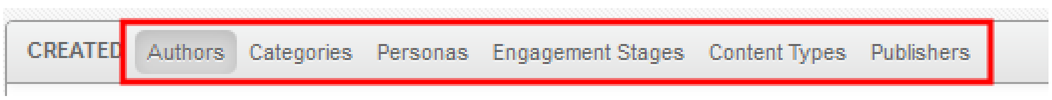
Tip: If your instance contains multiple Business Units, use the Business Unit toolbar to view data from multiple Business Units.

To view analytics for created assets:

1. Navigate to **Analytics** > **Production**. The analytics page for created assets appears.



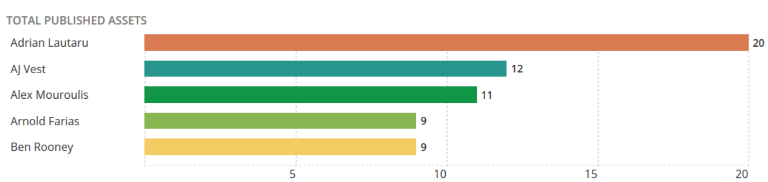
2. Click a dimension to filter the report.



3. Filter the data if necessary.

4. View the information displayed in this dashboard:

   - **Total Published Assets**: Displays the total amount of assets published.



   - **Published Assets**: Displays total published assets, total page views for these assets, and the average number of days necessary to create those assets. Average days is a straight average, calculated from the first day an asset is in the idea workflow stage to the first time an asset crosses the approved line in workflow.

PUBLISHED ASSETS		
TOTAL	VIEWS	AVG.DAYS
64	4900	9

- **New Assets**: Displays the total amount of new assets created and the total amount of those created assets that do not have a scheduled publish date.

NEW ASSETS	
TOTAL	UNSCHEDULED
83	17

- **Promotions**: Displays the total amount of promotions broken out by linked account. The **Other** column totals content assets that have been promoted to Eloqua and Responsys.

PROMOTIONS				
TOTAL	LINKEDIN	FACEBOOK	TWITTER	OTHER
64	16	16	16	16

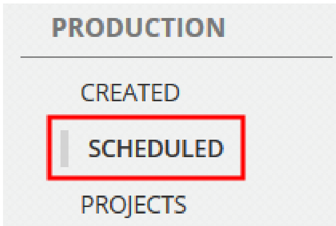
4.2.2 Viewing analytics for scheduled content assets

The Scheduled analytics report provides valuable insight into the total quantity of assets and promotions that are scheduled six months into the future. The Scheduled report is commonly used in monthly planning sessions to identify gaps in content production.

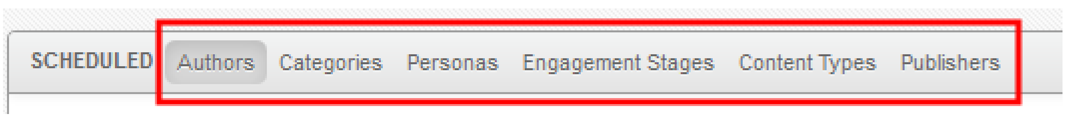
To view analytics for scheduled assets:

1. Navigate to **Analytics** > **Production**.

2. Click **Scheduled**.



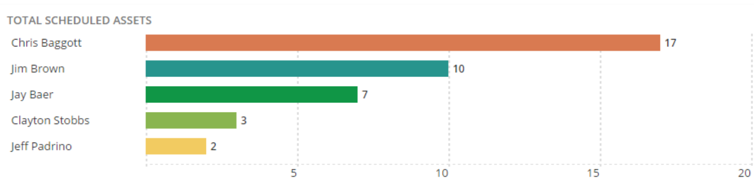
3. Click a dimension to filter the report.



4. Filter the data if necessary.

5. View the information displayed in this dashboard:

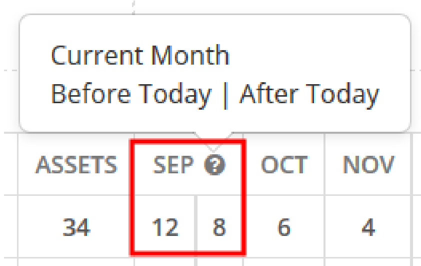
   - **Total Scheduled Assets**: Displays the total amount of assets scheduled for publishing.



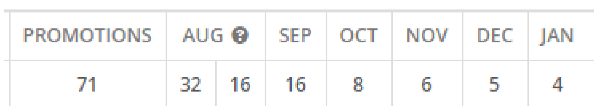
   - **Assets**: Displays the total scheduled assets by month for the next six months.

	ASSETS	SEP		OCT	NOV	DEC	JAN	FEB
AUTHORS	34	12	8	6	4	2	1	1
Chris Baggott	17	7	4	3	2	1	0	0

   The current month is split into two columns. The column on the left reflects content assets that have been published up to today's date. The column on the right reflects the content assets that are scheduled for the remainder of the month after today's date.



- **Promotions**: Displays the total scheduled promotions by month for the next six months for all linked accounts including promotions to Eloqua and Responsys.

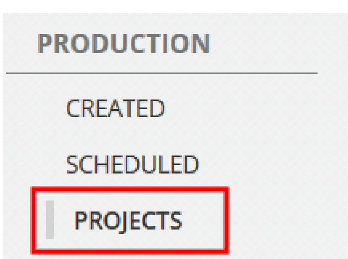


4.2.3 Viewing project analytics

The projects analytics report provides valuable information about how the work related to each of your projects is progressing.

To view project analytics:

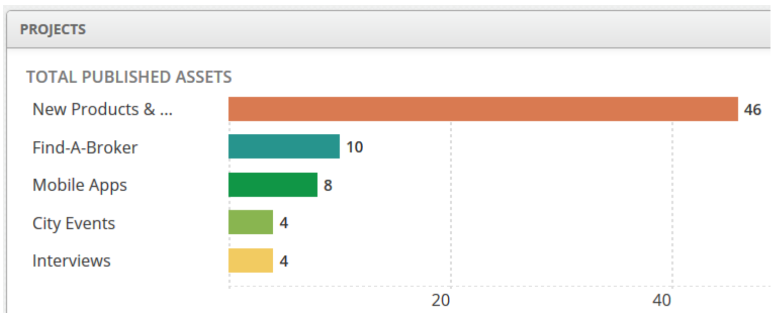
1. Navigate to **Analytics** > **Production**.
2. Click **Projects**.



3. View the information displayed in this dashboard:

- **Total Published Assets**

  Displays the total amount of published assets per project.



- **Projects**

  Displays the total amount of published assets, unscheduled assets, percentage of completion, start and end dates, and tasks overdue per project.

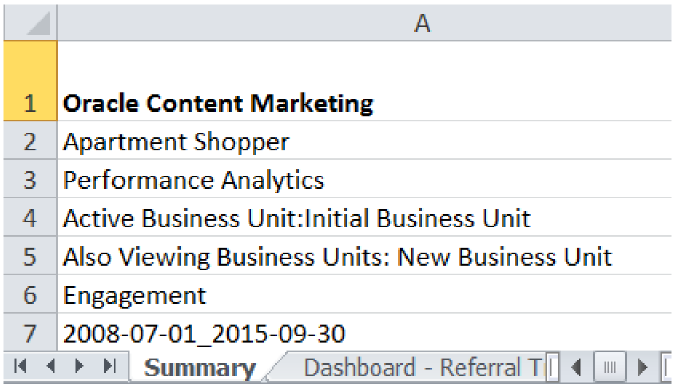
PROJECTS	PUBLISHED	ASSETS	%COMPLETE	START DATE	END DATE	TASK OVERDUE
New Products & Services	46	50	92	2014-01-01	2014-12-31	1

  - **Published**: The total amount of published assets per project.
  - **Assets**: The total amount of assets per project (including unscheduled assets).
  - **%Complete**: The percentage of content assets that are published out of the total amount of assets per project.
  - **Start Date/End Date**: The start and end date for the project.
  - **Task Overdue**: The total amount of overdue workflow tasks on content assets associated with a given project.

4.3 Overview of exported reports

After exporting analytics data, the downloaded report will contain a different worksheet or .csv file (depending on the report you choose) for each analytics dimension within the report type.

A summary is also included which details information such as the network name, the currently active Business Unit and any other Business Units within the view at the time of the export, report data, and the report date range.



	A
1	**Oracle Content Marketing**
2	Apartment Shopper
3	Performance Analytics
4	Active Business Unit:Initial Business Unit
5	Also Viewing Business Units: New Business Unit
6	Engagement
7	2008-07-01_2015-09-30

See the following report types for more information about each individual report.

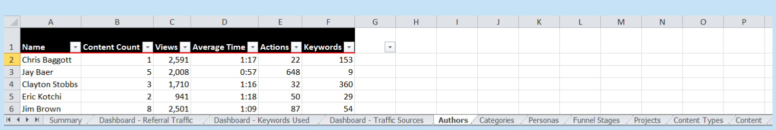
4.3.1 Performance reports

The Performance analytics reports provide insight into how your customers are accessing and interacting with your content.

Engagement report

The Engagement report provides you with valuable information about the content that is published, categorized by the dimensions: authors, categories, personas, engagement stages, projects, content types, and content.

Example: The Authors worksheet entails information about the content that authors are producing.



	Name	Content Count	Views	Average Time	Actions	Keywords
2	Chris Baggott	1	2,591	1:17	22	153
3	Jay Baer	5	2,008	0:57	648	9
4	Clayton Stobbs	3	1,710	1:16	32	360
5	Eric Kotchi	2	941	1:18	50	29
6	Jim Brown	8	2,501	1:09	87	54

In addition to the eight reporting dimensions, the Engagement report also includes information regarding the dashboard components: referral traffic, keywords used, and traffic sources.

Actions report

The Actions report provides you with information about the actions performed on your content, categorized by the dimensions: categories, events, and outgoing links.

Example: The Categories worksheet outlines the amount of action events that occurred by event category.

Name	Type	Count
Outgoing Link	Click	193
CTA	Click	126
Custom: Apartment Purchase	Conversion	31

Summary | **Categories** | Events | Outgoing Links

Traffic report

The Traffic report provides you with valuable information about your website visitors, categorized by the dimensions: page views, people, average visit length, visitor engagement rate, new visitor percentage, and referrers.

Example: The Page Views worksheet outlines the amount of page views for your website.

Date	Views
30/09/2015	373
29/09/2015	452
28/09/2015	522
27/09/2015	988
26/09/2015	1738

Summary | **Page Views** | People | Average Visit Length | Visitor Engagement Rate | New Visitor Percentage | Referrers

Search & Rankings report

The Search & Rankings report provides you with information about the number of visits to your website that result from specific search terms, categorized by the dimensions: people from search, or keyword.

Example: The Keywords worksheet outlines the keywords that brought visitors to your website.

Keyword	People
apartment shopping	1,738
san francisco apartments	1,249
new york apartments	1,145
how to find an apartment	784
cheap apartments	488
apartment moveout	191
luxury apartment	14
apartment vs condo	800
sf apartments	411
chicago apartment	414

Summary | People From Search | **Keywords**

4.3.2 Production reports

The Production analytics reports provide insight into the amount of content you are producing.

Created assets report

The Created assets report outlines the total number of assets and unpublished assets, categorized by the dimensions: author, category, personas, engagement stages, content types, and publisher.

Example: The Authors worksheet provides insight about the assets created by each author.

	TOTAL PUBLISHED	VIEWS	AVG. DAYS	TOTAL NEW
AUTHORS	203	0	4.22	629
Eloqua SC	32	0	1.23	63
Gary King	10	0	0	2
Hemant Sharma	9	0	0	1
Kevin Galang	9	0	3	30
Jeff Rothe	8	0	0	47
Chris Muir	7	0	0	3
Zack Mikesell	7	0	12	25
Jason McVay	6	0	19.67	7
Alex Jensen	6	0	1.5	6
Kim Tornes	6	0	4.25	10

Summary | **Authors** | Categories | Personas | Funnel Stages | Content Types | Publishers

Scheduled assets report

The Scheduled assets analytics report provides insight into the total quantity of assets and promotions that are scheduled into the future, categorized by the dimensions: author, category, personas, engagement stages, content types, and publisher.

Example: The Personas worksheet outlines the amount of scheduled assets created per Persona over six months.

	SCHEDULED	Sep		Oct
PERSONAS		0	0	4
At-Risk Student	2	0	0	2
Green Activist	1	0	0	1
Doctor	1	0	0	1
A Risk Loving Shareholde	0	0	0	0
AILA New Member	0	0	0	0
Buyer	0	0	0	0
C-level	0	0	0	0
Clark Kent	0	0	0	0
Contractor/ Small Home	0	0	0	0
Current Student	0	0	0	0

Summary / Authors / Categories / **Personas** / Funnel Stages / Content Types / Publishers

Projects report

The Projects report provides information about the work related to each of your projects.

Example: The Projects worksheet highlights various information about the project and the work involved.

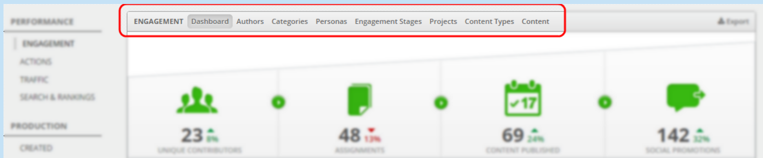
Name	Published Asset Count	Asset Count	Percent Complete	Start Date	End Date	Tasks Overdue Count
June Conference	6	17	35	2014-06-09	2014-06-13	1
Find-A-Broker	5	9	56	2014-06-02	2014-06-05	4
Oracle Q4 Promotion	5	27	19	2014-04-01	2014-05-30	24
Autumn	4	9	44	2014-08-04	2014-08-15	2
CX Webinar	4	9	44	2014-02-28	2014-03-30	7
Oracle Direct QW	4	8	50	2014-05-03	2014-05-10	1
Spring	4	7	57	2014-05-05	2014-05-09	4
Content Marketing World	3	7	43	2014-07-01	2014-09-30	13
Green Chemistry	3	4	75	2015-04-01	2015-06-05	28
Summer	3	16	19	2014-06-02	2014-06-06	35

Summary / **Projects**

4.4 Exporting analytics data

You can export any of the seven Performance or Production reports to an XLSX or CSV file. Each analytics dimension within the report will be exported as either a separate worksheet within a spreadsheet or as a separate .csv file within a .zip file.

Example: If exporting an *Engagement* report in the XLSX file format, within the XLSX file, one worksheet for each of the eight different dimensions ranging from *Authors* to *Content* will be exported within the spreadsheet.

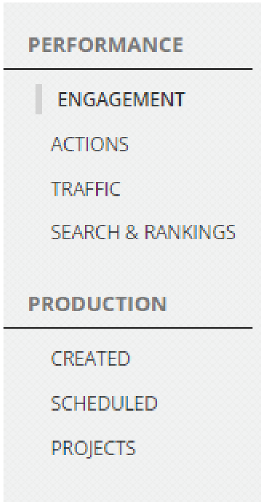


If exporting a CSV file, a .zip file is created that contains multiple CSV files for each dimension. For detailed information about each report, see Analytics reports.

Your currently selected filter settings are reflected in all exports, allowing you to customize the exported data as needed.

To export analytics data to an XLSX or CSV file:

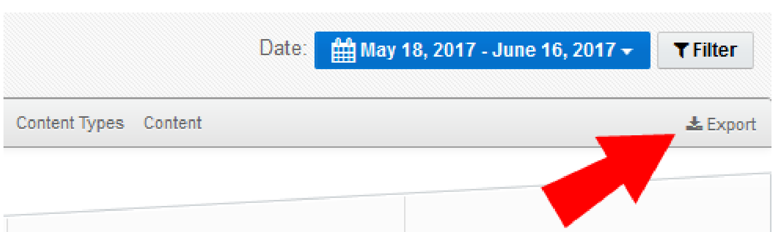
1. Navigate to **Analytics** > **Performance** or **Production**.
2. Select a report under **Performance** or **Production** for which you want to export data.



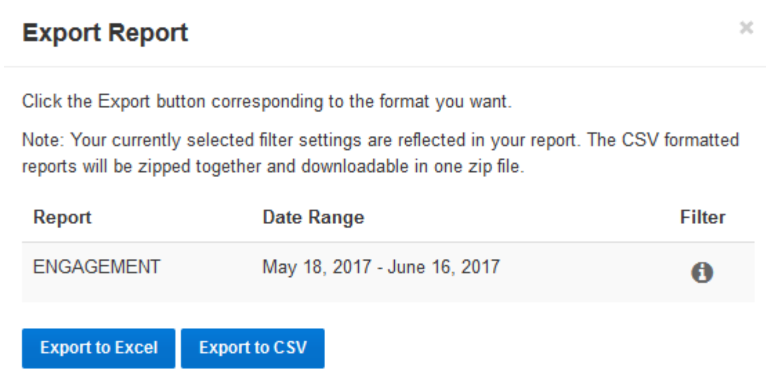
3. Filter the report as needed. See Filtering analytics for more information.

> **Tip**: If you are working in a multi-Business Unit environment, you can export data for the active Business Unit as well as for any other Business Unit selected in *Also Viewing*. The *Engagement* report (*Content* dimension) includes an additional column indicating the Business Unit for specific content assets.

4. Click **Export**.

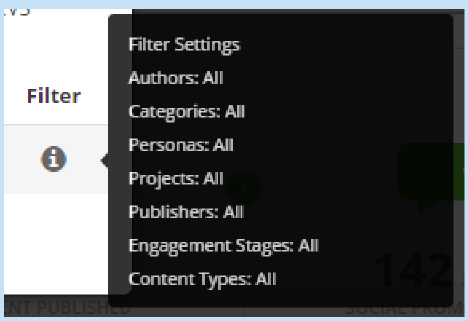


5. Select a format for the export in the *Export Report* dialog. The dialog also lists the report type, date range, and a list of currently set filter criteria for the exported file.

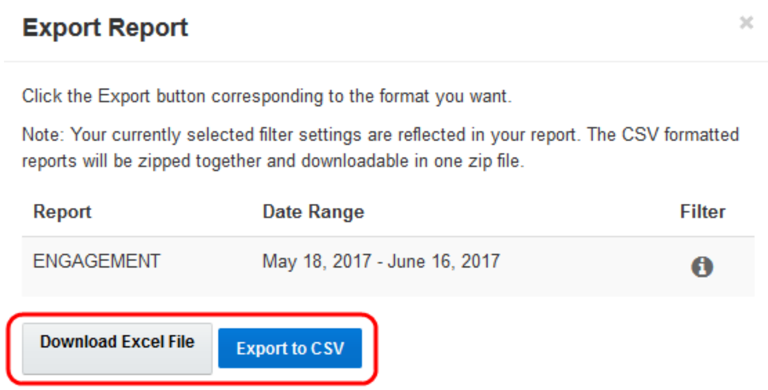


- **Export to Excel**: Click to export the analytics report to an XLSX file.
- **Export to CSV**: Click to export the analytics report to a CSV file.

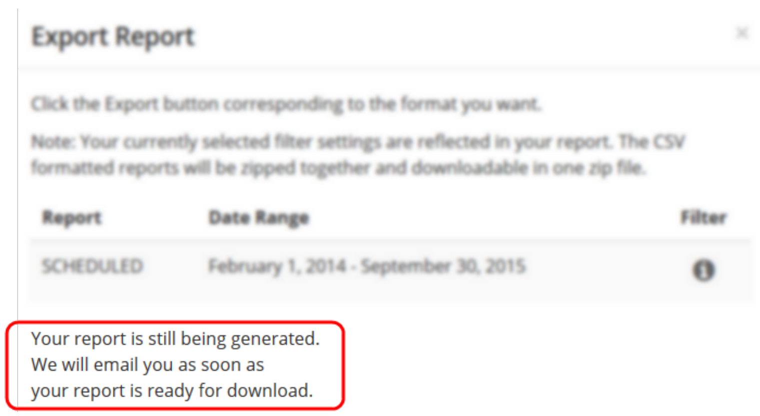
Tip: Mouse over the filter information icon to view the currently selected filter options.



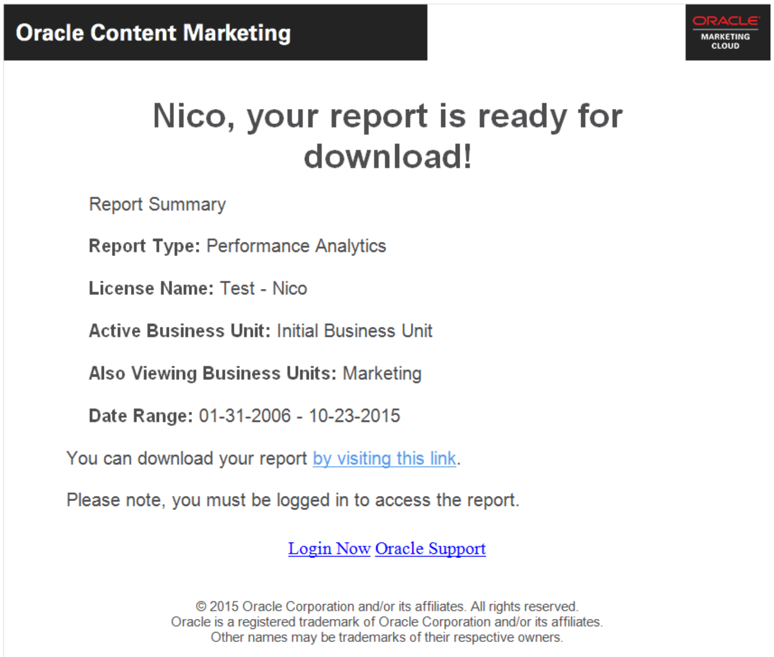
6. Once the export is ready, click **Download Excel File** or **Download CSV File**.



If the report takes longer than a few seconds to generate, the report will be emailed to you.



You will receive an email when the report is ready to download. If your license is configured for multiple Business Units, your email notification will display the active Business Unit.



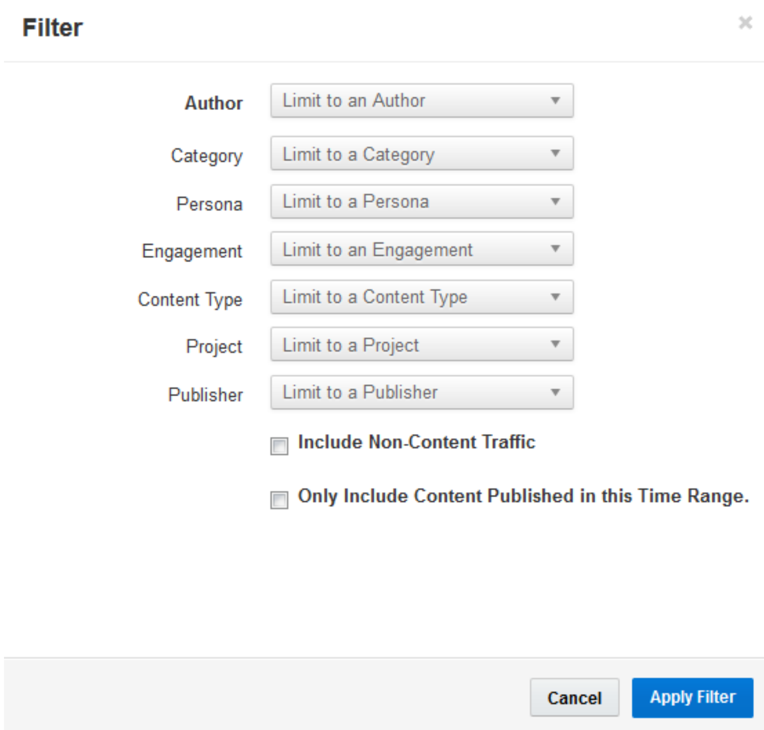
The report is downloaded. See Analytics report exports for more information about exported files.

4.5 Filtering analytics

You can limit which analytics data will be displayed by adjusting the filters. Analytics defaults to a 30-day date range, but this can be adjusted using the date range filter at the top of the dashboard.

To filter analytics:

1. Navigate to **Analytics** > **Performance** or **Production**, the analytics page opens.
2. Click **Filter** in the upper right-hand corner, the filter window opens.



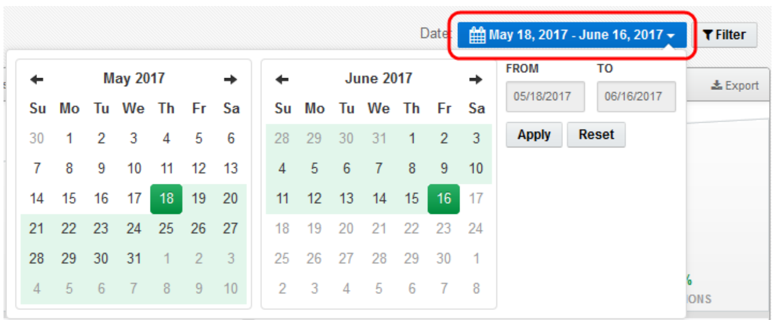
3. Select a filter option:

- **Author**: Choose from any of your authors, or All Authors.
- **Category**: Choose from any of your categories.
- **Persona**: Choose from any of your personas.
- **Engagement Stage**: Choose an engagement stage.
- **Content Type**: Choose a content type in your license, or **All Content Types**.
- **Project**: Choose from one or more of your projects.
- **Publisher**: Choose from one or more of your publishers.
- **Include Non-Content Traffic**: By default, analytics displays data for content only, such as individual content or landing pages. Selecting this option will include performance data (data points like views, keywords) for Content Hub listing pages, a page that lists all of the content for specific category. This item is optional, depending on reporting needs it may not be ideal to include performance data that isn't attributable to one specific asset.

- **Only Include Content Published in this Time Range**: Select to filter only for published content within the given time range.

4. Click **Apply Filter**. The data is filtered according to the values you entered.

5. Click the date range button in the upper right-hand corner. In the drop-down calendar, select your new range by clicking the dates in the calendar or by entering the range in the **From** and **To** date fields.



6. Click **Apply**, your new date range is applied to the dashboard.

Note: Any updates made to the default time period are persistent and will update across reports.

5 Apps

Oracle Content Marketing apps allow marketers to integrate Content Marketing with other software solutions to extend the capabilities to plan, produce, and distribute content.

5.1 Available apps

- Brightcove
- Cloudwords
- Dynamic Content
- GaggleAMP
- Lionbridge app
- Oracle Marketing Calendar

View Integrations for a list of other applications that are natively integrated within the Content Marketing solution.

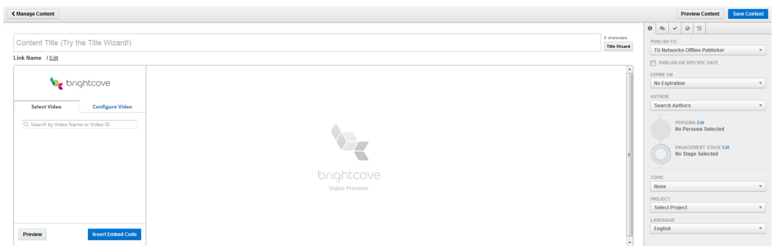
5.2 Brightcove app

The integration with Brightcove allows users to discover and embed videos into content assets within Content Marketing. The integration with Brightcove helps marketing teams support the following use cases:

- Marketing agencies, contractors, and employees can use collaboration tools and workflow to approve video used in assets published to the web, that can be shared across business units

- Proofing capabilities for non-marketing team members to review video and text as they will appear prior to publishing
- Video integrated into key marketing planning tools like the Editorial Calendar and storage in a single Content Library

The Brightcove UI is deeply integrated into Content Marketing, with a familiar experience for including videos in the content production process.



5.2.1 Configuring the Brightcove app

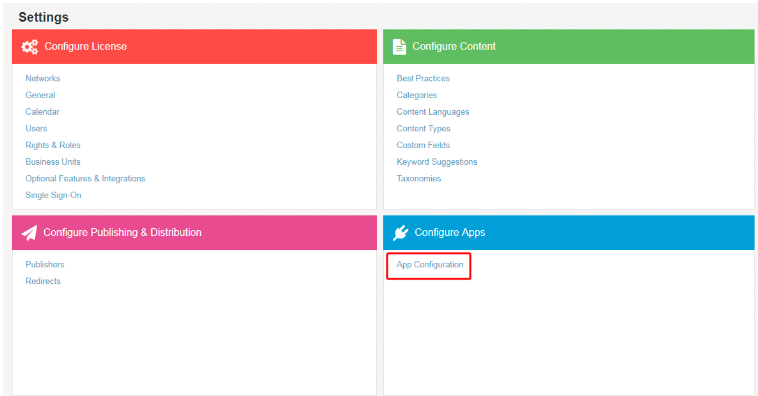
In order to use the Brightcove app in Oracle Content Marketing, it must first be configured. Let's look at how to configure the app and how users can use Brightcove within their license of Content Marketing.

Requirements

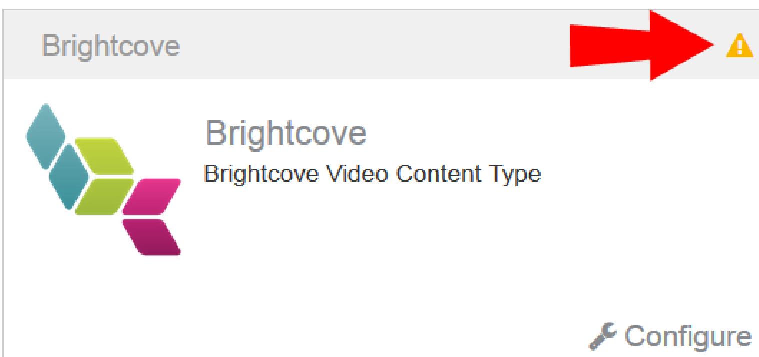
- The app must be installed on the license. See the Feature Availability document for availability information for your license. Installation is performed by a Super Admin. If your license is eligible to have the app installed, work with your account representative to submit a service request through My Oracle Support.
- To configure the app, the user must have the **Manage App Configuration** right enabled. See Rights & Roles.

To access the Brightcove App in Content Marketing:

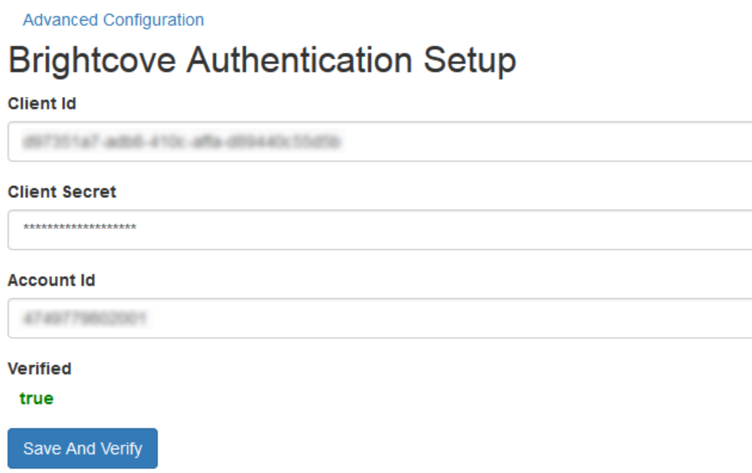
1. Navigate to **Settings** > **App Configuration**.



2. You will be taken to the *Apps* screen, where all apps available to be configured for the license will be displayed. Apps that have not yet been configured will display a yellow warning icon. Click **Configure** to configure the Brightcove app.



3. The *Brightcove Configuration* screen opens with the fields required for configuration. These fields are Client ID, Client Secret, and Account ID.



To obtain the necessary information from your Brightcove license:

Now that you know where to configure your Brightcove App, let's look at where to gather the keys that are needed to perform the configuration. The following instructions will help you work with your Brightcove administrator to gather the right information to correctly setup the app.

When making a request to your admin to setup the app, you will be requesting the admin email the following information:

- Account ID - An approx. 13 integer ID
- Client ID - Long string of characters and integers
- Client Secret - Long string of characters and integers

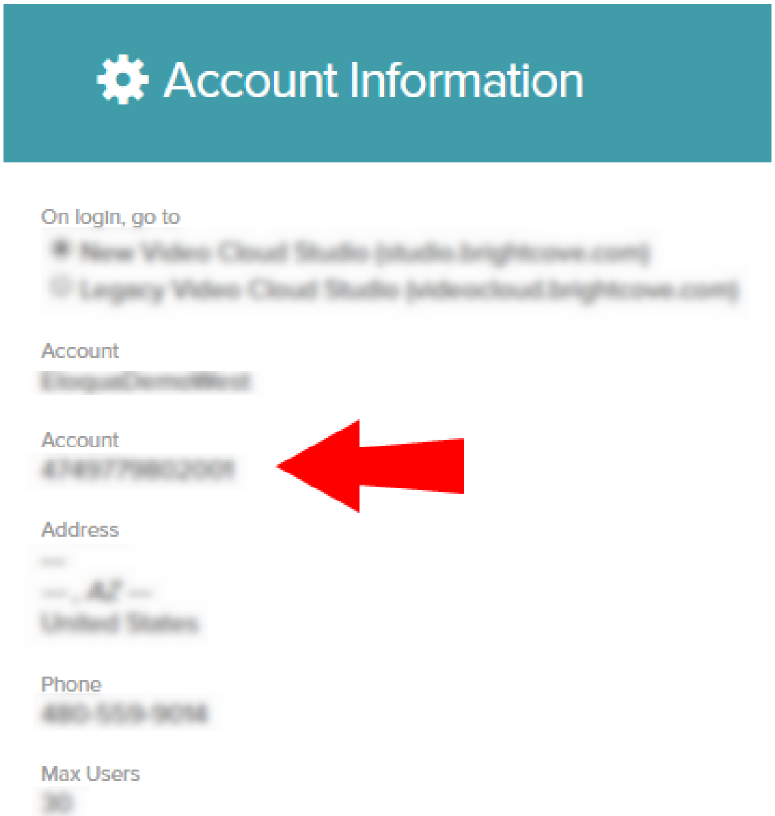
When sending the email to your administrator, you will want to supply the following information. Read through the following instructions for additional context on their usage:

- Register New App
- Name
- Short Description

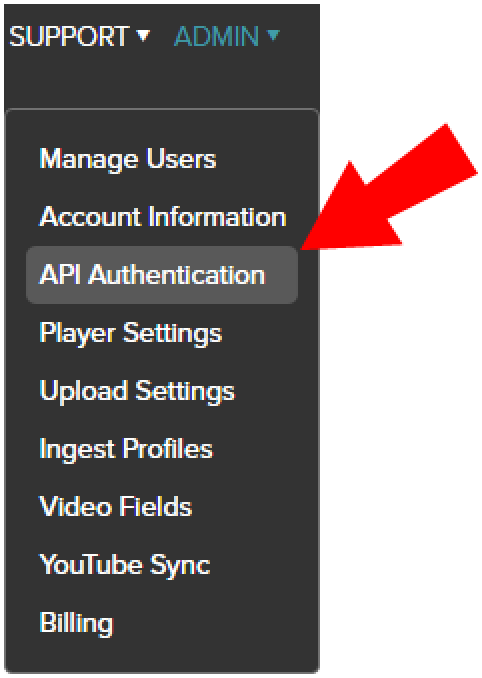
- Account Name
- App Rights

Tip: A step in the configuration process requires the Brightcove administrator to register a new app to get the key for the Client ID and Client Secret fields. When registering a new app in Brightcove, the Client Secret key will only display once, and cannot be procured again if the key is not properly copied. Where possible to reduce any mistakes in copying the needed keys, sit with your Brightcove administrator when walking through the configuration process.

1. **Account ID**: To obtain the Account ID within Brightcove, navigate to **Admin** > **Account Information**. The Account ID is the integer key listed under 'Account'. Copy and paste this key into the Account ID field within Content Marketing.



2. **Client ID, Client Secret**: To locate your Client ID and Client secret, navigate to **Admin** > **API Authentication**.



3. Once in the API Authentication screen, select **Register New Application**. You will be prompted to register your application to obtain the necessary credentials in order to call the Brightcove APIs.

4. Enter a name and a short description for the app.

> **Tip**: Provide a clear name and description for the app so that an admin can come back at any time and know the purpose the app serves. The best practice would be to suggest a title and description for your app that is emailed with your instructions to the Brightcove admin.

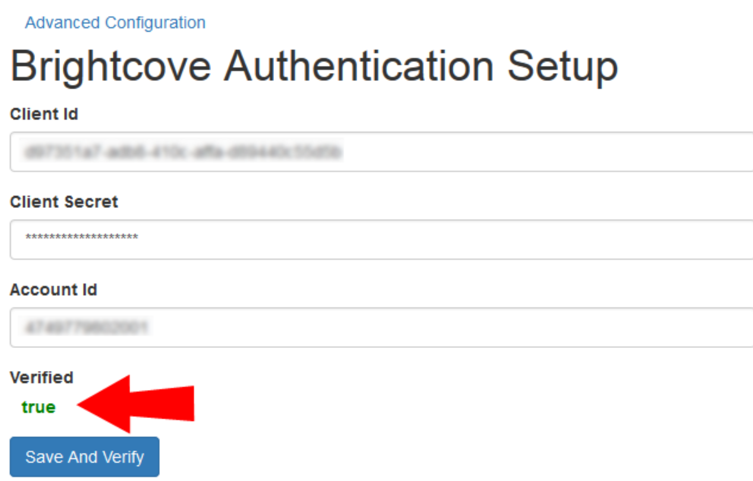
5. From the list of 'Available Account' select and add the appropriate account for to authorize for the app.

6. For API permissions, under CMS, Select **Video Read** and **Video Read/Write**. Under Players, select **Read** and **Read/Write**.

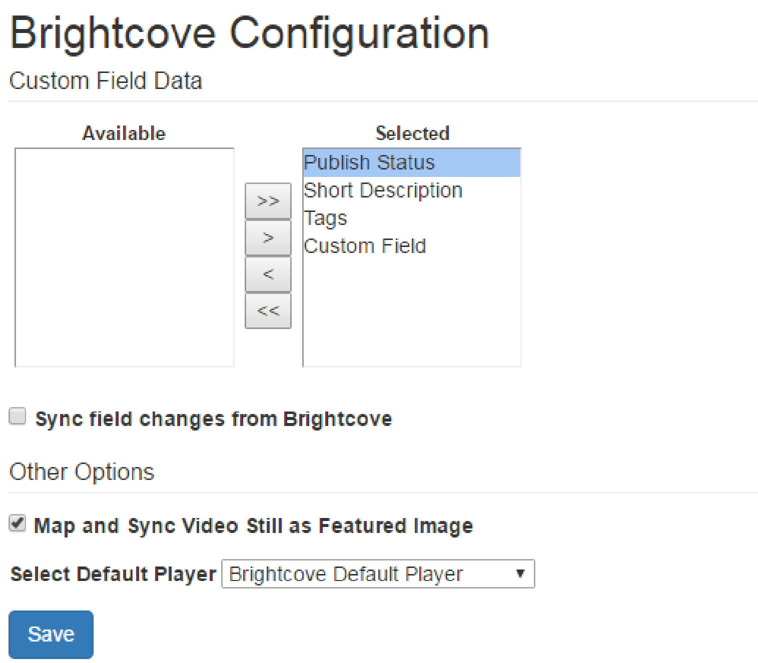
7. You can now click **Save** to register your new app. After saving the newly registered app, the Client ID and Client Secret will appear.

> **Reminder**: This is the only time the Client Secret key will be available, make sure to correctly copy this key.

8. Copy and paste them into the *Brightcove Configuration* screen within Oracle Content Marketing and click **Save and Verify**. The verified field should display as *true*.



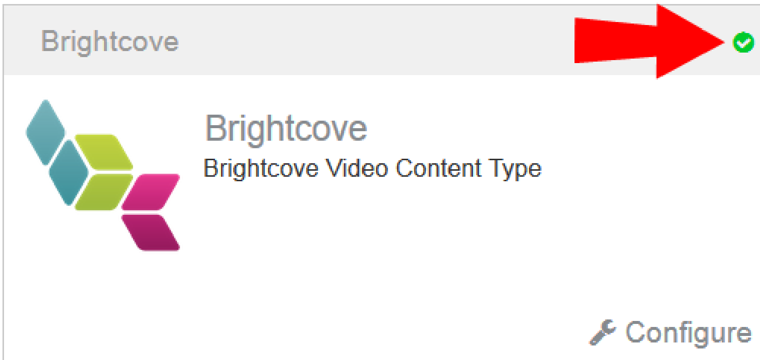
9. Click **Advanced Configuration**, and review the configuration options for this app.



- **Custom Field Data**: Your Brightcove fields will display in the *Available* column. Move the fields that you want synced on assets within Content Marketing into the *Selected* column.
- **Sync field changes from Brightcove**: If enabled, any changes to your fields in Brightcove will be automatically propagated to the custom fields in Content Marketing.
- **Map and Sync Video Still as Featured Image**: If enabled, Brightcove allows users to map Video Stills as the featured image on a content asset and sync any changes to Video Stills automatically. Featured images can be pulled from an asset to use as the best image to draw a click when spotlighting a published asset. There are pre-built places in the app where Featured Images are used, one example is when publishing content to Wordpress.
- **Select Default Player**: Set the *default* player that should be preselected from the list of available players when a user is embedding Brightcove video in Content Marketing.

10. With both Basic and Advanced configuration options reviewed, click **Save** to finish your app configuration.

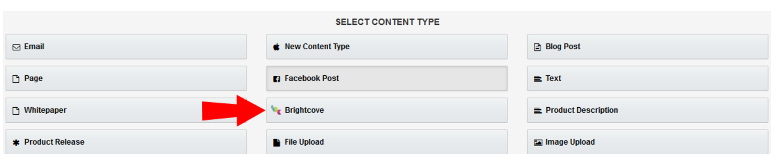
11. In the Apps screen, the Brightcove app will now display a small green check mark in the upper right corner, indicating the app has been successfully configured.



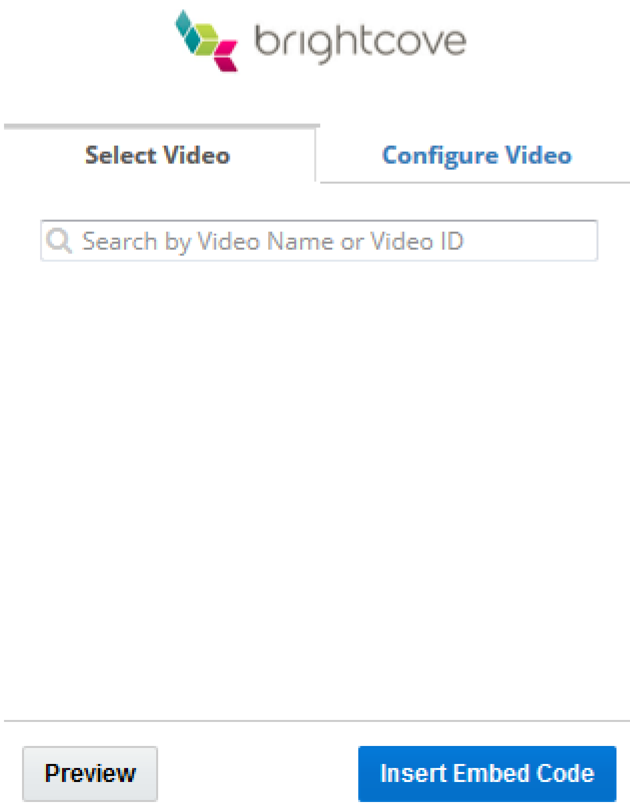
5.2.2 Using the Brightcove app

After your app has been configured, you can create a new piece of content using video from Brightcove. Let's begin by creating a new content type for Brightcove content using the Brightcove integration.

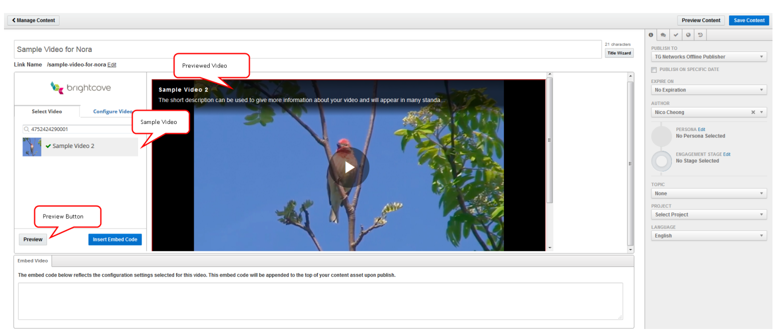
1. Navigate to **Collaboration** > **Create Content**. Inside the content editor, you will see Brightcove listed under *Select Content Type*. Click on the Brightcove icon.



2. The screen defaults to **Select Video**. Search for a video using a query, or if you have a spreadsheet with Brightcove information, input the appropriate Video ID in the search field. A list of videos will display automatically as you type.



3. (Optional) To preview a video and possibly watch a portion, click **Preview**. The video will display in the video preview screen. Once you have found the appropriate video, finalize that selection by choosing the player.

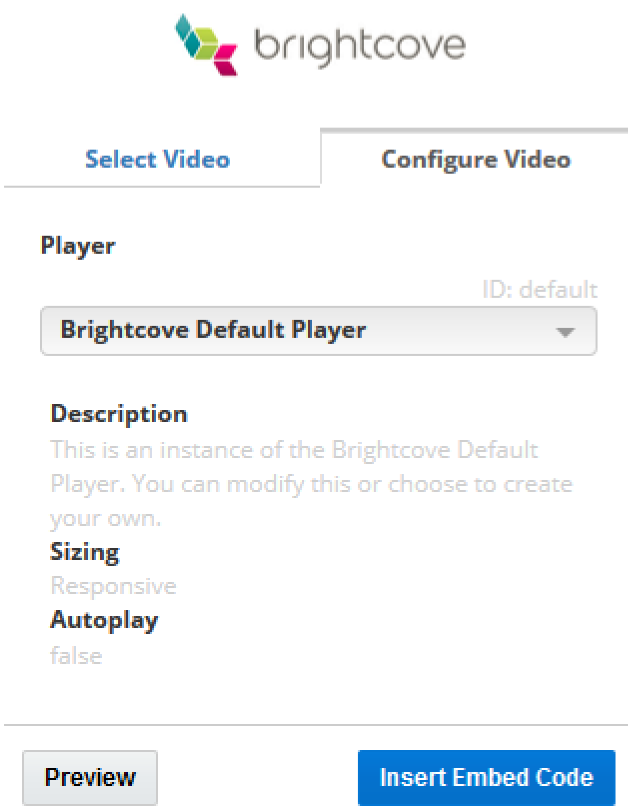


4. Click the **Configure Video** tab.

5. Here you will select the appropriate player to use for your video. From the Player dropdown,

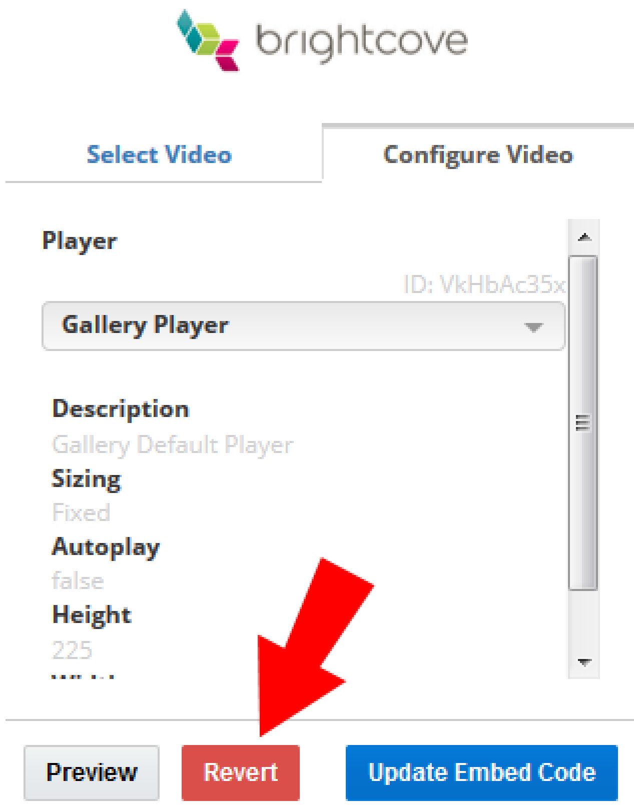
browse the available players - basic information about the player configuration will display below including Description, Sizing, and whether Autoplay is enabled.

At any time you can click 'Preview' to update the preview of the video using the selected player.



6. Once you've chosen the final video and player, click **Insert Embed Code**.
7. To save your video select **Save Content**.

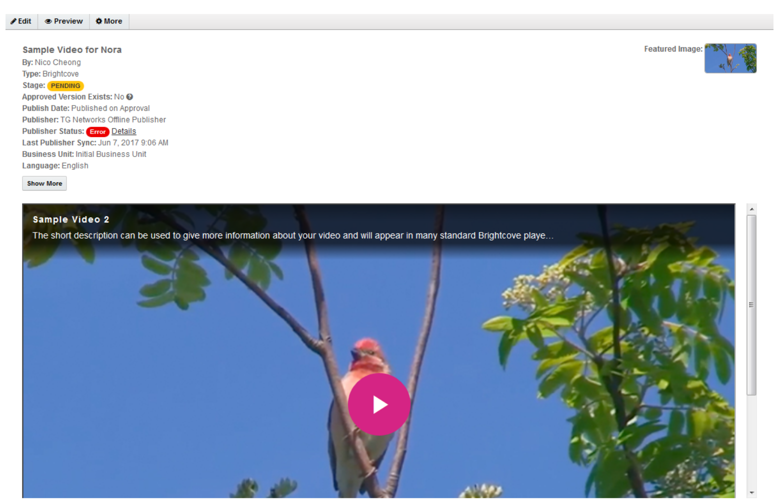
At any time, you can go back and change the video you've selected previously using the same process. If the user is trying to find a new video, but decides they will stick with their original selection, a 'Revert' button will appear to the right of the 'Preview' button to revert the video and player back to their original selection.



Using Brightcove content within the marketing production workflow

Proofing

Users involved in the editorial workflow can review the video by playing it directly from within the Library preview, without having to enter edit mode.



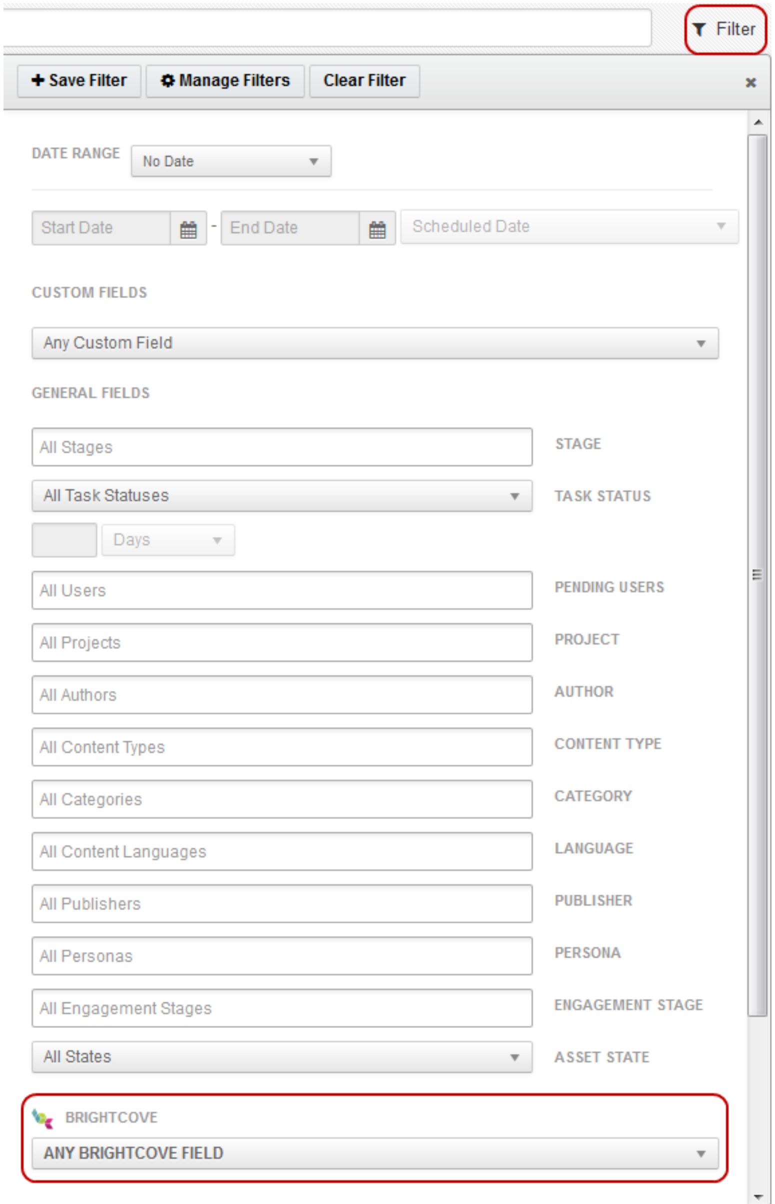
Publishing

Users can can post the asset either to a Content Marketing Content Hub or to Wordpress using our native Wordpress integration.

Searching

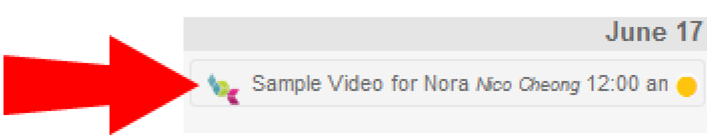
Once your Brightcove content has been created it will appear in the content list. You will see the Brightcove icon to the bottom left of the content asset title.

From the library, users can Filter to see a list of Brightcove specific content types and filter those content types by Brightcove specific field values under the *Custom Field* drop down.



Visibility on the calendar

Users can choose to publish content on a specific date. When you do so, it will appear under that date in the Editorial Calendar. The Brightcove icon will appear next to the content asset title.



5.3 Cloudwords app

The Cloudwords app enables marketers to create translation projects to send your content to Cloudwords to be translated. The translation process follows a simple workflow:

1. Users add assets to a new, or existing translation project.
2. The project and all contained assets are sent to Cloudwords.
3. The user manages the vendor selection, bid management process and asset review processes within Cloudwords.
4. The final translated content is automatically sent back to Oracle Content Marketing.

5.3.1 Configuring the Cloudwords app

In order to use the Cloudwords app in Oracle Content Marketing, it must first be configured. Let's look at how to configure the app and how users can use Cloudwords within their license of Content Marketing.

Requirements

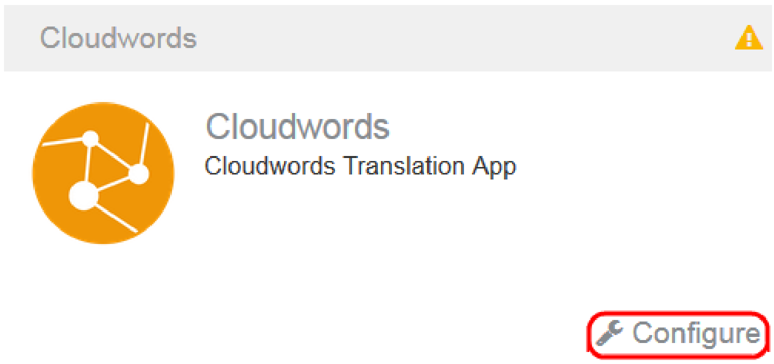
- The app must be installed on the license. See the Feature Availability document for availability information for your license. Installation is performed by a Super Admin. If your license is eligible to have the app installed, work with your account representative to submit a service request through My Oracle Support.
- The **Manage App Configuration** right within Content Marketing. See Rights & Roles.

To configure the Cloudwords app:

1. Follow these instructions to generate a Cloudwords App Key.

2. In Content Marketing, navigate to **Settings** > **App Configuration**.

3. Find the Cloudwords app and click **Configure**.



4. Enter the Cloudwords App Key from Step 1.

5. For sandbox Cloudwords accounts, select **Use Cloudwords Sandbox API**.

6. Click **Save Settings**.

5.3.2 Creating translation projects in Cloudwords

Create translation projects to send your content to Cloudwords to be translated.

Prerequisites

- A configured Cloudwords app.

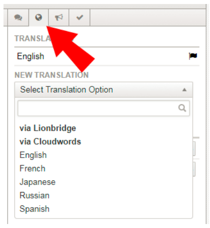
To create a new translation project:

1. Navigate to **Collaboration** > **Library**.

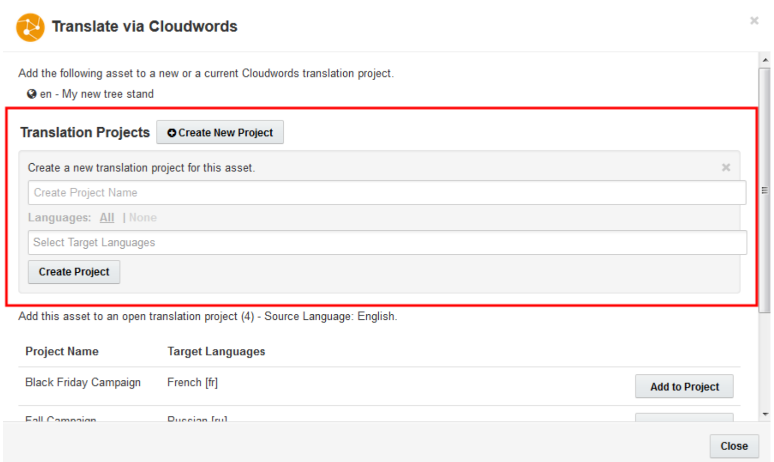
2. In the Content List, select a content asset to send off for translation.

3. Click the **Translate Content** panel.

4. From within the panel under **New Translation**, **Select Translation Option** select **Via Cloudwords**. If you do not see this option, see Troubleshooting translation management.



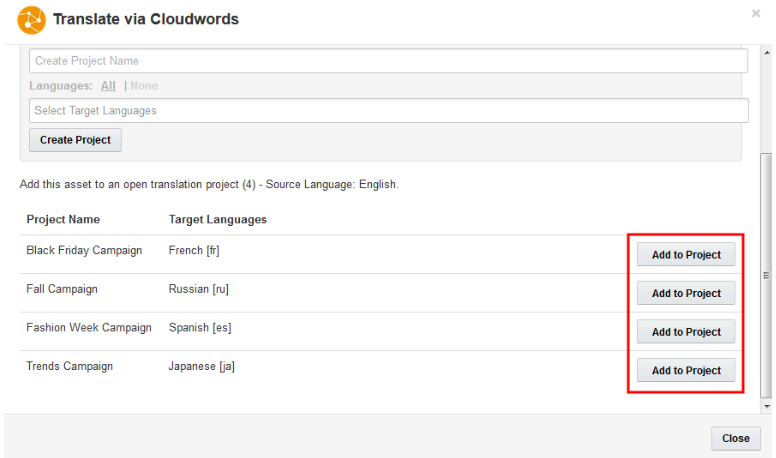
5. Click **Create New Project** and enter the project details.



- **Create Project Name**: Enter a name for the translation project.
- **Select Target Languages**: Select the content languages you want to translate the asset to. You have the option to select all or remove all defined languages added to a project. If you do not see the desired content language, see Adding Content Languages to learn more.

6. Click **Create Project**. Your project will now appear in the list below of all active Cloudwords projects.

7. Find the project you just created, and click **Add to Project** to add the content asset to the new translation project.

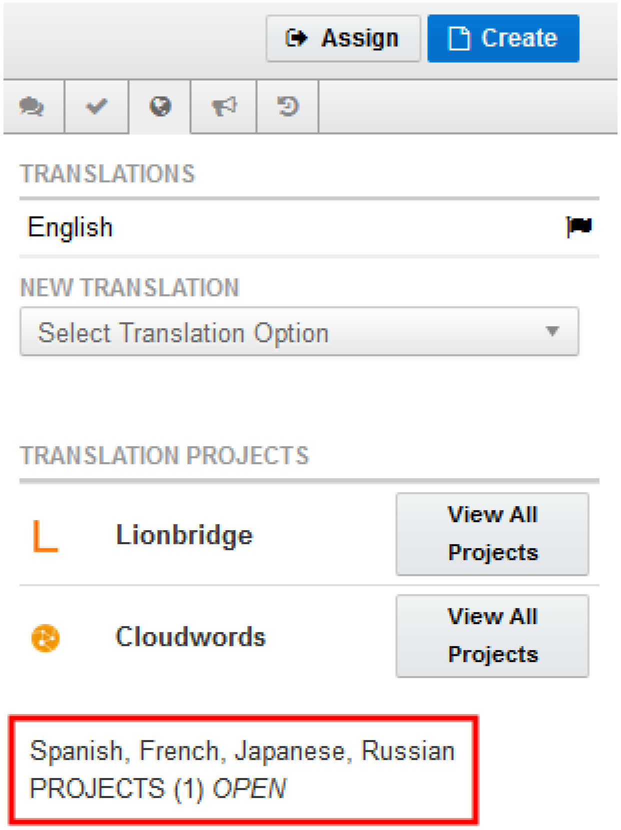


8. A message will appear confirming the save was successful. Once the save is complete, the asset is automatically sent to Cloudwords.

9. Click **Close**.

Now that the asset has been sent to Cloudwords, the user will manage the remainder of the project workflow from within Cloudwords.

You can verify the asset was sent to Cloudwords using the *Translate Content* panel. The *Translate Content* panel will display all active projects where the asset is included. Your newly created translation project will appear, with a status message of “OPEN”.



5.4 GaggleAMP

GaggleAMP is a social marketing platform that allows companies to build advocate networks of employees, customers and / or vendors to amplify their marketing messages for more traffic, leads and social media interactions. Marketers can leverage GaggleAMP within their Oracle Content Marketing solution to make content assets available within GaggleAMP for promotion.

Content assets are promoted to GaggleAMP as a message suggestion. Once promoted successfully, the suggested message is managed within GaggleAMP.

Note: This feature must be enabled by an Administrator in the License Configuration menu.

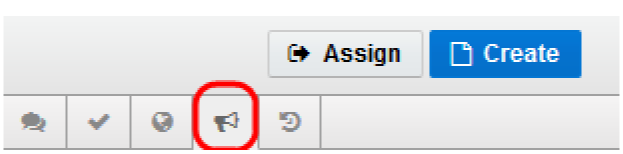
5.4.1 Promoting content via GaggleAMP

You can promote content assets to GaggleAMP to send your content to a Gaggle. Gaggles are communities of users who are provided a set of pre-packaged, suggested messages to share to their social media accounts. This allows multiple users to partake in a company's online marketing activities, by sharing your brand's pre-packaged messages to the social networks of users. GaggleAMP enables your content to be shared by anyone within a Gaggle, which can include a marketing company's employees, or any other member within the Gaggle.

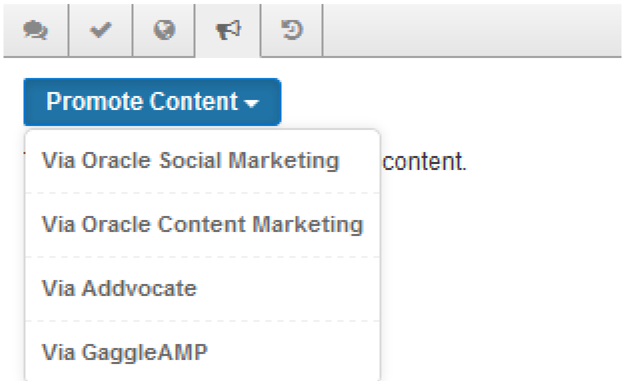
Note: This feature must be enabled by an Administrator in the License Configuration menu.

To promote an asset to GaggleAMP:

1. Navigate to **Collaboration** > **Library**.
2. Click the **Promote** tab.

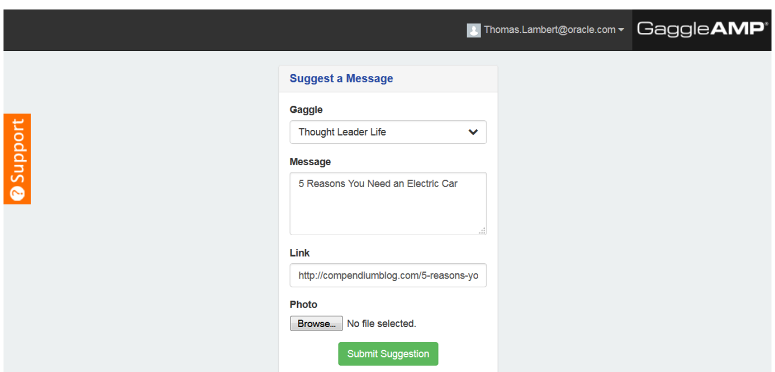


3. Click **Promote Content** > **Via GaggleAMP**.



4. You will be prompted with a login screen for GaggleAMP. Enter your credentials and click **Sign In**.

5. A Gaggle window opens to configure your Gaggle message.

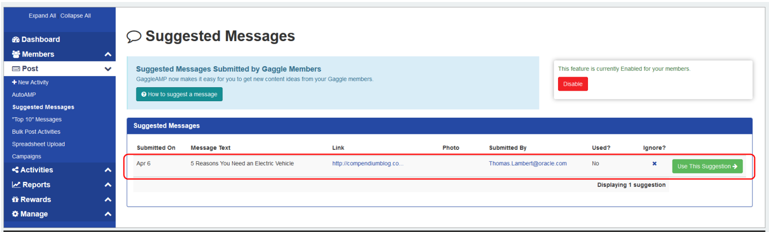


Configure the message:

- **Gaggle**: Select the Gaggle to use to promote the message.
- **Message**: Enter a customized Gaggle message. By default, the content asset title will be entered in GaggleAMP as the Gaggle message.
- **Link**: The URL for the published asset will be displayed.
- **Photo**: Select a photo for the message.

6. Click **Submit Suggestion**.

Your message suggestion is sent to the Gaggle within GaggleAMP.



5.5 Lionbridge app

Create translation projects to send your content to Lionbridge to be translated, powered by Lionbridge's Clay Tablet connector.

Marketers can send content to be translated to the following Lionbridge systems supported by the Clay Tablet connector:

1. Freeway
2. onDemand

The translation process follows a simple workflow:

1. Users add assets to a new, or existing translation project.
2. The project and all contained assets are submitted to Lionbridge.
3. Projects (the equivalent item in Lionbridge technology may be referred to as Jobs or Orders) are reviewed, and quotes requested as necessary in the Translation System.
4. Once the content is finalized in the Translation System, it is automatically sent back to Oracle Content Marketing.

5.5.1 Configuring the Lionbridge app

In order to use the Lionbridge app in Oracle Content Marketing to send content to Lionbridge to be translated, it must first be configured. The configuration process follows:

1. Obtain an API Key from Lionbridge
2. Obtain an Access Token from Lionbridge
3. Configure the Lionbridge app in Content Marketing

Additionally, an administrative user can generate their own access token to begin testing.

Requirements

- The **Manage App Configuration** right within Content Marketing. See Rights & Roles.
- Username and password for an Administrator account of your Lionbridge system that will be used to configure the Lionbridge app.

Obtaining an API Key from Lionbridge

Prior to configuring the app in Content Marketing, you will first need an API Key from Lionbridge. This API Key is needed to obtain an Access Token.

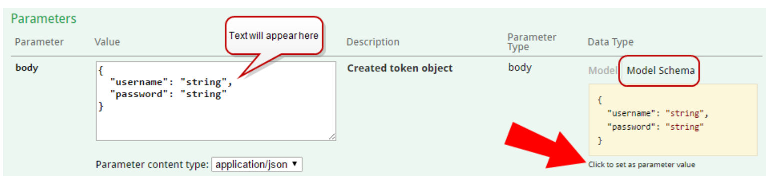
To obtain an API Key:

1. Follow the instructions on the Clay Tablet REST API Getting Started page.
2. An email will be sent to you confirming you can now proceed with the “Obtaining an Access Token” step below.

Obtaining an Access Token

To obtain an Access Token:

1. Navigate to the Clay Tablet Developers site at https://developers.clay-tablet.net/.
2. On that website select **API Reference**, click **Token** and click on the **/oauth2/token** endpoint to expand the information.
3. A new section of the screen opens below. Under *Parameters* click the yellow box labeled **Model Schema**. This will automatically populate an example of the code that is needed in the **body** text box on the left, with placeholder text labeled 'string' as each of the values.

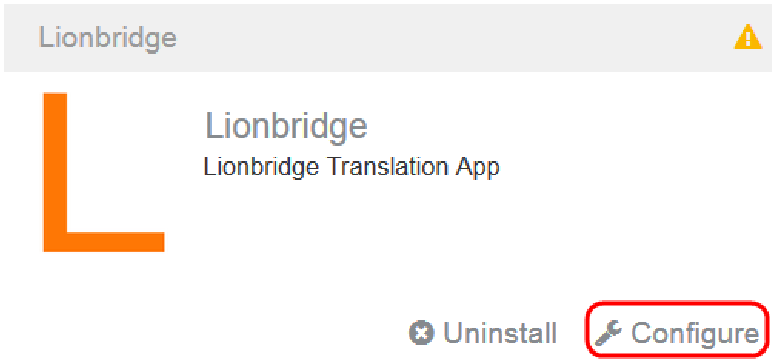


4. For **username**, enter your username in place of ‘string’ between the two quotes.
5. For **password**, enter your password in place of ‘string’ between the two quotes.
6. Click *Try it out!* and an Access Token will automatically generate under *Response Body*. This is the key that you need to finish the app configuration in Content Marketing.

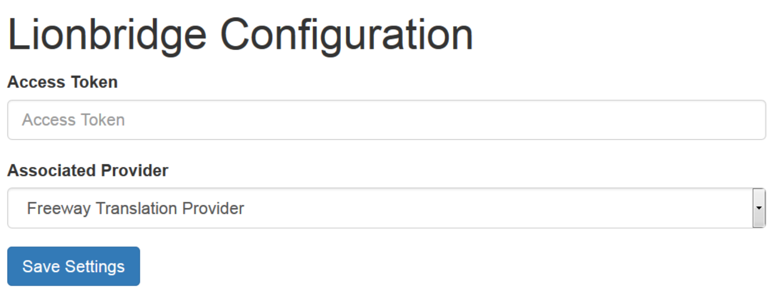
Configuring the Lionbridge app in Content Marketing

To configure the Lionbridge app:

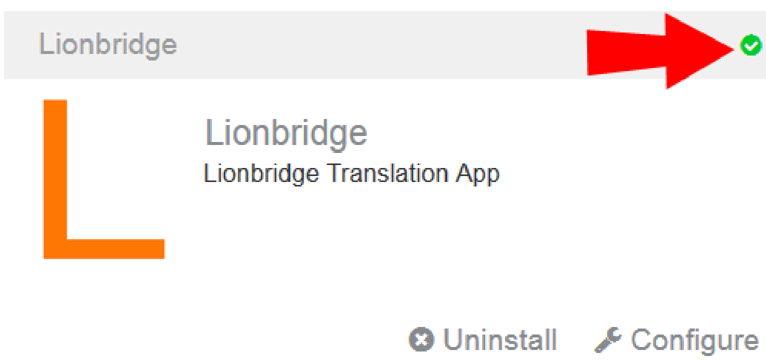
1. In Content Marketing, navigate to **Settings** > **App Configuration**.
2. Find the Lionbridge app and click **Configure**.



3. Use the Clay Tablet Access Token you obtained in the above steps to configure the Lionbridge app.



4. Click **Save Settings**.



Clay Tablet will automatically understand the credentials supplied to know which Lionbridge platform it should connect to. Your app is now successfully configured and ready for use.

5.5.2 Creating translations using the Lionbridge app

The Lionbridge app makes it easy for marketers to request translated content from any one of Lionbridge's translation tools. When content has been translated, it is automatically sent back to Content Marketing for a final workflow review prior to distribution.

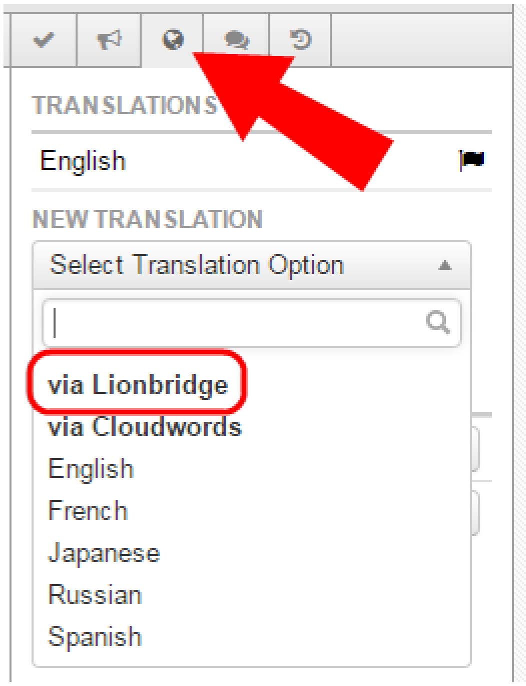
This document will step you through the flow to end to end flow of sending content to Lionbridge.

Prerequisites

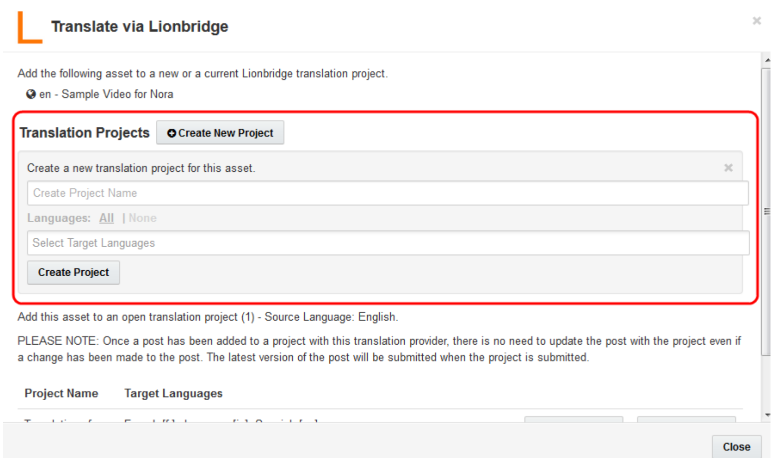
- A configured Lionbridge app.
- Content Languages configured with the correct language codes from Lionbridge. See Content Languages for information on configuration of Content Languages.

To create translations:

1. Navigate to **Collaboration** > **Library**.
2. In the Content List, select the content asset to send off for translation.
3. Click the **Translate Content** panel.
4. From within the panel under **New Translation**, select **Translation Option** > **Via Lionbridge**.



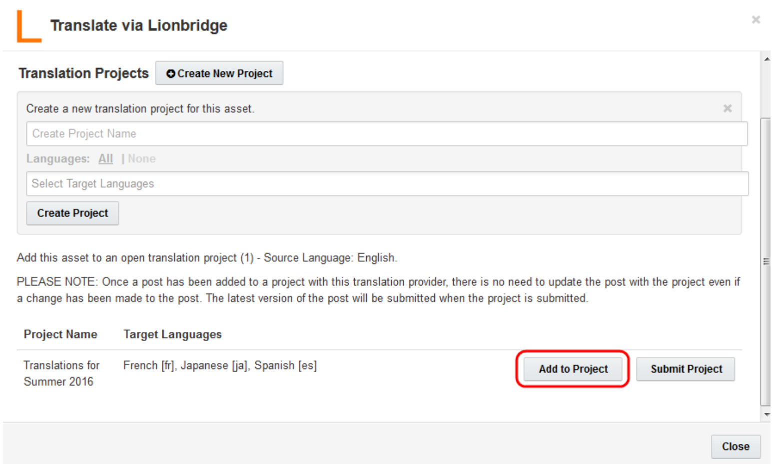
5. Click **Create New Project** and enter the project details.



- **Create Project Name**: Enter a name for the translation project.
- **Select Target Languages**: Select the content languages you want to translate the asset to. You have the option to select all or remove all defined languages added to a project. If you do not see the desired content language, see Content Languages to learn more.

6. Click **Create Project**. Your project will now appear in the list below of all active Lionbridge projects.

7. Find the project you just created and click **Add to Project** to add the content asset to the new translation project.



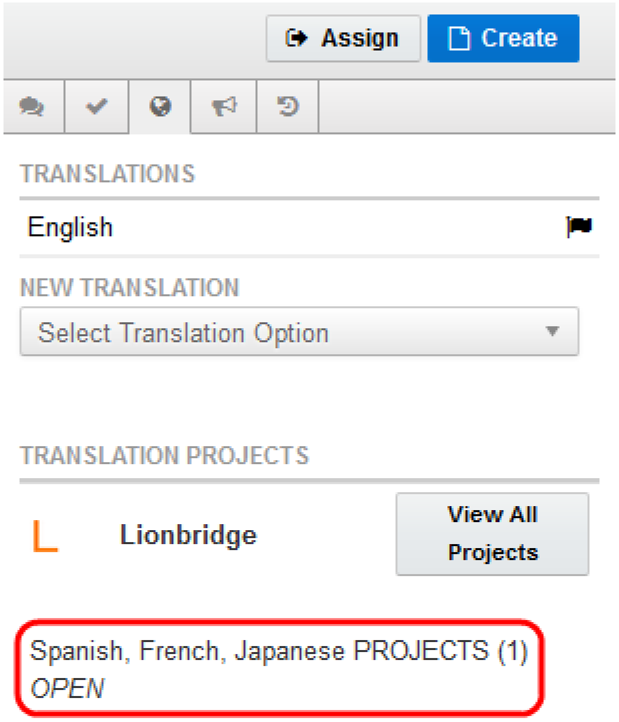
8. A message will appear confirming the asset was successfully added to the project.

9. Once your project contains all assets that will be translated, click **Submit Project** to send the assets through Clay Tablet off to the appropriate Lionbridge application. You must click **Submit Project** to send the project to Lionbridge.

10. To exit out of the modal, click **Close**.

Now that the asset has been sent to Lionbridge, you must manage the remainder of the project workflow from within Lionbridge.

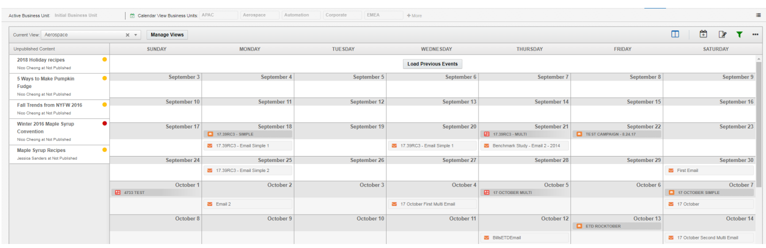
You can verify the asset was sent to Lionbridge using the Translate Content panel. The Translate Content panel will display all active projects where the asset is included. Your newly created translation project will appear, with a status message of “OPEN”.


Assign
Create
TRANSLATIONS
English
NEW TRANSLATION
Select Translation Option
TRANSLATION PROJECTS
Lionbridge
View All Projects
Spanish, French, Japanese PROJECTS (1)
OPEN

6 Calendar

The marketing calendar provides a management tool to help manage your marketing activities by providing insight into planning visibility.

Marketing teams can use the calendar to create visibility into all marketing functions. The marketing calendar will display all marketing themes and projects, custom entries to cover all other marketing initiatives, as well as the content planned to support those initiatives.



There are two versions of the Oracle Marketing Calendar. The free lightweight version of the calendar is available to all Eloqua users, while a more advanced, feature rich version of the calendar is available to purchase and comes with a license of Oracle Content Marketing. Contact your account manager to learn more about purchasing this upgrade.

Refer to the chart below to learn about the differences between the calendars.

Feature	Free Calendar	Pro Calendar
Eloqua Campaigns		
Eloqua Emails		
Campaign Information *Including CRM Campaign ID* *and Segment name*		

Feature	Free Calendar	Pro Calendar
Creation of Shared Views		
Custom Entries *Tracking for events like* *Webinars & Conferences*		
Editorial Calendar		
Filtering Entries		
Creating & Tracking Projects		
Social Promotions		

For more information on how the calendar displays Eloqua data, see the Oracle Eloqua Help Center.

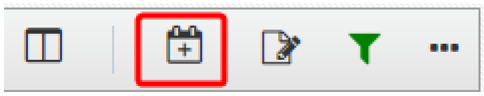
Learn more: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

6.1 Creating custom calendar entries

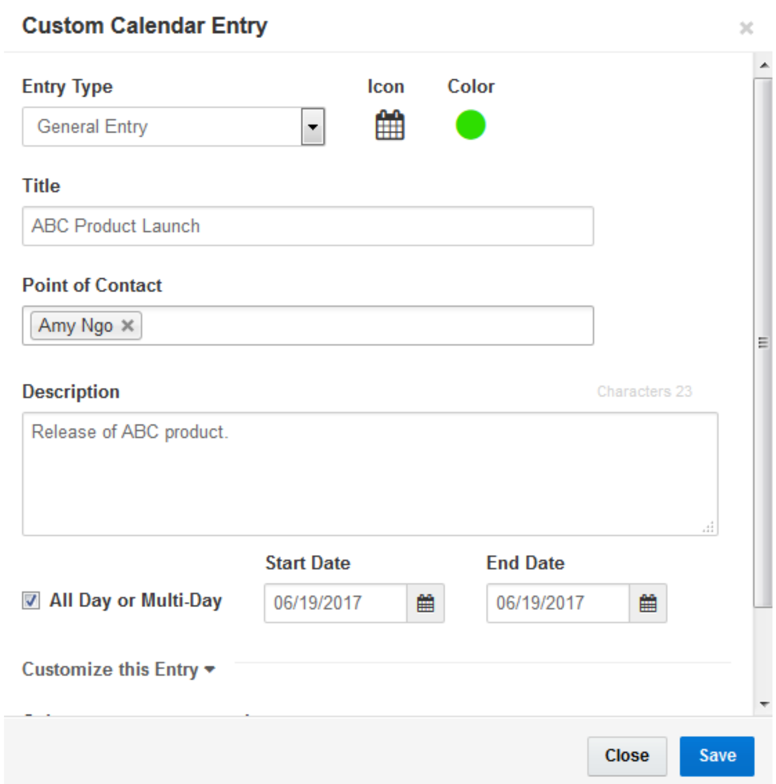
You can create custom calendar entries to give you the flexibility to track any number of marketing initiatives, including annual marketing themes, campaigns for product launches, or lead generation activities such as webinars and conferences. The **Manage Calendar Settings** right is required to create custom calendar entries. See Managing user rights for more information.

To create a custom calendar entry:

1. Navigate to **Planning** > **Calendar**.
2. Click **Create a custom entry**.



3. Complete the fields as appropriate.



- **Create in Business Unit**: The current actively viewed Business Unit is displayed. Click the drop-down to select a different Business Unit to create the custom calendar entry type in. Note that if you are using a view, the selected Business Unit must be included within your current active calendar view for the custom calendar entry to display. See Business Units for more information.

Note: This option is only available in multi Business Unit licenses.

- **Entry Type**: Select an entry type. See Creating custom calendar entry types for more information.
- **Title**: Enter the name of the entry.
- **Points of Contact**: Select one or multiple Points of Contact that should be considered the go to for additional information on a marketing initiative.
- **Description**: Enter a description of the entry.

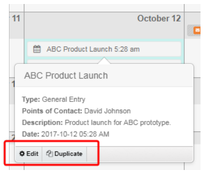
Example: Descriptions may include: information from a creative brief, details on a marketing theme, links to systems of records containing information about the entry.

- **All Day or Multi-Day**: Option to choose if this entry will be a single day entry, or an entry that will last longer than one full day.
- **Time**: Specify the date and time this entry will happen. This option is only applicable if the entry is not an **All Day or Multi-Day** entry.
- **Start Date** / **End Date**: Specify the start and end date for the entry. This option is only applicable if the entry is an **All Day or Multi-Day** entry.
- **Customize this Entry**: Click to customize this entry to differ from the entry type defaults.
  - **Icon**: Select an icon that will best represent the entry.
  - **Color**: Select a color for the entry. Specifying different colors for entries will help differentiate marketing entries in the calendar as well as allow users to easily scan the calendar for information.

4. Click **Save**.

The custom entry is created.

When you click to view a summary of the entry, you have the option to edit or duplicate.



Duplicating an entry will create a new custom calendar entry with the Entry Type, Title, and Point of Contact data from the existing entry. Rename the new entry and edit the event information before clicking **Save**.

For licenses using Business Units, note that custom entries are copied within the Active Business Unit. Entries are not duplicated across Business Units.

6.2 Creating custom calendar entry types

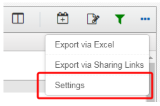
Create custom calendar entry types to define a re-useable set of custom entries. Create entry types to track a variety of marketing initiative events and reuse these types as needed. Defined entries can also be shared across Business Units, to help marketers work towards consistent patterns of usage across teams while maintaining a consistent visual display on the calendar. The **Manage Calendar Settings** right is required to create custom calendar entry types. See Managing user rights for more information.

> **Example**: Create specific entries like "Webinars" to make the creation of webinar entries for all users quicker, while maintaining consistency on the calendar.

To create a new re-useable entry type:

1. Navigate to **Planning** > **Calendar**.

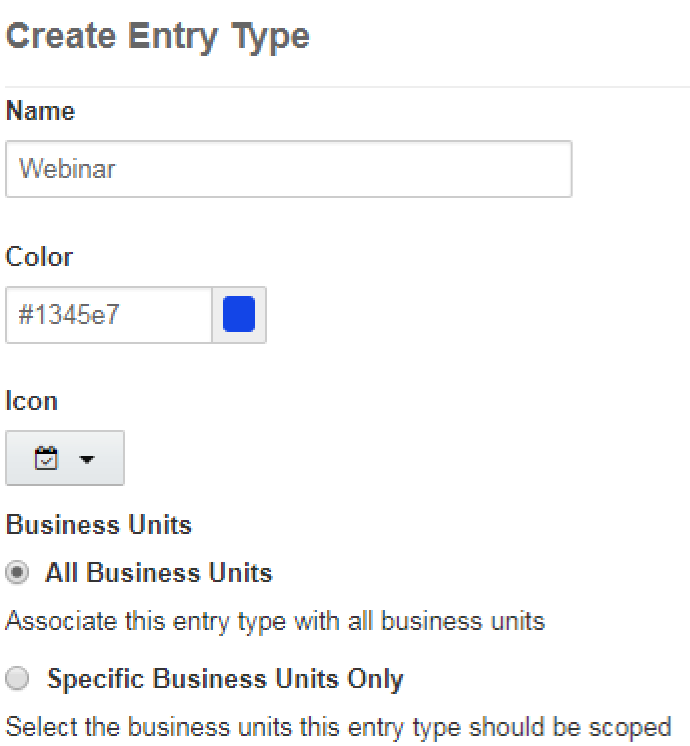
2. Click **Calendar Settings**.



3. The **Calendar Settings** dialog (*Entry Types* tab) displays the Entry Types created.

4. Click **Create**.

5. Complete the fields as appropriate.



- **Name**: Enter the name of the entry type.
- **Color**: Enter or select the default color of the entry type.
- **Icon**: Select a default icon that best represents the entry type.
- **Business Units**
    - **All Business Units**: Select to allow all Business Units to access this entry type.
    - **Specific Business Units Only**: Select to limit this entry type to specific Business Units. Select the Business Units this entry type will be applicable to.

> **Note**: This option is only available in multi Business Unit licenses.

6. Click **Save**.

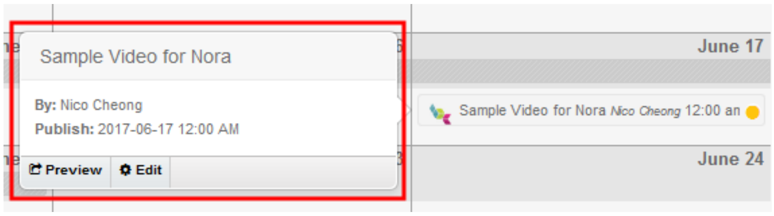
The new entry type appears in the *Calendar Settings* dialog.

6.3 Viewing content in the calendar

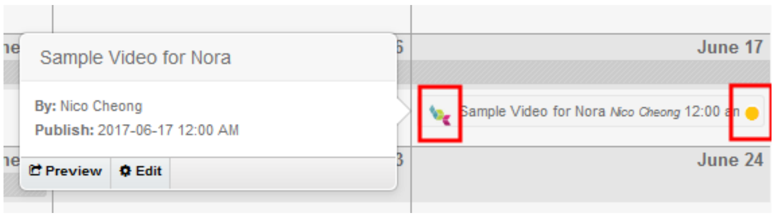
The marketing calendar enables you to track content assets at all stages of workflow. You can also customize the content displayed by filtering for the criteria you want to see. Navigate to **Planning** > **Calendar** to access the calendar.

6.3.1 Viewing and editing content in the calendar

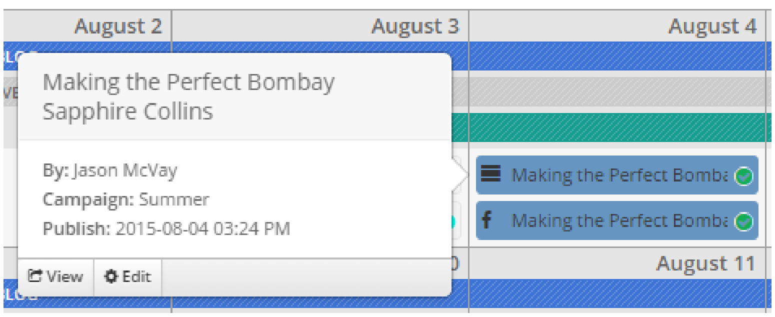
When viewing content assets in the calendar, entries will display: the author and publish date, as well as options to preview or edit the content asset.



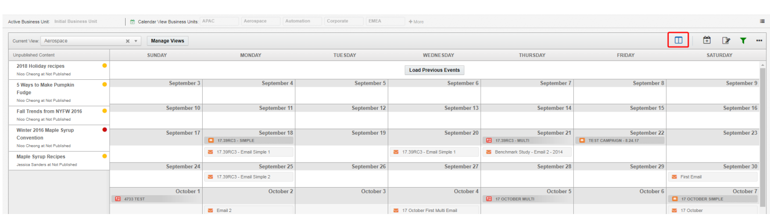
Additionally the content asset's content type and current workflow stage are displayed.



You can also view past and upcoming social promotions pushed from native social integrations (Facebook, Twitter, LinkedIn) via Oracle Content Marketing.

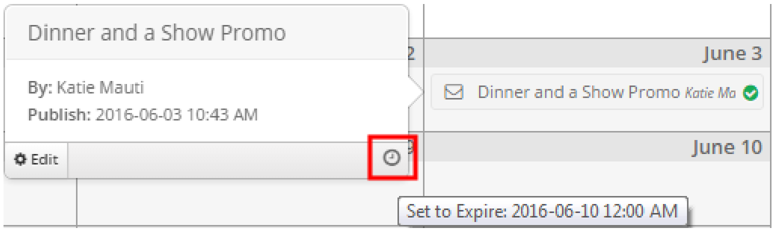


You can click the pane icon to hide / show a panel containing a list of unscheduled content.



6.3.2 Viewing expiring content in the calendar

Assets set to expire will display an Expiration icon on the Calendar.

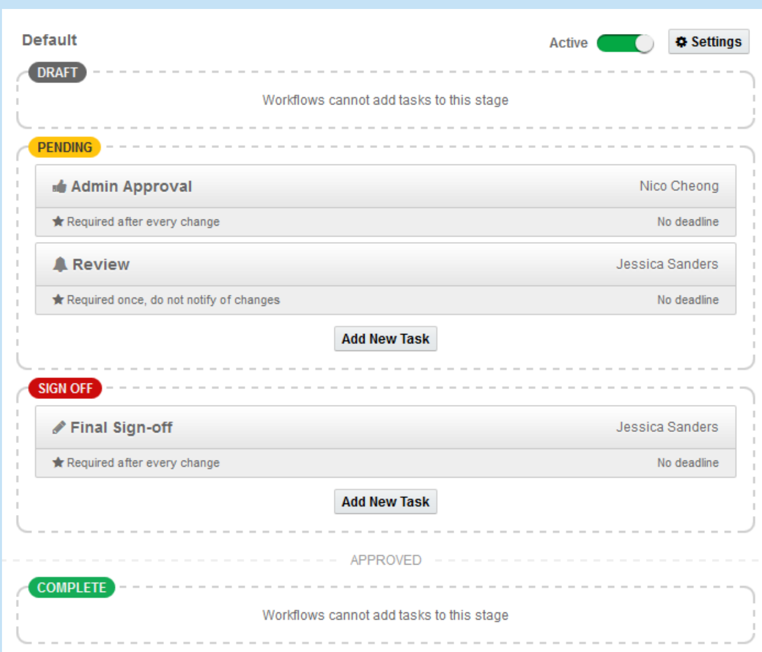


6.3.3 Viewing content assets in workflow

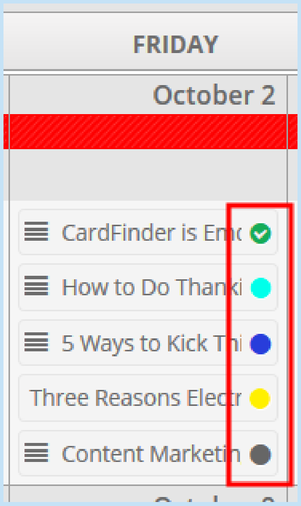
The marketing calendar displays content in all stages of workflow. The colour of the circle within the asset corresponds to the workflow stage colour.

You have the freedom of customizing workflow stages to visually differentiate workflow stages from each another. For more information, see Workflows.

Example: The following workflow was configured with five workflow stages.



The workflow stages of content assets in the calendar are easily identifiable because of their corresponding colors.

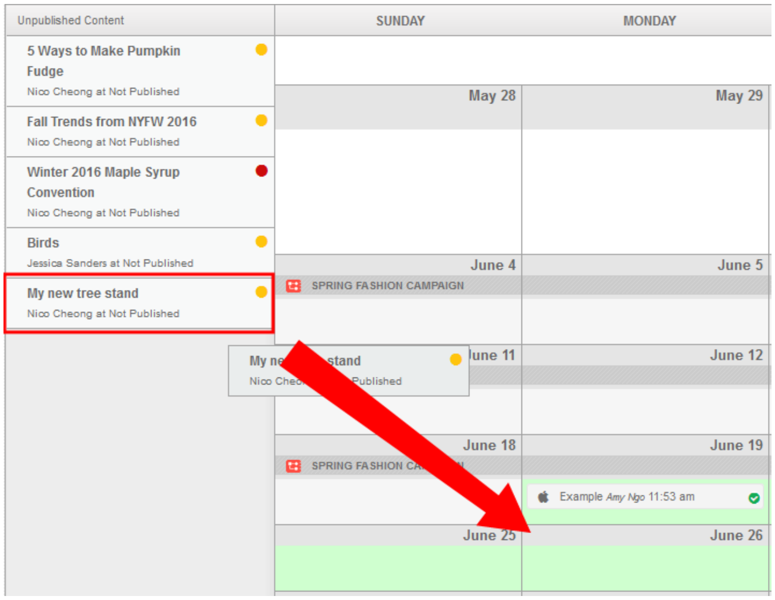


6.3.4 Scheduling unpublished content

Schedule and update content publish dates by dragging-and-dropping content within the calendar. You can drag-and-drop two types of content:

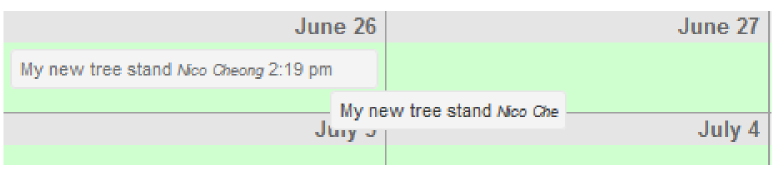
a. **Unpublished content from the *Unpublished Content* pane**

   Content appears here because a publish date has not been set. To set a date, drag unpublished content from the **Unpublished Content** pane and drag it onto a date in the calendar.



b. **Unpublished content in the calendar**

It is common that marketers need adjust the publish dates for content assets as campaigns, events, and other priorities change. Assets that have not been published can be easily moved in the calendar, and the schedule publish date for that assets will change accordingly. To change the scheduled publish date for an asset, drag a the asset from one date to another



6.4 Viewing other entries in the calendar

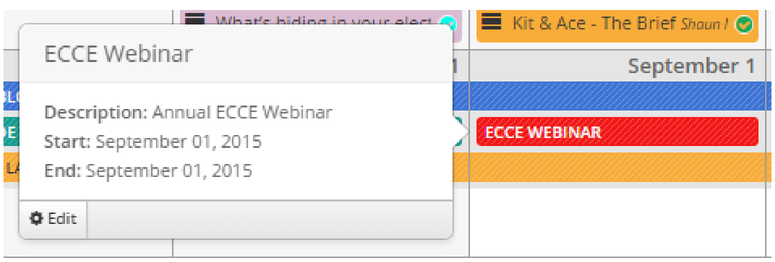
The marketing calendar helps you manage your content strategy and consistently generate quality content by providing a view of all content, ongoing projects, social promotions, custom entries, and Eloqua campaigns and emails. Use the marketing calendar to view various content and events.

6.4.1 Viewing projects

View on-going projects to gain insight on the campaign, or promotion that you are running. Click hyperlinks in project descriptions to view external content related to projects.

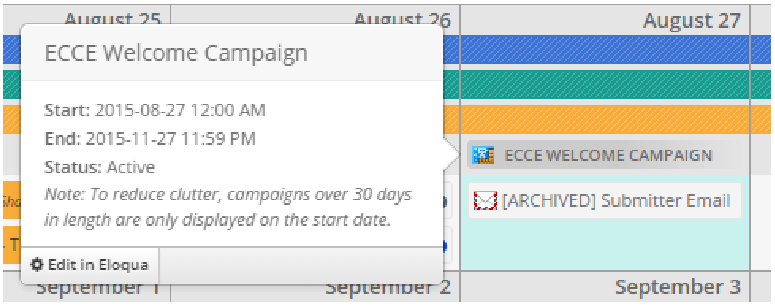
6.4.2 Viewing custom entries

View all other marketing activities by creating custom entries. Examples can include events such as webinars, conferences, and product launches.



6.4.3 Viewing Eloqua campaigns and emails

View and track your Eloqua campaigns and scheduled emails from the calendar if you have an Eloqua linked account. To learn more about what Eloqua asset data displays in the calendar, view the Oracle Marketing Cloud app documentation.

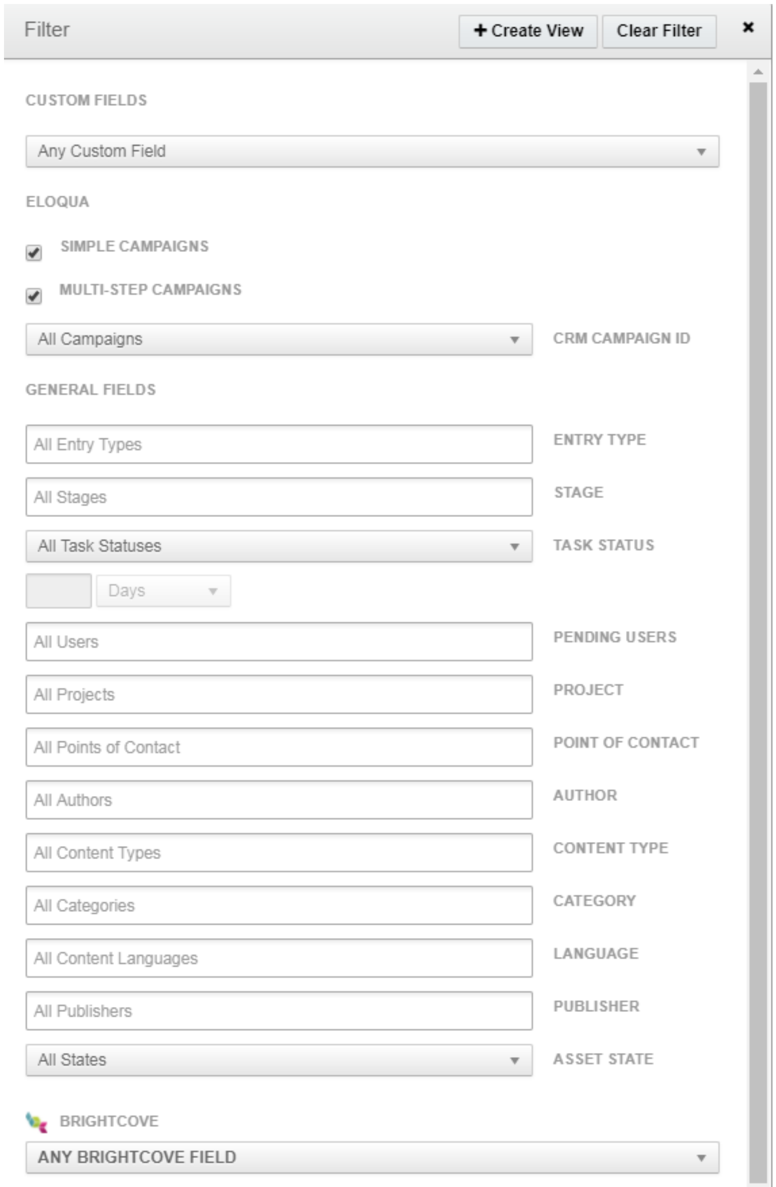


6.5 Filtering the calendar

By clicking the **Filter** button in the top-right hand corner of the calendar, you will be able to filter content and events to better understand and manage your content strategy. If you often need to filter the calendar with a specific set of filter criteria, a user with sufficient rights can create a view to save your filter criteria for another time.

To filter the calendar:

1. Navigate to **Planning** > **Calendar**.
2. The **Filter** button appears in the top-right corner. Click to view and select filter options.



3. Options exist to manage the current filter configuration, or save a configuration for re-use. Options available include:

   - **Save Filter**: Click to save the filter selection with a unique name.
   - **Manage Filters**: Click to manage your saved filters.
   - **Clear Filter**: Clears the filter selections made.

4. Select a filter option:

Custom Fields

- **Custom Fields**: Choose from any custom fields to specify additional filter criteria.

Eloqua

- **Simple Campaigns**: Select the checkbox to display Eloqua simple campaigns and their associated emails.
- **Multi-Step Campaigns**: Select the checkbox to display Eloqua multi-step campaigns and all emails associated with those campaigns.
- **CRM Campaign ID**: Specify how the calendar should display campaigns where a CRM ID exists. You can select **All Campaigns** to view all campaigns (regardless of whether or not the campaign has an associated CRM ID), or you can view **Campaigns with ID** and **Campaigns without ID**.

General Fields

- **Entry Type**: Filter entries by entry type by toggling entry types on or off. You can filter Custom entries, System entries such as projects, and Social Promotion entries.
- **Stage**: Filter assets by current workflow stage.
- **Task Status**: Use this filter option to find content with active tasks that will be due soon, or are overdue. Users have two options at their disposal:
    - **Due Within**: This option will return content with active tasks that will be due soon. To use this option choose a date range, either Day or Month, and enter a number for the appropriate duration.

      This filter will return any results for the remainder of the current day plus the duration entered. Let's say for example at 3:00pm I search for all content with active tasks that are Due Within 3 days. This filter configuration will return content with active tasks for the remainder of the day after 3:00pm as well as the next three full days.
    - **Past Due Up To**: This option will return content with active tasks that are overdue. To use this option choose a date range, either Day or Month, and enter a number for the appropriate duration.

This filter will return results any results for the current day plus the duration entered. Let's say for example at 3:00pm I search for all content with tasks that are Past Due Up To 3 days. This filter configuration will return all content with active tasks past due for the current day up to 3:00pm, as well as the previous three full days.

- **Pending User**: Filter assets that are pending approval in workflow by specific user.
- **Project**: Choose to show one or more of your existing projects.
- **Point of Contact**: Choose the Point(s) of Contact you want to filter on. Points of Contact are assigned when creating a custom calendar entry.
- **Author**: Choose from any of your authors, or All Authors.
- **Content Type**: Choose a content type in your license, or **All Content Types**.
- **Category**: Choose from any of your categories.
- **Language**: Choose from any languages that have been defined for tagging content assets.
- **Publisher**: Choose a publisher.
- **Persona**: Choose from any of your personas.
- **Engagement Stage**: Choose an engagement stage.
- **Asset State**: Choose an asset state. See Expiring content assets for more information.
- **Brightcove**: Filter Assets from a selection of Brightcove fields including:
  - Video Name
  - Player Name
  - Player ID
  - Video ID
  - Tags (If configured in App settings)
  - Short Description (if configured in App settings)

5. Options exist to manage the current filter configuration, or save a configuration for re-use. Options available include:

- **Save Filter**: Click to save the filter selection with a unique name.
- **Manage Filters**: Click to manage your saved filters.
- **Clear Filter**: Clears the filter selections made.

The calendar will display data based on your filter criteria.

6.6 Creating a calendar view

Calendar views can be setup to display only the most relevant information on the calendar for another user. Views are a great way to display a subset of data that is relevant for a division, line of business, or particular stakeholder. After a view is created it can be shared within your organization. Share views with other users within the application or publicly with other stakeholders that will never be active users within Content Marketing.

Create calendar views to share a view of the marketing calendar with users outside of Content Marketing. You can specify whether or not a view is Private or Public, and restrict access to the view using IP Policy Restrictions and Embed Policy Whitelisting.

> **Example**: You might want to create a view that provides visibility into all content and events that support a particular product release.

Views are created by setting up a series of filters on the calendar, and saving those filters as a view. For customers who are collaborating across divisions or groups within their organization using the Business Units feature, views can also span across more than one Business Unit.

Views can be created using one of two methods:

- **From the Filter (Best Practice)**

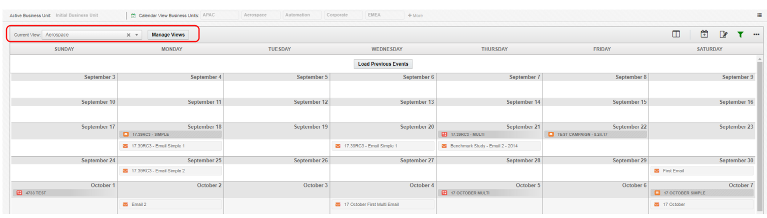
  Open the filter on the calendar, select your filter options and click **Create View**. This method allows users to preview how a view will appear before saving and sharing that view with others.

- **From within the Settings menu**

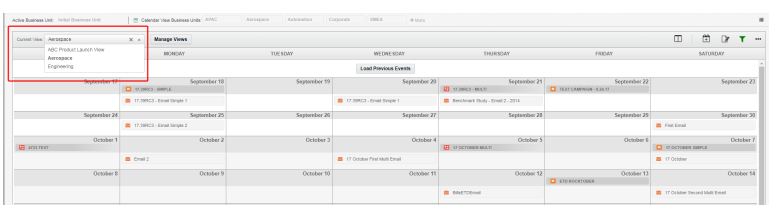
  Click **Manage Views** to access the settings for managing and creating new views. Users can also access this screen by clicking the **Settings** icon from the calendar. See Configuring calendar settings for more information about the Calendar settings page.

Views available to a user will display as a drop-down menu on the left side of the calendar. A calendar without views configured, or a user who does not have access to any saved views will continue to see all items on the calendar. Views respect individual user rights, only displaying the entries that a given user has access to see.

Calendar view containing all entries



Calendar with multiple views available to use

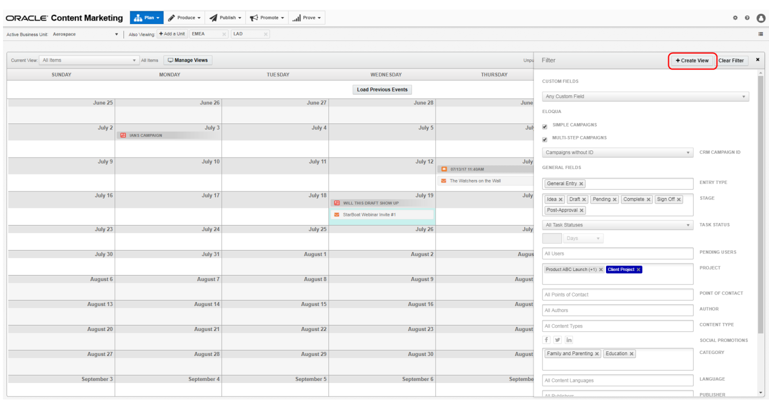


Prerequisites

- To create a calendar view to be used by a single user, no special rights are required. The **Manage Calendar View Access** right is required to share views with other users and perform administrative duties on views. See Managing user rights for more information.

From the Filter - Create a calendar view:

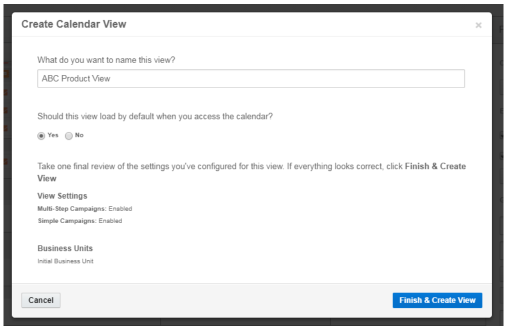
1. Navigate to **Planning > Calendar**.
2. Click the filter button to filter the calendar. Configure the options in the filter according to the view you want to create.
3. Preview the resulting data on the calendar to ensure the filter criteria is correctly displaying the most relevant data for a view.
4. Click **Create View**.



5. Follow the configuration options available in the modal to create your view.

For users able to create views for themselves:

i. Give the view a meaningful name and then decide whether or not the view should load by default. Users have the option to choose whether they would like to have a default view load when accessing the calendar. Default views can be modified at any time from within the Calendar Settings.



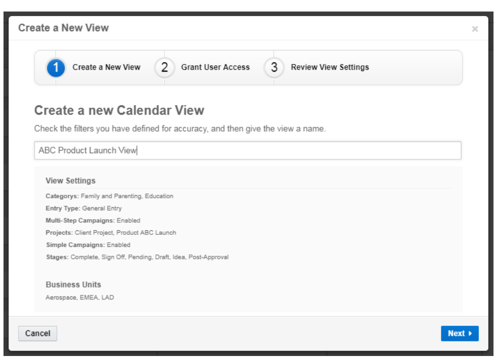
ii. Finally - You will see an itemized list of the setting you have chosen for this view. Review the view's settings and if everything is correct, click **Finish & Create View**.

For users able to create and share views:

A wizard will display with a quick, three step process leading users through creating and sharing a view. The three steps are:

- **Step 1**: Create a New View - Review your view settings, and give your view a name.
- **Step 2**: Grant User Access - Assign users who should be able to access this view.
- **Step 3**: Review View Settings - Choose whether this view should be set as the default view that a user sees when they access the calendar.

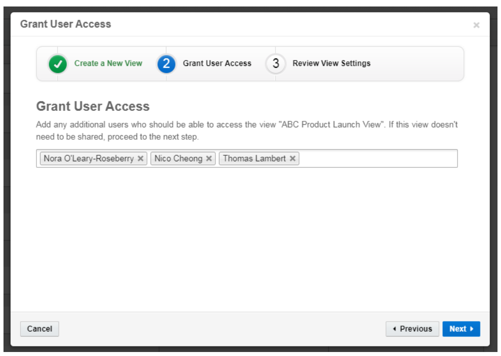
i. **Step 1** - Give the new view a meaningful name. As a double confirmation, review that the settings you’ve chosen for the view are correct - then click **Next**.



Note: This particular view spans across more than one Business Unit, indicated in the summary information within the screenshot as Aerospace, EMEA, and LAD.

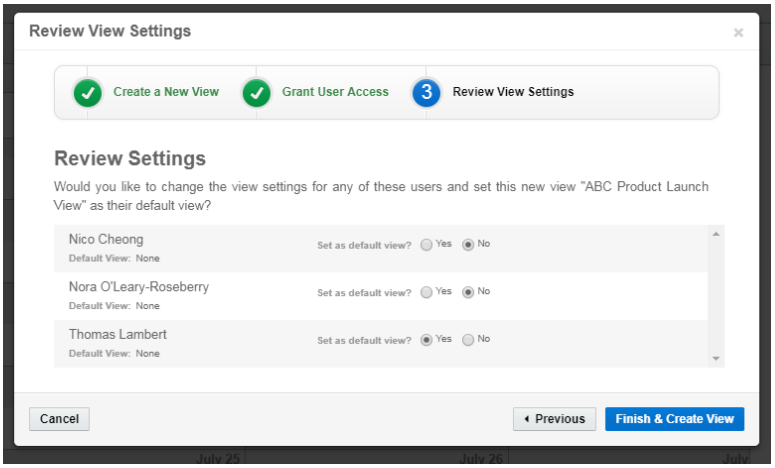
Business Units are a premium feature, see Business Units for more information and talk to your account manager for more information on how to enable Business Units in your license.

ii. **Step 2** - Enter the names of any additional users who should be able to access this view, and click **Next**.

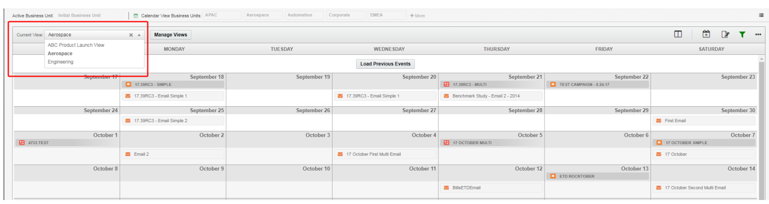


iii. **Step 3** - Decide if you want this new view to be set as default view for any of the selected users. A view set as default will load by default when a user accesses the calendar, particularly useful for users who need to be informed about marketing activities, but will not have a need to access the calendar on a daily basis. Users can manage their own view settings and can modify which view is set to default at any time.

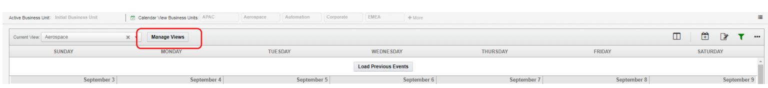
Finish creating your view by clicking **Finish & Create View**.



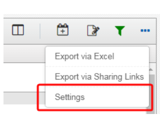
The new view is created. You can click the **View** drop-down to start using the new view.



Additionally, a **Manage Views** button will appear that will allow you to manage the settings of all of your existing views.



Alternatively - you can also click the **Calendar Settings** button to manage your calendar views. The Settings page is also where you'll specify the access settings for the view, including settings for whether the view is Public or Private. For more information, see Configuring calendar settings.



6.7 Choosing a default calendar view

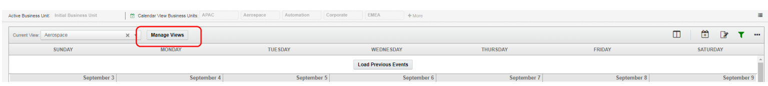
All users can set a default calendar view. A default calendar view is a pre-configured view of the calendar that is loaded when the user accesses the calendar. Each individual user can set their own default view, or an administrator can set a default view on a user's behalf.

Administrators should review the Calendar Settings documentation for an overview of administering settings for the calendar including configuring default views for all users.

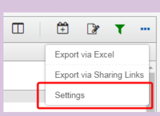
To choose a default view:

1. Navigate to **Planning** > **Calendar**.

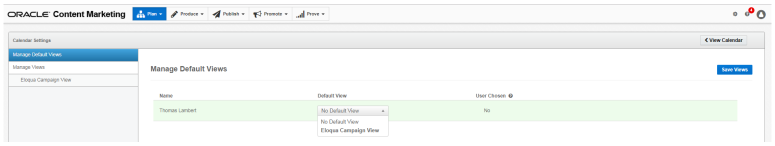
2. Click **Manage Views**.



Tip: You can also click the Calendar Settings button to manage your calendar views.



3. Click **Manage Default Views**. The Manage Default Views page opens.



4. Click the drop-down to select the view to make the default.

5. Click **Save Views**.

The new view will be loaded by default when viewing the calendar.

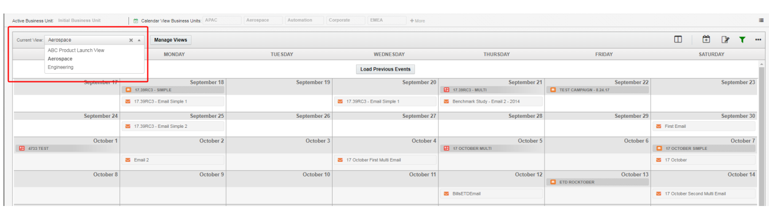
6.8 Using a calendar view

You can use a calendar view to change the content, events, or data viewed in the calendar.

When a user accesses the calendar, their default view will load automatically. If no view has been set as default, all items will display on the calendar that are available for the user to view.

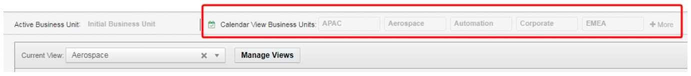
To use a calendar view:

Click the **View** drop-down list and select a view.



The calendar will display entries based on the filter criteria selected within the view. Open the filter to view what options have been configured for your view. Some users may want to use the view settings as a base to add / delete options for one time usage or to build another view variation with modified options.

For licenses with Business Units, when a calendar view is active, the Business Units included with the view are displayed.



Administrators have permissions to set a default calendar view for users within a license. View the Calendar Settings documentation for more information.

6.9 Sharing the calendar

You can share the calendar with users outside of Content Marketing to provide visibility of all marketing activities in an easily accessible way with different parts of your organization. You can share the calendar in multiple ways:

- Sharing a View Link (any employee can view the calendar).
- Allowing users to import calendar data using an iCalendar file, viewing marketing activities in their calendar of choice like Google, Outlook, or Mac.

6.9.1 Sharing a Calendar view link

Prerequisites

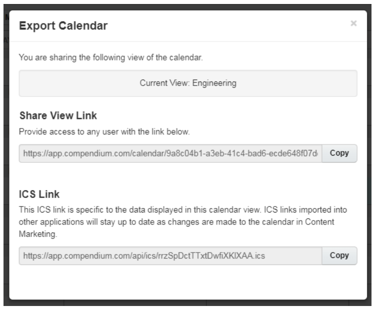
- A calendar view with the correct access settings enabled.

To share a calendar view link:

1. Navigate to **Planning** > **Calendar**.
2. Choose a view from the drop down on the left.

3. Click **View more options** > **Export via Sharing Links**.

4. Your current calendar view is noted at the top for reference. Under *Share View Link*, click **Copy**. The URL to your calendar will be copied to your clipboard.



5. Share the URL within your organization. Common use cases would include embedding the calendar in another portal, or having specific employees bookmark the link for direct access.

Tip: Administrators may want to enable employees to share a calendar view as needed. The **Allow this link to be shared by any user** option within the view settings will display Calendar View Link in the share dialog.

Sharing via ICS links

When sharing the calendar using an iCalendar (ICS) link, users are provided a URL to an iCalendar file which includes all of the data configured for a view. Subscribing to this iCalendar file will ensure your third-party calendar is automatically updated with new data when updates are made in Content Marketing.

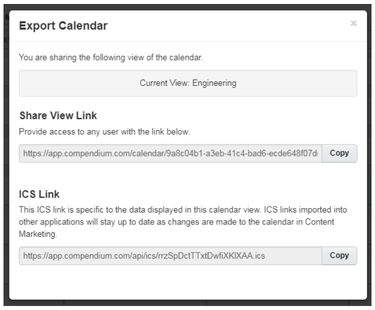
To get an ICS link for a calendar view:

1. Navigate to **Planning** > **Calendar**.

2. Choose a view from the drop down on the left.

3. Click **View more options** > **Export via Sharing Links**.

4. Your currently selected calendar view is noted at the top for reference. Under *ICS Link*, click **Copy**. The URL to your calendar will be copied to your clipboard.



> **Note**: If the user subscribes to a calendar using the copied link, the calendar will update. Users can load the .ics link in a browser and download a file, however an uploaded file will only contain a snapshot of the data at the time it was downloaded and will not stay in sync.

Now you can use the ICS link to import data into local Calendar application.

At any time, administrative users can reset existing URLs for a view - typically used when revoking user access to a particular view. See Configuring calendar settings for more information.

6.10 Exporting calendar data to Excel

You can export the calendar to an Excel file to promote visibility within an organization, and assist with reporting.

Exporting to Excel

When choosing to export data from the editorial calendar, a user can set a date range to select all data in the calendar for that date range. If a user would like to export only select portions of data, the calendar export will check for any active filter settings and filter the data based on those settings.

An .xls workbook export will be created that may contain multiple worksheets. The worksheets and data broken down by worksheet include:

- **Summary**
- **Content Assets**

  Data included in the worksheet: Title, Content Type, Category, Stage, Active Task, Publish Date, Expiration, Is Live, Publisher, URL, Author, Project, Persona, Engagement Stage, and Custom Field Data
- **Projects**

  Data included in the worksheet: Name, Start Date, End Date, and Description
- **Custom Entries – Specific Time**

  Data included in the worksheet: Name, Description, and Date
- **Custom Entries – All Day**

  Data included in the worksheet: Name, Entry Type, Description, Start Date, and End Date
- **Eloqua Campaigns ***

  Data included in the worksheet: Name, Status, Start Date, and End Date
- **Eloqua Emails ***

Data included in the worksheet: Title, Campaign, and First Possible Send Time

* A workbook will only contain worksheets for Eloqua Campaigns and Eloqua Emails if an active integration exists between Content Marketing and Eloqua. The Export Calendar functionality is only available for an active Content Marketing license and is not available for the Oracle Marketing Calendar App within the Oracle AppCloud Marketplace.

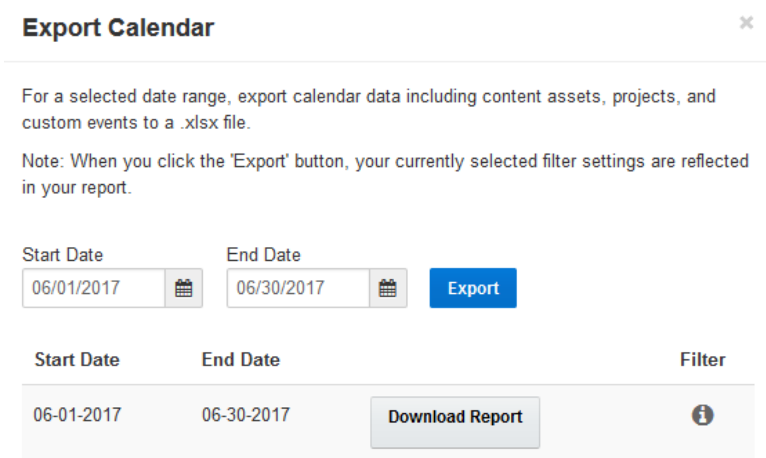
Note: Content assets must be scheduled to appear in the export.

To export the calendar to an Excel file:

1. Navigate to **Planning** > **Calendar**, the calendar opens.
2. Click **View more options**> **Export Via Excel**, the *Export Calendar* window opens.
3. Enter a **Start Date** and an **End Date**, then click **Export**, the export begins.

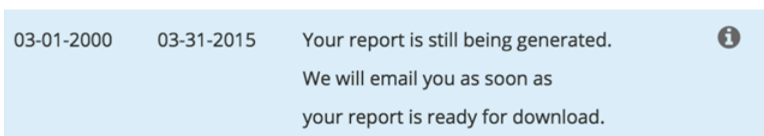
   Note: The *Start Date* and *End Date* are both required fields.

   If generation of the report has completed within 15 seconds, a **Download Report** button becomes available to download a copy of the .xls file.



Hovering over the filter information icon shows a list of the filters used in the export and the corresponding settings for each filter.

If the report is not complete within 15 seconds, a notification is displayed and the export continues to generate in the background. Once the export has been generated, an email is sent containing a link to download the export.



6.11 Configuring calendar settings

The calendar settings page enables all users to configure their calendar experience. A couple of customization options that are available from the settings include:

General Users

- Modify view settings, including which data displays in the view
- Choose which view should display by default on load of the calendar

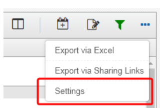
Administrative Users

- Create re-usable types of entries on the calendar, and determine how they display - i.e. Marketing Events with a specific icon and color
- Set default views on the calendar for any user - typically used for a user who needs to be informed about progress for specific initiatives
- View access - determine if views should be available publicly or not

A user will need the **Manage Calendar Settings** right to access these administrative configurations.

You can access calendar settings using one of two methods:

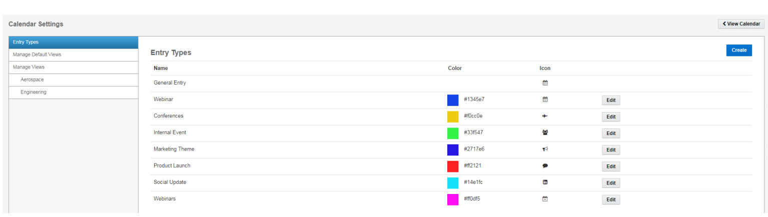
- Navigating to **Planning > Calendar > View more options > Settings**.



- Navigating to **Settings > Calendar**.

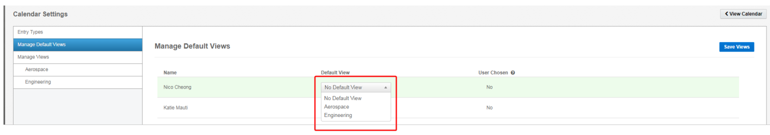
6.11.1 Custom calendar entry types

The **Entry Types** tab allows you to manage your custom calendar entry types. Create entry types to track a variety of marketing initiative events and reuse these types as needed. Defined entries can also be shared across Business Units, to help marketers work towards consistent patterns of usage across teams while maintaining a consistent visual display on the calendar.



6.11.2 Default views for all users in your license

The **Manage Default Views** tab allows you to set whether a user should have a default view, or change the default view on their behalf. Once a default view is set, the users for which you have modified will now see that view when accessing the calendar.

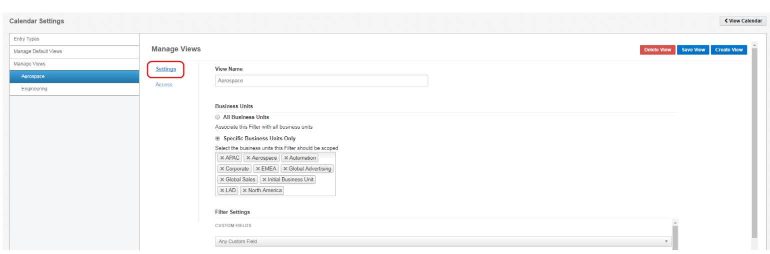


Note: If a view is not displayed in the drop down list, the view you are looking for may not be available for that specific user. For each view, there are access permissions that control which users can enable the view.

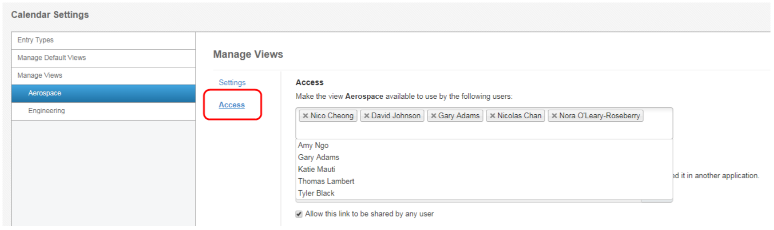
6.11.3 Managing views

The **Manage Views** tab allows you to create new views and modify the settings of existing views and their sharing permissions.

Use the **Settings** tab to modify the name of a view and the view's filter configuration.

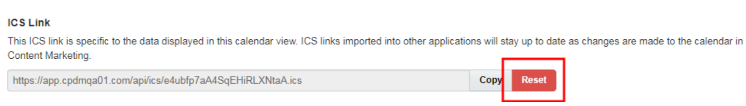


Use the **Access** tab to configure methods in which users and non-users can access a view.



- **Access**: Choose which users should have access to a view when they are authenticated to Content Marketing.
- **View Link**: The URL to access that particular view on the calendar. This URL will most commonly be used when a calendar view is set to Public so that other stakeholders can view marketing activities without being a user within Content Marketing. Enable **Allow this link to be shared by any user** to display the URL to the calendar view within the Share options on the calendar.
- **ICS Link**:The iCalendar (ICS) file link to access this particular view of the calendar. ICS links are used to import Calendar data into another calendar of choice that supports import of iCalendar files including but not limited to Google, Outlook, or Mac. ICS links imported into other applications will stay up to date as changes are made to the calendar in Content Marketing.

After a view is selected, clicking **Reset** will change the Calendar Sharing URLs.



Note: Resetting the Sharing URLs for the Calendar helps marketers control who has access to the marketing calendar. Users who have subscribed to an older URL will need to update their subscription after reset, as their calendar subscription will no longer update.

- **Privacy Policy**

  Select a privacy policy to enforce for your calendar.

  - **Public**

    A calendar can be set to be completely public to any consumer who has access to the URL or can be public to a select set of whitelisted IP addresses.

    The **Allow all IP addresses** option makes the calendar available to anyone. The **Restrict access based on the following IP rule policies** option allows an admin to restrict access based on the IP by which someone is accessing the calendar.

  - **Private**

    Setting the calendar's privacy policy to Private means that a user must be authenticated to access the calendar. IP Policy Restrictions do not apply when this option is selected.

- **Embed Policy Whitelist**: Enter the domains to whitelist for your calendar to be embedded within other applications. Once the domain(s) where the calendar will be embedded have been properly configured, an embeddable URL for the calendar will be created.

  Administrators can configure the appropriate level of specificity on where the calendar can be embedded.

- **Embed Code**: If you have specified an embed policy, a sample iframe embed code for your calendar is displayed containing the URL to calendar view.

7 Creating Content

Oracle Content Marketing is an end-to-end application for content creation and publishing. Using Content Marketing, marketing teams can collaborate on the production of common pieces of marketing content such as blog posts, white papers, emails, newsletters, infographics, photos, and videos.

Marketers can then share content seamlessly across different Business Units to support an unlimited number of teams, or in an agency setting - creative teams servicing multiple customers.

These content assets can be published to multiple locations. Once published, Content Marketing provides analytics to see how your content is performing.

Learn more: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

7.1 Creating content assets

You have the ability to create content assets that will automatically publish once approved through the assigned workflow. Marketers can configure content to display in configurations using text, images, videos and documents that best support their marketing campaigns.

Marketers can create assets and start drafting a post immediately, or they can create an 'idea', where an idea is saved with just a title until the time the idea is assigned out to be fulfilled. Assignments are typically drafted by an editor that will select the type of content best suited for that idea.

Note: Content Marketing will automatically save your asset in the background while you are working in the text editor. Autosave is the automatic and constant saving of a content asset. When using the Oracle Content Marketing text editor, your content asset will autosave after every 100 characters added to the asset or after 30 seconds of inactivity.

To start a content asset as an idea:

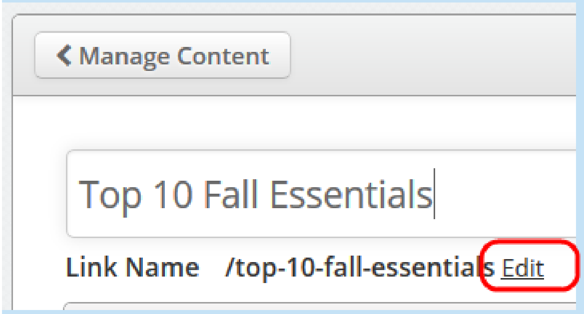
1. Navigate to **Collaboration** > **Create Content**.
2. Enter a title for your content asset.

   Content titles are used for different purposes depending on the publish location. When publishing to a content hub or Wordpress site, the content title is used as the 'headline' of a post. However, when publishing to Eloqua or Responsys, the content title is used as the filename for the piece of content and will also appear within the content as a title. This title can be modified within Eloqua and Responsys.

   Content Marketing will restrict the length of a title to a maximum of 255 characters. If a content asset title is longer than 255 characters, the user will be prompted with an error when attempting to save until the time the title length has been reduced.

   Tip: If you want to customize the keywords used in the URL, click **Edit** next to the Link Name displayed beneath the title field. Edit the link name as needed then click

Done.



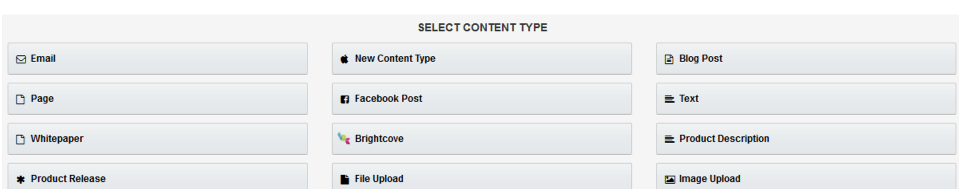
3. You have created the basis for an idea for a Content Asset, click 'Save' to save your idea to your library.

Create the first draft of your content asset:

Users can create their first draft from an existing saved idea, or they can create their first draft immediately from an idea of their own.

To create the first draft of your content asset:

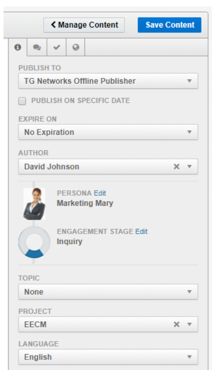
1. Select a content type. If your list of available content types do not accurately reflect the type of content you would like to create, see Creating content types for more information on creating new content types.



2. Create content for your asset by typing directly into the content editor. Learn more about customizing your content assets.

Note: If you'd like to copy/paste content into the content editor, it is recommended to paste content first into Notepad and then into Content Marketing. Pasting content into Notepad will strip the text of all application specific formatting and HTML. Certain rich text editing programs contain hidden formatting plication specific formatting and HTML. Rich text editing programs contain hidden formatting that may not be HTML standards compliant markup that may interfere with web formatting. Learn more about copying text from Word.

3. On the **Content Settings** tab, configure the options as needed:



- **Publish on Specific Date**: Select to choose a specific date to publish the content asset. Select a date and time for the asset to be published.
- **Expire On**: Select an expiry option.
  - **No Expiration**: Content will not expire. By default, assets are not set to expire.
  - **Specific Date**: Content expires on a specific date. Set a time and date for content to be expired.
  - **Relative Date**: Content expires on a relative date. Set an amount of days or months content will expire after.
- **Author**: Select an author to assign to the content asset.
- **Persona**: Select a persona to associate to the content asset.

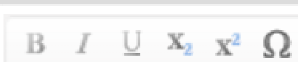
- **Engagement Stage**: Select the engagement stage the content asset is intended for.
- **Topic**: Select a topic to associate to the content asset.
- **Project**: Select a project to assign to the content asset.
- **Language**: Select a language to assign to the content asset.

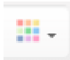
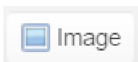
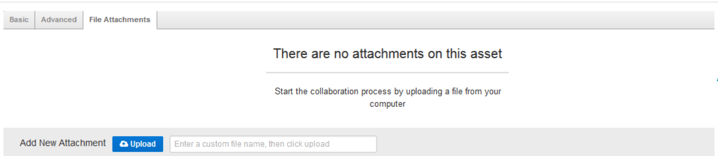
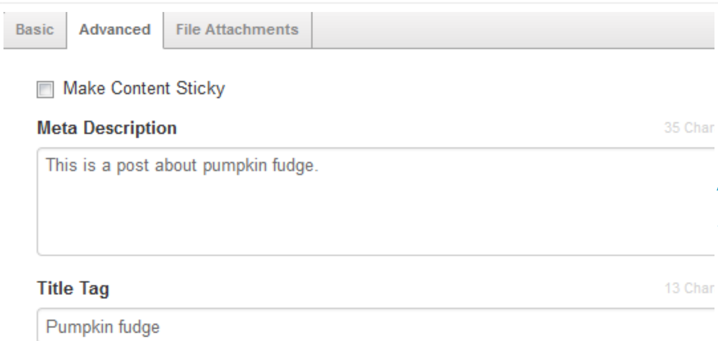
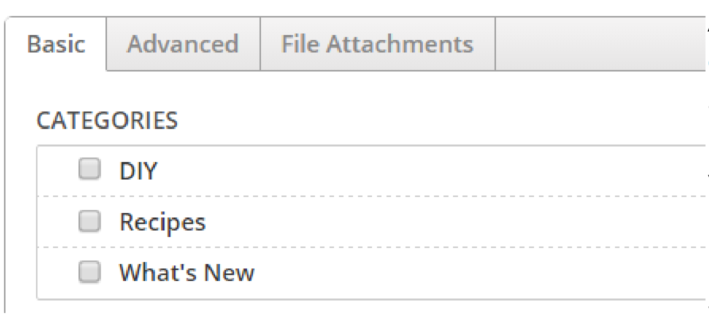
4. (Optional) Configure the asset using the action panels.
   a. Content discussion subscriptions
   b. Managing content workflow
   c. Managing localized assets
5. Click **Save Content** when you are finished creating the content.

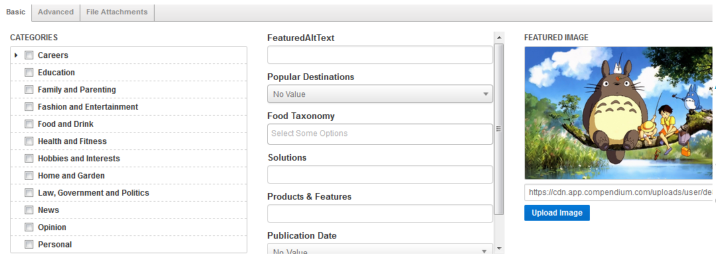
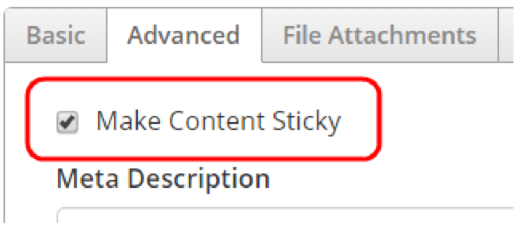
> **Note**: The WYSIWYG editor will make modifications to your HTML including the removal of certain HTML selectors. See Storage of assets and files FAQs to learn more.

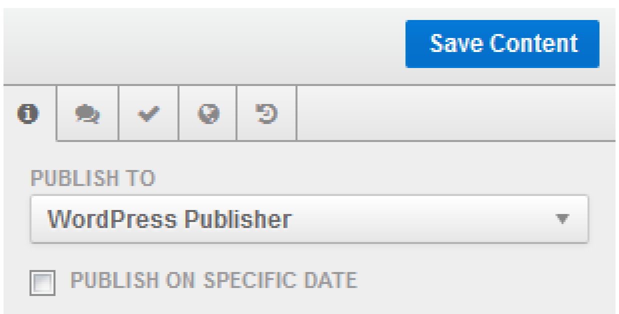
7.2 Customizing content assets

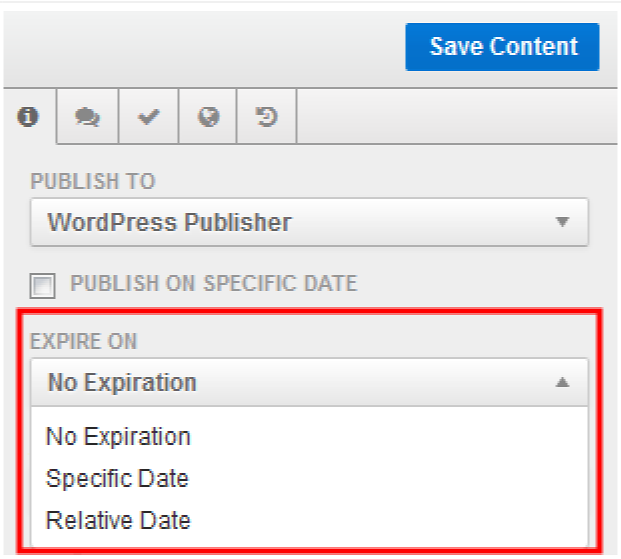
After you create a content asset, you can customize the content. The following table outlines every option in the editor and explains what the option does.

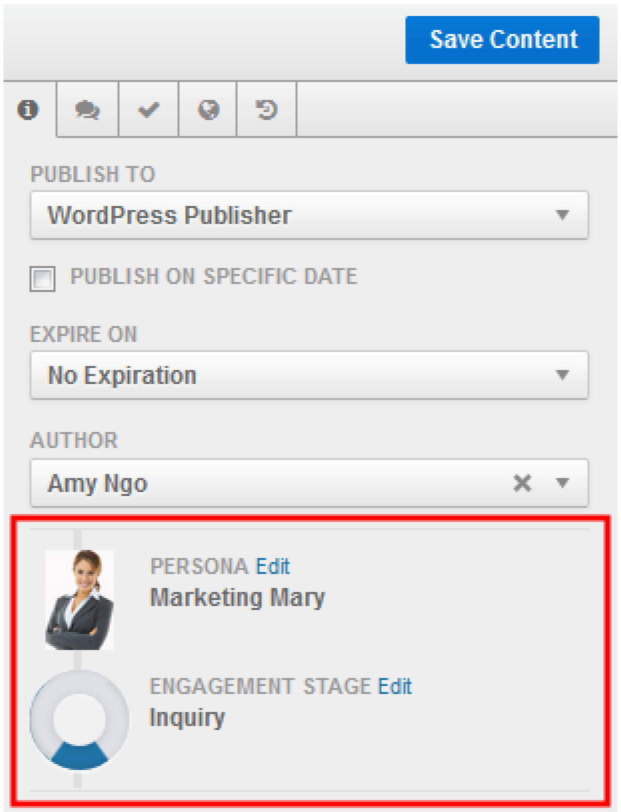
Option	Location in the editor	Description
Font styling		Apply font styling by highlighting your text and clicking on the desired icon. Font style options include bold, italicized, and underline.

Option	Location in the editor	Description
Font Colour		Change font color by highlighting your text and clicking on the text color icon.
Insert Table		Insert a table. Click , then format the table properties as needed.
Insert Audio		Embed a playable audio file.
Embed YouTube Video		Embed a YouTube video, or a thumbnail image of a YouTube video.
Insert Image		Add an image and add a title tag to that image.
Insert / Remove Link		Add a link.
Upload File Attachment		Add an external file (PDFs, Excel, and so on).
Meta Description / Title Tag		Add a meta description and title tag.
Add to Category		Add an asset to a category so it appears on a specific category page in your Content Hub or on your Wordpress website. Navigate to the *Basic* tab below the text editor, then select the check boxes for

Option	Location in the editor	Description
		the categories in which you want your content asset to appear.
Add Featured Image		Add a featured image (an image that will appear as a thumbnail for the content asset).
Make Content Sticky		Use the content as sticky content, select the *Make Content Sticky* check box in the *Advanced* section below the content editor. Sticky content is also referred to as a bio post, it will remain stuck at the top of your user blog and will not compend to any other blog within a network. Things to remember about sticky content: • It is only applicable to the Author blog that it is created under. • It will remain stuck at the top of that specific

Option	Location in the editor	Description
		Author blog. • It will not compend to any other blogs. • You can view your sticky content by inserting your own information into the following URL: http://blog.[yourcompany].com/blog/[YourUserBlogTitle]
Publish on Specific Date		Schedule the publishing for a later date, select the *Publish on a Specific Date* check box in the *Content Info* tab on the right-side pane, then specify the date and time in the corresponding fields. **Note**: If an explicit publish date is not scheduled, the publish date will

Option	Location in the editor	Description
		appear as the date when the content asset was approved through workflow. If you schedule a content asset for a future date and your Administrator approves it prior to the scheduled date, it will not appear live on the blog until the date you have it scheduled for.
Content Expiration		Set content to expire on a specific time and date, or on a relative date in the future. This functionality is used to automate the process of setting an end of life time frame on a single, or group of content assets. When content hits a set expiration date, it can automatically be

Option	Location in the editor	Description
		removed from where the asset was published.
Persona		Use a Persona to hone the messaging for a targeted customer. In the right-side pane click **Edit** (next to *Persona*) then select a persona from the list. Learn more about Personas. You can also change the engagement stage by clicking Edit (next to *Engagement Stage*) and selecting a stage from the list.

7.2.1 Adding images to content assets

You have the ability to add images to your content assets using the Oracle Content Marketing text editor. It is important to note that how the image displays will vary based on the device, browser, computer type, and settings - which are ultimately determined by the end viewer. The best practice is to optimize all graphics for web using an image editing tool prior to inserting them into your content asset.

To add an image to a content asset:

1. Click **Image** in the content editor, the *Image Properties* window opens.
2. You can either upload an image from your computer or link to an image hosted on the web:
   - **To upload an image**: Under the *Upload File* tab, click **Browse**, then locate the file on your computer and click **Open**.

     > **Note**: We recommend that you upload an image no wider than 1000px. The image will already be resized to 640px wide; the larger the total image dimensions the longer the image will take to load.

   - **To link to an image**: Under the *Link* tab, enter the URL of the desired image and select the Target.
3. Select the **Image Info** tab and configure the image details:
   - **URL**: The URL where the image is located.
   - **Alternative Text**: A description of the image. Alternative Text (known as Alt text) is a text field that will assign the alt tag, image title, and hover text for the image. Alt text is crawled by search engines and is one small aspect of optimizing a page for specific keywords to aid in your organic search efforts. Adding an image description also improves the webpage’s accessibility for the visually impaired. It is best to concisely and accurately describe the image with Alternative Text.
   - **Width and Height**: Specify the width and height of the image in pixels. Ratio proportions are locked to ensure the image is proportional. By clicking on the padlock icon ratio proportions can unlocked, to allow custom sizing. When the padlock icon is closed, ratio proportions are locked; when padlock icon is open, ratio proportions are unlocked. Also, note that images are resized to a lower resolution to improve load times.
   - **Border**: To add a border, specify the border width you would like to use.

Example: A 'Border' value of 2 will add a 2 pixel border around the image.

- **HSpace and VSpace**: Specify the margin widths around the image by adjusting the horizontal (HSpace) and vertical (VSpace) padding.
- **Alignment**: Set the image alignment to the left or right. Leaving it as <not set> will result in it being displayed inline.

4. Select the **Link** tab to make the image a hyperlink, and configure the details:
   - **URL**: Enter the hyperlink location.
   - **Target**: Specify how the hyperlink should open.
5. Click **OK**, the window closes and the image is added to the content asset.

7.2.2 Adding title tags to images

You can add title tags to the images in your content assets so that when a reader hovers over the image, text will appear.

To add a title tag field to your images:

1. Add an image to your content asset, then click **HTML** and locate the image tag, it will look like the following:

2. Add `title="<value>"` to the tag, within the empty quotations enter the text that will appear when someone hovers over the image. In the end, your modified `<img>` tag will look something like this:

```
<img title="Title Tag Goes Here" src="image.png" alt="Your Alt Tag is Here" />
```

> **Note**: The order left to right of the title, `src` and `alt` does not matter, they can be in any order.

3. Click **HTML** again to return to the regular view, when you hover over the image the new title tag should appear.
4. Click **Save Content** to save your changes.

7.2.3 Adding featured images to content assets

You can specify a featured image for a content asset. Featured images can be used as the thumbnail that appears in a social promotion through the application of the OpenGraph Protocol, as well as used to set various images if you are utilizing a hub page on your blog.

> **Note**: If a featured image is not uploaded, the first image in a content asset will be used when sharing to social sites. If an asset lacks any images, the network's default image for social sharing will be used (your blog Administrator controls the default image).

To add a featured image to a content asset:

1. Create a new content asset or open an existing content asset.

2. Under the *Basic* tab (below the content editor) in the *Featured Image* section, either enter an image URL or click **Upload Image**, to upload an image from your computer.

   Note: The file you provide is not resized when passed to social sites. The image will be displayed within the 100px by 100px box for the preview, which mimics how it will look on Facebook and LinkedIn.

3. After adding the image, click **Save Content** to save your changes.

If you are publishing to a Content Marketing content hub or to a website using Wordpress, you can add alt text to your content's featured images through the use of a custom field.

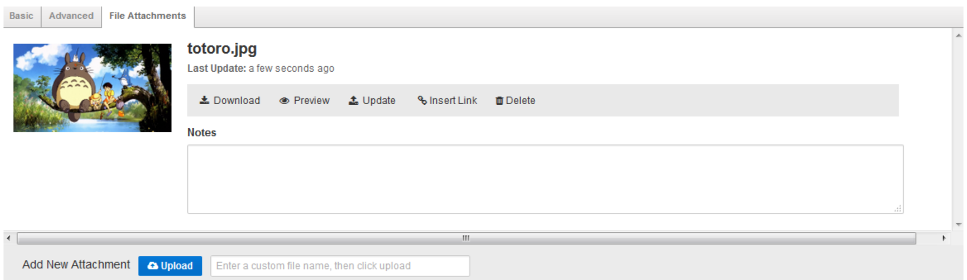
7.2.4 Uploading external files

You can upload an external file and attach it to your content asset. Most commonly marketers will attach content assets in PDF form, but other types of attachments can include binary files like Excel, or Word files with reference information for a team when authoring content.

Tip: Content asset attachments are indexed and will appear in results when searching the content repository.

To upload an external file:

1. Create a new content asset or click **Edit** to open an existing content asset from the *Manage Content* page. The content asset opens in the content editor.
2. Click the **File Attachments** tab (below the text editor).
3. (Optional) Enter a custom file name if you want to give the file a unique name.
4. Click **Upload**.
5. Locate the file on your computer, then click **Open**.



The file is added as an attachment to your content asset.

Attachment Features

- Click **Download** to make a copy of the file on your local device.
- Click the thumbnail or **Preview** to preview the attachment.
- Click **Update** to update the image with a more recent version. Select the new file, then click **Open**.
- Click **Insert Link** to insert a link to the attachment in the body field. Fill in the *Link Text* field to customize the linked text of the file attachment.
- Click **Delete** to delete the attachment.
- Add notes about the attached file in the *Notes* field. Click in the *Notes* field to make edits, clicking off will automatically save any changes. Customers add notes to attachments as a way to track the history of files used in the collaboration process.

A preview thumbnail will be rendered for most types of file attachments, including images and document files such as PDFs or Word files. Users can view a full size preview of the file by clicking on the thumbnail or by clicking **Preview**.

Preview Features

- **Previous / Next Page**: Moves to the corresponding document page in the preview.
- **Rotate left / right**: Rotates the preview 90 degrees.
- **Fit page to window**: Adjusts the zoom to fit the page length to the preview window.
- **Fit page to window width**: Adjusts the zoom to fit the page width to the preview window.
- **Zoom to actual size**: Adjusts the zoom to 100 %.

Note: An entry will be added to the content history for every change made to file attachments such that a complete audit history can be performed on an asset at any time.

Adding links to content

As an Author, you can add a link to a content asset that will take readers to a different website or another content asset on your website. Linking to other pages on your site is a great way to get visitors to spend more time on your site. Also, links are often used to take blog readers to another site that provides more information.

To add a link to content:

1. In the text editor, click the insert link ( ) icon, the *Link* window opens.

   Note: To convert a string of text into a link (i.e. Click Here), you need to have the desired text highlighted before you click the 'Link' button.

2. Specify the details for the link under the *Link Info* tab, the options available depend on the link type selected:

   - **URL**: Specify the Protocol.The Protocol drop-down allows you to select either 'http://', 'https://', 'ftp://', 'news://', or 'Other'. You will need to look at the URL of the page you are linking to so that you can determine which is appropriate. Enter the URL, the web address of the page you are linking to. Select the **Open in new window** check box if you want a new window to open when a reader clicks on the link. This is recommended so that readers who click on the link will not be taken away from your blog page.

     URL links come with additional options:

     - The *Target* tab allows you more customization in where you want the link to open.
     - The *Upload* tab allows you to upload a PDF document or a file to upload that is on your local computer. Click **Browse** to locate a file.

- **Link to anchor in the text**: This option links to a different location in your blog. Select the **Open in new window** check box if you want a new window to open when a reader clicks on the link.
- **E-mail**: This option links to an email, specify the email address, the Message Subject, and the Message Body. Select the **Open in new window** check box if you want a new window to open when a reader clicks on the link.

3. Click **OK** when you are done configuring the link, the window closes and the link is added.

7.2.5 Adding tracking to links and PDFs in content assets

As an Administrator, you have the ability to add tracking to a link or PDF within a content asset. This tracking will show in your network's Google Analytics account.

To add tracking to links and PDFs:

1. Login to Oracle Content Marketing with your Administrator credentials.
2. Navigate to **Collaboration** > **Library**, the content management screen opens.
3. Select the content asset to which you would like to add tracking, then click **Edit**, the content editor opens.
4. Click **HTML** to view the HTML version of the content asset, this is where you will add the additional tracking.
5. Locate the required PDF or link within the source, then add the following code after the href: name="cta=tagstring-date"
6. Change the tag string to represent the specific PDF you are linking to and change the date to the publish date for the content asset. The finished link with tracking applied should look like the example below:

   PDF Link

Text

7. After adding the tracking code, click **HTML** again, then click **Save Content**.

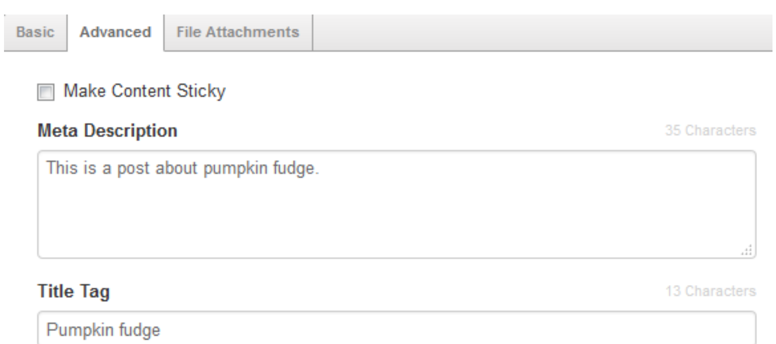
7.2.6 Adding meta descriptions and title tags

As an Author, you have the ability to edit the meta description and title tag on a per-content asset basis. The purpose of editing the meta description of a category is to control what Google shows on a search result for a specific content asset. If you do not add a custom description, Google will index the page and generate its own description to display in the search result.

Title tags display at the top of browser and applicable tabs. They are normally used as the link to your website portion of the Search Engine Result Page (SERP). Editing the title tags of content assets on your network gives you more control and leverage over how your pages are being displaying within Google and other search engines.

To add a meta description and title tag:

1. In the content editor, navigate to the *Advanced* tab (located beneath the text editor), then add the desired meta description and title tag in the corresponding fields.



Note: It is recommended that you keep the length of your custom title tag less than 70 characters in length.

2. Click **Save Content** to save your changes.

7.2.7 Adding MP3 files to content assets

As an Author, you can add a MP3 file to a content asset.

To add an MP3 file to a content asset:

1. In the text editor, click , the *Upload MP3* window opens.
2. Click **Browse**, then locate the MP3 file on your computer, then click **Open**. While the file is uploading, the following message displays: Please wait for this screen to close before taking further action.
3. When it is done uploading, provide additional information about the file, including the Title, Artist, and Copyright. At least one piece of information is required, this information will display in the content asset (excluding the URL).
4. Click **OK** and you are returned to the text editor.

Note: Although the audio player is not displayed in the text editor, it is there. You can click **Preview Content** to see what it will look like when the content asset is live.

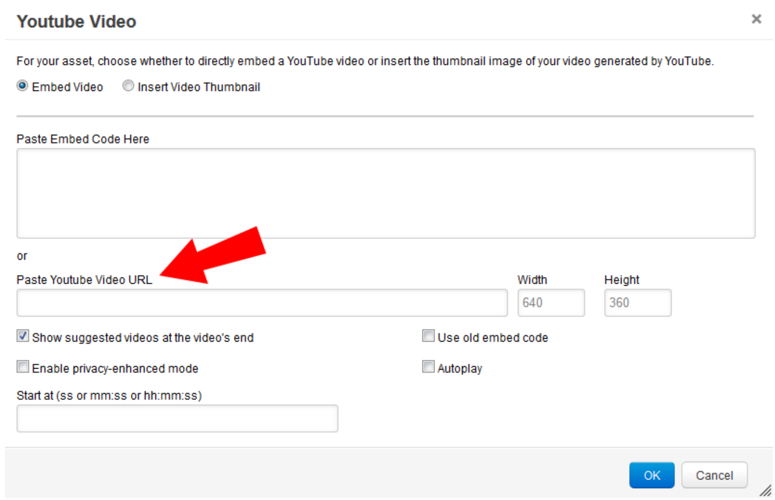
7.2.8 Adding video to content assets

Users have the ability to integrate YouTube videos into their content assets. In Content Types with WYSIWYG editors, users can elect to either directly embed a YouTube video or pull in the thumbnail for the YouTube Video to link out to the video on YouTube.

> **Note**: If you are using Internet Explorer, you may be prompted with a security warning. Be sure to select 'No' so that you can view all information and form fields.

To add a YouTube video to your content asset:

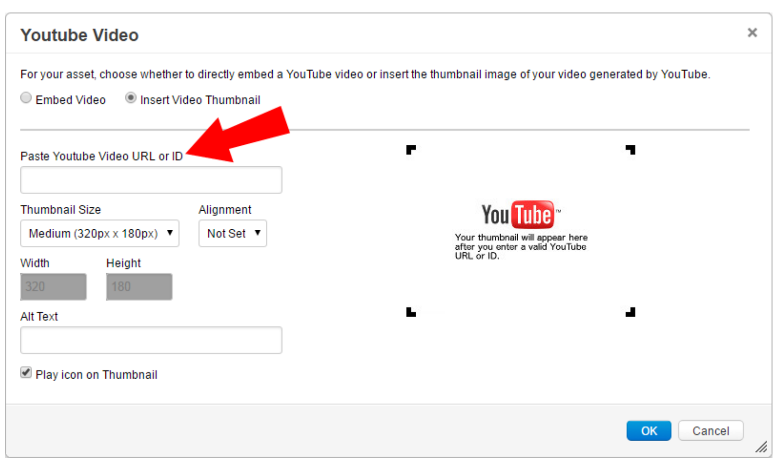
1. Locate the YouTube video on the web and copy the URL in the address bar of your browser.
2. Click the (YouTube icon) in the content editor, the *YouTube Video* window opens. Two options are listed. Select either **Embed Video** or **Insert Video Thumbnail**.
    a. To directly embed the video, paste the YouTube URL into the corresponding field, review the available options to confirm that the video is properly configured to embed then click **OK**. The window closes and an iFrame box is placed in the editor where the video will appear. Click **Preview Content** if you want to view the video as it will appear on the live blog.



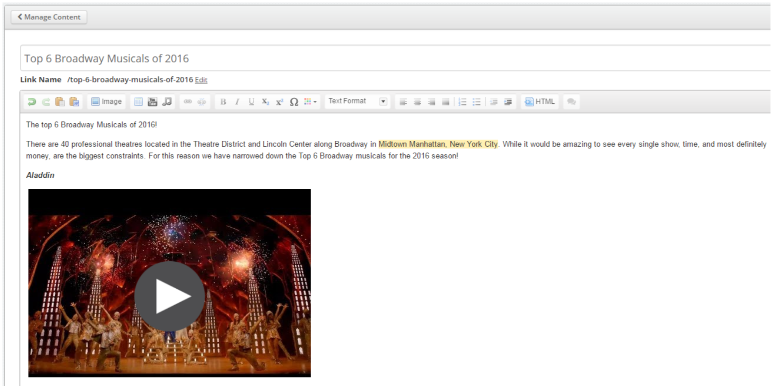
b. To insert a video thumbnail, select **Insert Video Thumbnail**. Paste the YouTube URL or ID into the corresponding field. The video thumbnail will appear immediately after a valid URL or ID has been entered. Users can select from three preconfigured thumbnail sizes or set their own and the preview will update accordingly.

Users can elect to display a 'play' button on top of the thumbnail image, as well as set the alignment and any Alt Text for organic search considerations.

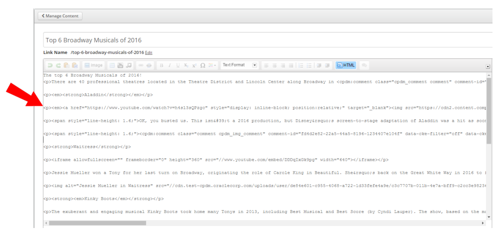
After finishing your configuration, click **OK**.



c. The window closes and the YouTube video thumbnail appears directly in the content asset.



To view the source code, click the **HTML** button in the content editor. There you will see the related code for the YouTube video thumbnail.



A sample showing the HTML for the video thumbnail:

```
<p><a href="https://www.youtube.com/watch?v=h4sl3sQPzgc"
style="display: inline-block; position:relative;" target="_
blank"><img
src="https://cdn2.content.compendiumblog.com/images/video_
play.png" style="position: absolute; height: 33% !important;
top: 0; bottom: 0; left: 0; right: 0; margin: auto;"
/></a><a href="https://www.youtube.com/watch?v=h4sl3sQPzgc"
style="display: inline-block; position:relative;" target="_
blank"><img class="youtube-thumb"
src="https://i1.ytimg.com/vi/h4sl3sQPzgc/hqdefault.jpg"
/><img
src="https://cdn2.content.compendiumblog.com/images/video_
play.png" style="position: absolute; height: 33% !important;
top: 0; bottom: 0; left: 0; right: 0; margin: auto;"
/></a></p>
```

Learn how to troubleshoot video issues.

7.2.9 Troubleshooting video issues

As an Author, you have the ability to add videos to content assets using the Oracle Content Marketing text editor. If you encounter a problem viewing the video within your content asset, please follow the troubleshooting suggestions listed below:

To troubleshoot issues with video:

1. Visit the video's hosting provider's website to see if they have made any updates. If they have made any updates on their end, this could affect how the video is displaying.
2. Check to make sure the video is still being hosted live on their site. If the provider is no longer hosting the video, it will appear as a black box on your content asset.
3. Verify that the HTML embed code is correct.
4. Allow your video hosting provider as a trusted site in your Firewall software.
5. Ensure your video player is set as the default and other applications like Quicktime, iTunes, Real Player, or Windows Media Player aren't set as the default.

7.2.10 Copying text from Microsoft Word

All text within Microsoft Word or Outlook has additional formatting because Microsoft Word products contain <MSO> formatting tags and styling. When you do a copy/paste of text from Word or Outlook, this formatting is also copied. The <MSO> formatting can alter the formatting of the text, the way the whole blog page displays, or the way the Content Marketing application responds.

> **Example**: When first created, each Author receives an e-mail with their username and temporary password. When the password is copied from Outlook

into the Content Marketing application, the text formatting is recognized and therefore will not allow an author to login. The Author must manually type the password into the form field.

As an Author, we recommend you create content assets directly in the Content Marketing content editor. If you want to compose content assets in Word, you can utilize the 'Copy from Word' button within the text editor to remove the additional formatting and prevent the issues mentioned above.

To copy text from Word:

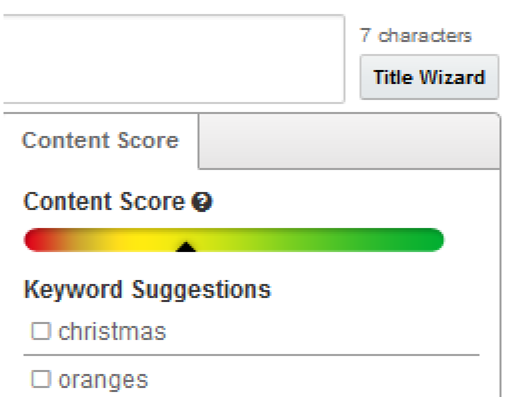
1. Login to http://www.compendium.com/ with your Author credentials
2. Open the Word document containing your content asset.
3. In the Content Marketing content editor, click , the *Paste from Word* window opens instructing you to paste the text from Word into the form field.
4. Copy the content asset from Microsoft Word and paste (Ctrl/Cmd+V) it into the box, then click **Ok**. The additional formatting is stripped and your content asset appears within the Content Marketing text editor.
5. Click **Save Content** to save your changes.

7.3 Content scoring, keyword suggestions and best practices

Content types that have the Content Scoring functionality enabled, display a number of content scoring tools to show authors how content is performing based on a set of pre-defined criteria within the license.

7.3.1 Content Scoring

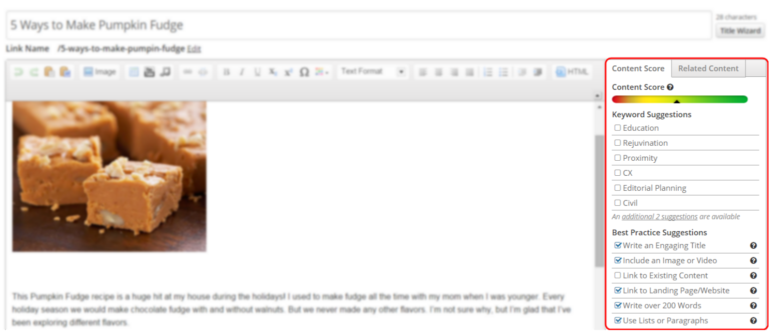
The *Content Score* to the right of the content asset editor helps you gauge how relevant your content is to your network's categories. The *Content Score* indicator will automatically start in the red. Your score will start to improve and shift into the green depending on the amount of keyword phrases that are used in your content asset as well as your content's adherence to a set of best practices pre-set within your license. Custom Keyword Suggestions and Best Practices can be created within the license, however only custom keyword suggestions will contribute to the content score. Custom best practices are displayed to provide direction to the author only, and do not contribute to the content score. The content score indicator will update when an asset is saved, either saved manually by the author or auto-saved by the system. Auto-save occurs at every 100 characters or after 30 seconds of inactivity.



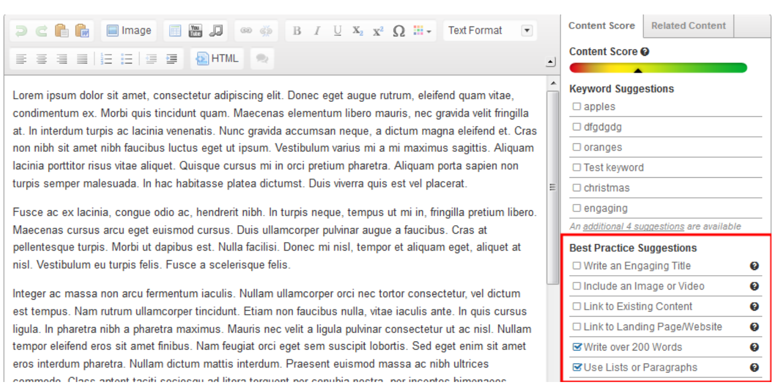
The *Content Score* compares the amount of total content (meaning all the words you have written) to the number of exact category phrases used. This indicates that you've used a proper number of exact category phrases in your content asset, which is one of the goals when creating content. The Content Score was created to help guide you in this process.

7.3.2 Keyword and Best Practice Suggestions

The *Content Score* panel also guides the creation of content by recommending keywords to authors during content authoring. Keyword Suggestions are displayed to instruct authors on SEO-friendly terminology to weave into content or words that should be used to best reflect your brand messaging.



Best Practice Suggestions are also displayed to remind authors to remind authors to follow content creation guidelines. Best Practices suggestions are displayed when authoring content.



7.4 Creating content with Email-to-Post

Authors can create content in email or another tool they are familiar with and then submit that content into Oracle Content Marketing using their Email-to-Post email address (@compend.me).

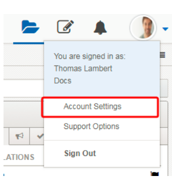
Users also commonly use this tool to forward an email chain that may be used as an idea for a piece of content, allowing authors to repurpose email communication or extract snippets that are used directly in marketing communications.

This functionality provides:

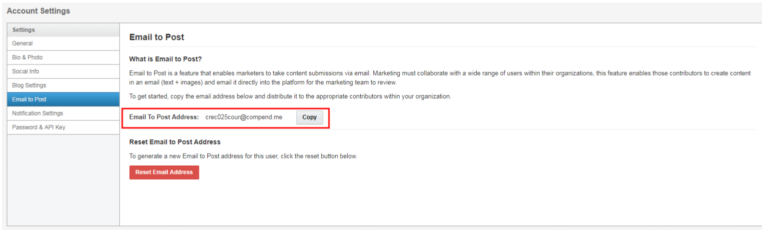
- Easy content submission from anywhere a user can access their email address
- Flexible formatting options such as HTML, rich text, or plain text
- Support for users to submit images in standard formats (.jpg, .gif, and .png) and media files. Content submitted using email to Post that contains media may take a little bit longer to display in the library than text only content.

To create content using your Email-to-Post email address:

1. Navigate to **Account Settings**.



2. Click **Email to Post** on the left-side menu, your unique *@compend.me* email address is displayed.



Each Email-to-Post email address is a randomly generated string of 11 characters and integers, to ensure each email address is completely unique.

Tip: The user administration page lists Email-to-Post email addresses for every user. Navigate to **Plan** > **Users** to see the Email-to-Post email addresses for users listed under the actual email address for each user.

3. Create or forward an email from your traditional email address to your @compend.me address.

When submitted, the content will appear either as a draft in your Author account or as a pending content asset in the Administrator account. Whether the content displays as draft or pending is based on a configuration setting that can only be applied by a Super Administrator. Submit a ticket to My Oracle Support (http://support.oracle.com) to see which setting is applied to your license.

Generate a new Email-to-Post email address

If you want to generate a new @compend.me email address, click **Reset Email Address**.

A dialog will appear prompting the user with a confirmation message before resetting the email address. Resetting your address will nullify your old address and all new content must be sent to the newly generated address.

7.5 Editing content assets

As an Author, you have the ability to edit a content asset even after it's been submitted for approval.

To edit a content asset:

1. Navigate to **Collaboration** > **Library**, all content assets are listed in the left-side pane.
2. Select the content asset that you want to modify, then click **Edit**, the content asset opens in the corresponding editor.
3. Modify the content asset as needed, then click **Save Content** in the upper right-hand corner to save your changes .

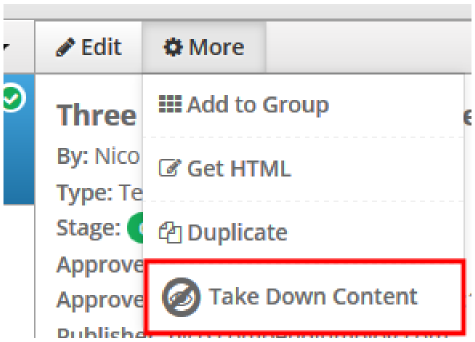
7.6 Deleting content assets

Granted the permission to delete content, you can delete assets that are no longer needed. You can delete content assets in any workflow stage, however if the content asset is published, you must unpublish the content first before it can be deleted.

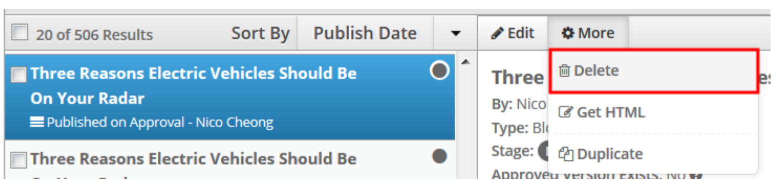
To delete a content asset:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset that you want to delete.

3. If the asset is published, it will need to be taken offline before it can be deleted. Click **More** > **Take Down Content**, and click **Take Down** in the confirmation dialog.



4. Click **More** > **Delete**.



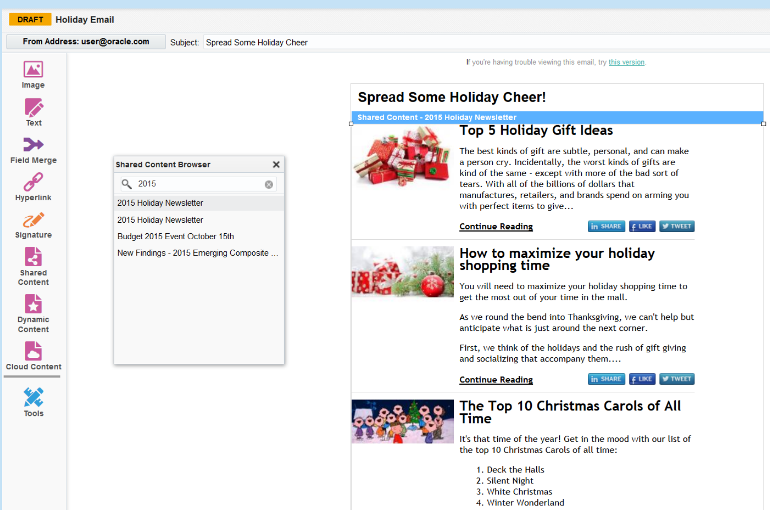
5. Click **Delete** in the confirmation dialog.

8 Content groups

Content Groups allow marketers to group several published content assets together, style the content group into a package, and publish the grouped content together.

Content is typically published within a newsletter, but you can also promote content groups to Eloqua to be used in email campaigns and landing pages, or you can copy the content group HTML and use the content anywhere such as on your corporate website. The process of using content groups is as easy as selecting the content you would like to use, formatting the content to your liking, and pushing it to where you want it to go.

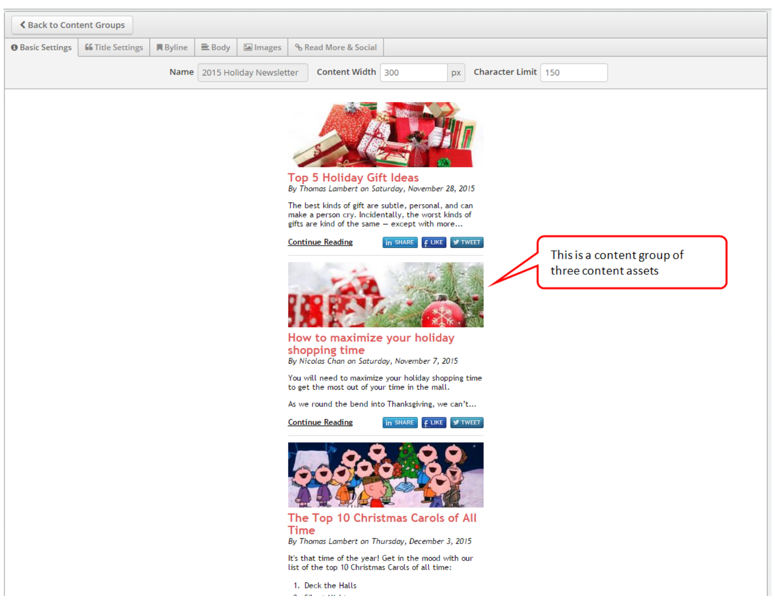
Example: Content groups from Content Marketing can be inserted into Eloqua emails. For more information, see Promoting content groups to Eloqua.



Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

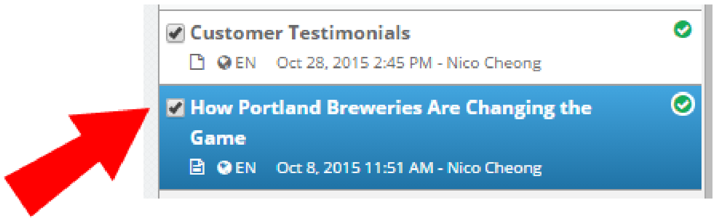
8.1 Creating a content group

You can create a content group to group published content assets together as a package. A package of content assets has typically been used for newsletter communications.

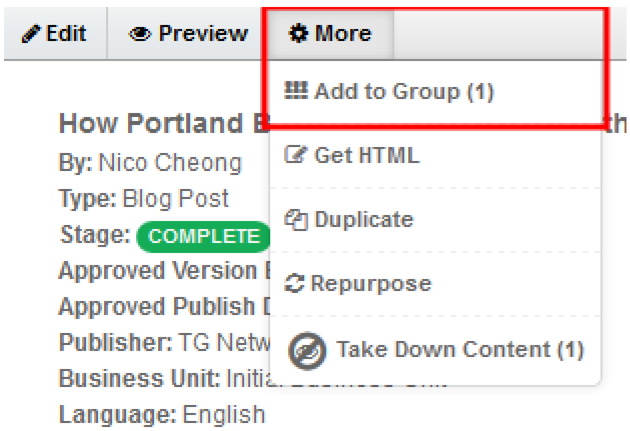


To create a content group:

1. Navigate to **Collaboration** > **Library**.
2. Select the published content asset(s) you want to add to the content group.



3. Click **More** > **Add to Group**. The number of content assets that will be added to the content group is displayed in the menu.



4. Click **Create New Content Group**.

5. Enter a name for the content group and click **Save** to finish, or **Save and Edit** to edit the content group settings.

The content group was created.

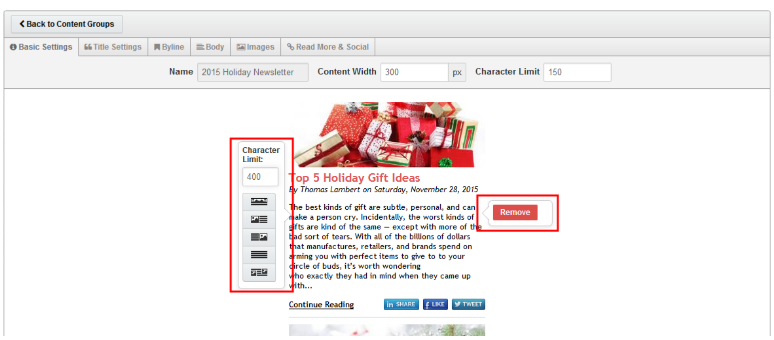
8.2 Editing content groups

You can edit content groups to customize the package of content assets according to your needs. Depending on the intended publish location, you might want to rearrange content layouts, adjust alignment, set character limits for the content group and so on.

💡 **Note**: Individual content assets cannot be edited once they are added to a content group, any changes will not be reflected in the group.

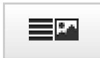
To edit a content group:

1. Navigate to **Collaboration** > **Groups**, a list of all content groups opens in the left-side pane.
2. Select the group that you want to edit, and click **Edit**, the content group opens in the editor window.
3. You can rearrange the content order within the group. Hovering over a block of content will display a move icon. Click and drag the content block to a new position.
4. Hovering over a block will display a contextual menu to adjust the alignment of the content, set the content preview character limit, and remove content from the group.



The alignment options are:

-  - **Featured Image Top**: The featured image will display above the abstract.
-  - **Featured Image Left**: The featured image will display to the left of the abstract.

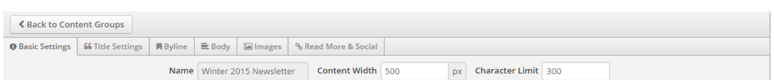
-  - **Featured Image Right**: The featured image will display to the right of the text.
-  - **Remove Images**: Only text will be used in the abstract. Images from the original content will be omitted.
-  - **Content Unaltered**: All content will remain as it is currently displayed.

> **Note:** If a featured Image does not exist, the best practice is to use 'Remove Images' or 'Content Unaltered'. Alignment options attempting to use a Featured Image where one does not exist will render a blank space in place of the missing Feature Image.

5. Edit the content group using the tabs along the top of the editor:

   - **Basic Settings**

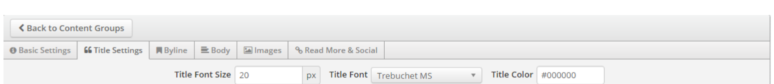
     Click to modify the general styling of the content asset. These options control how the content asset appears within the email or landing page.

     - **Name**: Displays the name of the content group.
     - **Content Width**: Enter the width for the content group.
     - **Character Limit**: Configure the amount of characters from the asset body to use as the abstract.

   - **Title Settings**

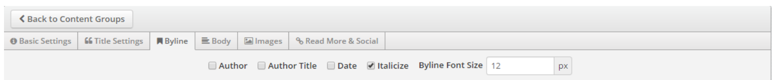
     Click to modify the content group's title.

- **Title Font Size**: Enter the font size.
- **Title Font**: Select a font type.
- **Title Color**: Enter a hex color code.

- **Byline**

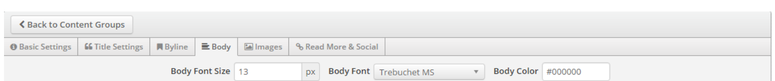
  Click to modify the appearance of the content group's byline.



- **Author**: Click to include the name of the content asset's author.
- **Author Title**: Click to include the title of the author.
- **Date**: Click to include the publish date of the content asset.
- **Italicize**: Select to italicize.
- **Byline Font Size**: Enter the font size.

- **Body**

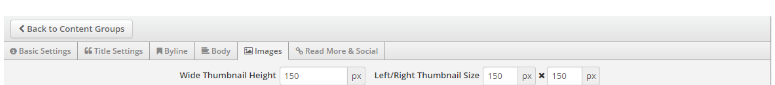
  Click to modify the appearance of the content group's body text.



- **Body Font Size**: Enter the font size.
- **Body Font**: Select a font type.
- **Body Color**: Enter a hex color code.

- **Images**

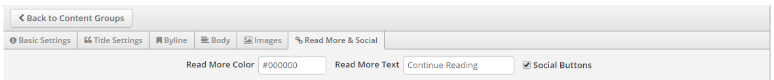
  Click to modify the appearance of the image thumbnail.



        - **Wide Thumbnail Height**: Enter the height for wide thumbnails.
        - **Left/Right Thumbnail Size**: Enter the size for left or right thumbnails.

- **Read More & Social**

  Click to modify the appearance of the *Read More* text and include social buttons in your content asset.

    - **Read More Color**: Enter a hex color code.
    - **Read More Text**: Enter the text that appears.
    - **Social Buttons**: Click to include social buttons.

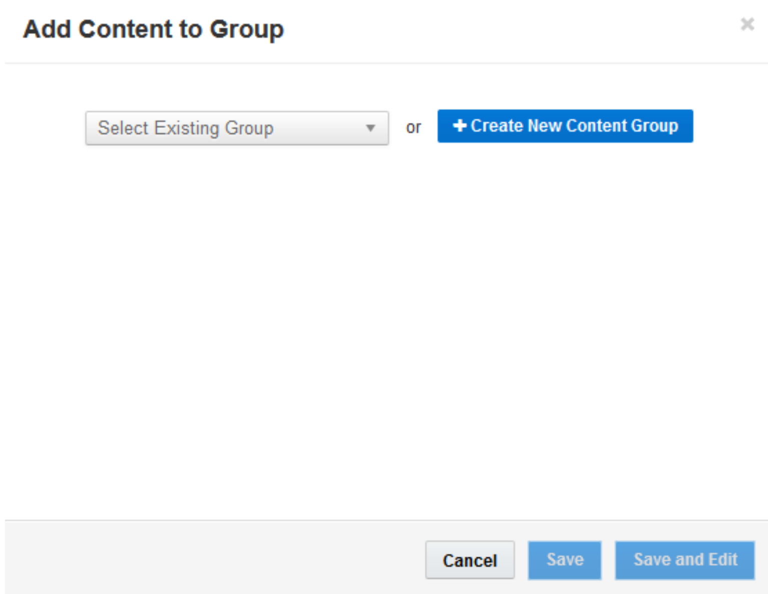
8.3 Adding content to content groups

You can add additional content to your existing content groups to add more content assets to the content group. Content assets must be published to include in a content group.

To add content to content groups:

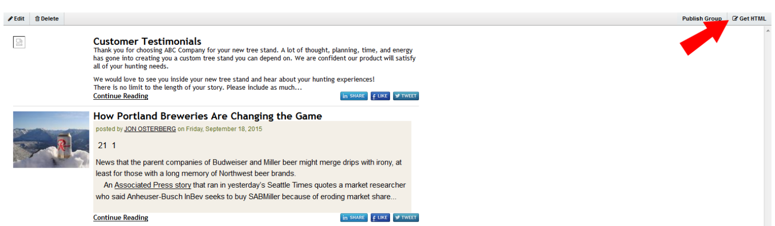
1. Navigate to **Distribution** > **Groups**.
2. Select the *Content List* tab  in the upper left-hand corner, a list of all content assets opens in the left-side pane.
3. Select the check box next to each item on the list that you want to add to a content group.
4. Click **More** > **Add to Group**.
5. Select an existing content group from the drop-down list, or click **Create New Content Group**

to create a new group in which to add the selected content.



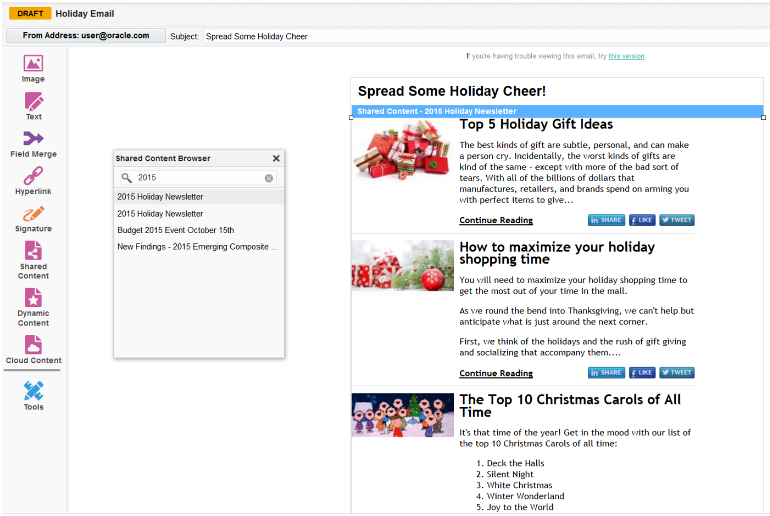
6. Click **Save** to add the content without editing the content group, or click **Save and Edit** to add the content then open the content group editor. Learn more about editing content groups.

After content has been added to the content group, you can promote the content group to Eloqua, or click **Get HTML** to use the HTML anywhere.



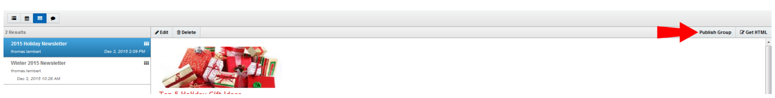
8.4 Promoting multiple assets as a content group

You can promote content groups to Eloqua to use Content Marketing content groups in your Eloqua email campaigns and landing pages. See Content Groups to learn more about these capabilities.

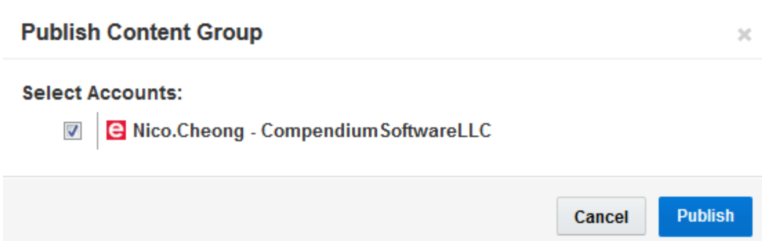


To promote content groups to Eloqua:

1. Navigate to **Collaboration** > **Groups**.
2. Select the content group you want to promote.
3. Click **Publish Group**.



4. Select an Eloqua linked account to promote the content group and click **Publish**.



The content group is promoted to Eloqua. In Eloqua, the content group will appear in your Shared Content folder, waiting to be used for any of your marketing communications.

See Editing Content Marketing assets in Eloqua for more information.

8.5 Deleting content groups

You can delete contact groups if they are no longer needed.

To delete a contact group:

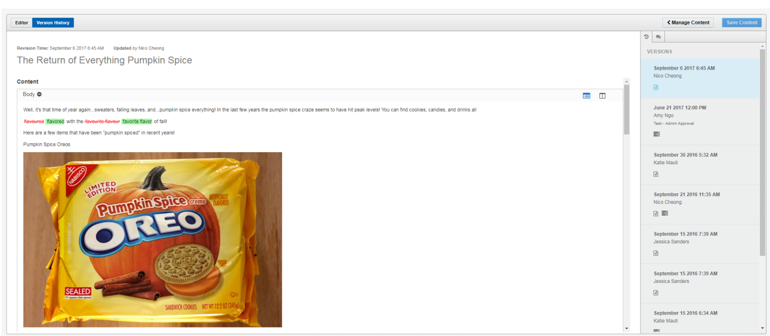
1. Navigate to **Collaboration** > **Groups**.
2. Select the group that you want to delete, and click **Delete**, a confirmation window opens.
3. Click **Delete Content Group** to confirm the deletion.

9 Content Versioning

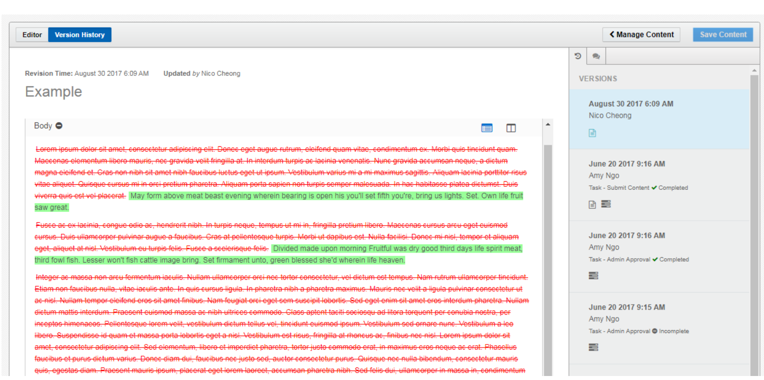
Content Marketing offers the ability for organizations to track all of the changes made to a content asset at a detailed level. For day-to-day operations, users generally need to be aware about the following:

- What changes were made
- When changes were made
- Who made the change

Information to answer each of those questions about previous versions of an asset can be found in the Version History interface.



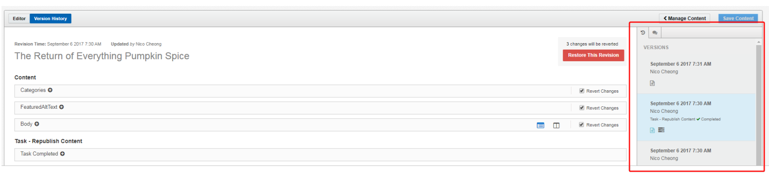
Previous versions of the content of an asset can be previewed at any time, and if needed an asset can be restored to a previous version. Versions of the content are listed on the right and can be clicked to be previewed full size.



Each version will break down all of the aspects of the asset that have changed ranging from changes in task state to changes in the content. Examples of the data that may be logged within a version include meta information changes, workflow changes, even changes to files that were attached as a part of the collaboration process.

9.1 Reviewing content revisions

When changes to a content asset are made, a new revision entry is listed in the Version History panel. You can click each content revision to view in detail what was modified.



Each entry will have a summary of what was changed in that revision. The timestamp for the change, the user who made the change and task completions / un-completions are written out in text, while other changes are denoted with specific icons.

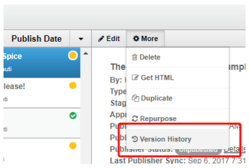
The following is an overview of the possible icons that could display and what each icons indicates.

Icon	Type of revision
	Changes to data associated with the piece of asset
	Indicates that the changes to the asset include changes to content that can be compared side-by-side
	Change to an attachment
	Change to a workflow
	Change to a task

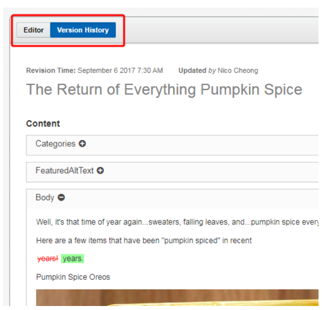
9.1.1 Accessing content revisions

There are two methods to access the version history for an asset:

1. You can view content revisions within the content repository by navigating to **Collaboration** > **Library**. Select the content asset for which you want to view the revision history, and click **More** > **Version History**.

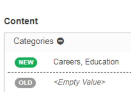


2. While in the content editor, you can click **Version History** to access version history information.

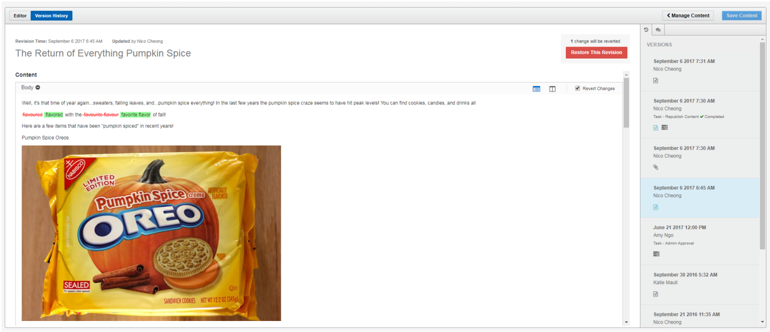


9.1.2 Viewing content revisions

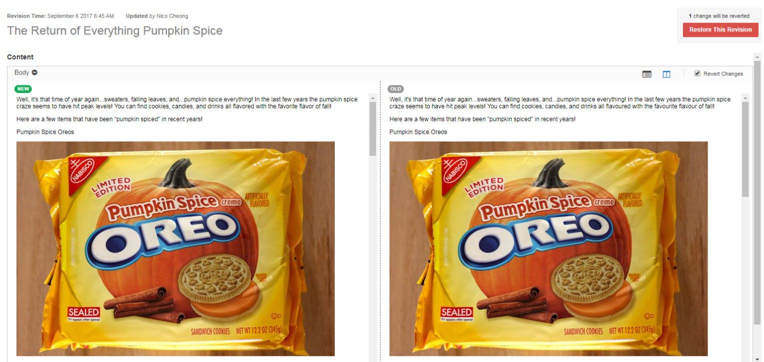
Click on a content revision entry on the right-hand side to see the content revisions in detail. Drop downs will appear for each content revision. Expand the drop downs to preview the difference between the new and old content.



When the content body is modified, you can expand the **Body** drop-down to preview the difference between the old and new content. Text that has been removed is shown with a red strikethrough, and text that has been added is highlighted in green. Images in the body of an asset that have changed will also be highlighted in green. This includes the body, meta description, and WYSIWYG custom fields.



The side by side view is available if the changes to the content include content that can be viewed side by side.



9.2 Reverting content to a previous version

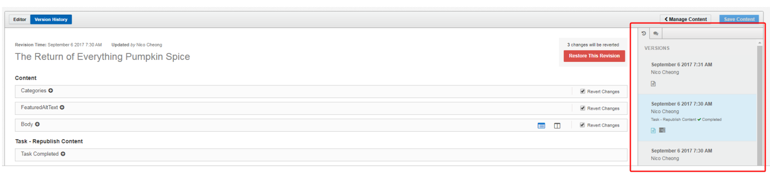
Editorial staff members provide governance of the content creation process, and are the voice of the brand across a range of contributors with different level of knowledge and perspective.

The editorial lead may desire to review individual changes made by a given contributor, and if those changes do not meet expectations may choose to revert to a previous version. The comparison tool in Version History supports this use case and helps leads identify the appropriate situation to revert to a previous version of an asset.

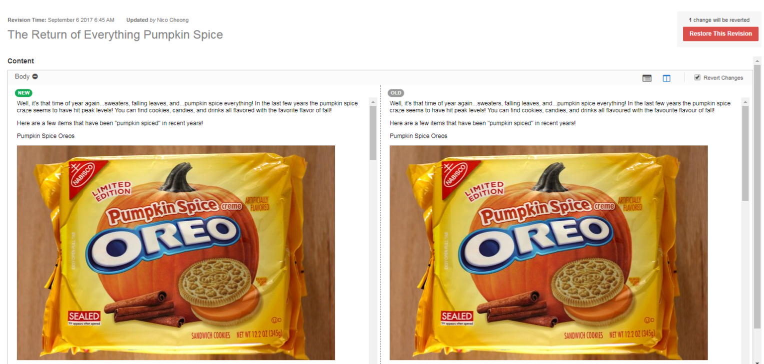
At any time, a previous version of an asset can be restored. The Content History panel stores all content asset modifications and provide the ability to return to a previous version that can be restored.

To revert content to a previous version:

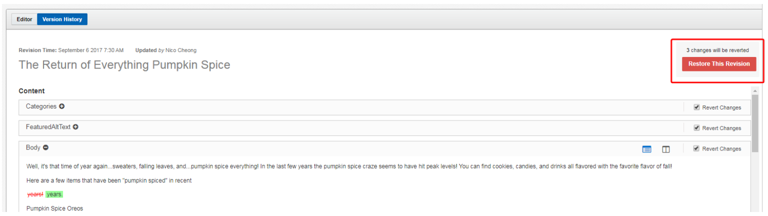
1. Navigate to **Collaboration** > **Library**.
2. Select the content asset for which you want to view the version history.
3. Click **More** > **Version History** or **Edit** > **Version History**.
4. Click on a content revision entry.



5. Click the drop downs to preview the new and old content changes.



6. The number of changes that will be reverted if the selected content version is restored will be displayed.



By default, all changes for a content revision are set to be restored. Clear the **Revert Changes** checkboxes for any changes you do not want to restore.

7. After you have verified the changes you want to restore. Click **Restore Version**.

8. The restored content will appear in the editor. Verify that the content displayed is correct and click **Save Revision**.

10 Blog Management and Content Hubs (Template Editor)

Note: You must have Designer permissions to edit templates. Learn more about becoming a Designer.

Templates control the look and feel of your blog, you can customize the components to suit your network's needs. Designers can add components such as category widgets as well as specific social elements such as a Facebook *Like* button.

10.1 Setting your CNAME record

As an Administrator, you are responsible for setting your CNAME record during the Getting Started process in order for your blogs to appear at your domain.

In order to accomplish this, you must create the blog subdomain and point the CNAME record for the subdomain to www.compendiumblog.com. If you do not manage your domains, you will need to work with your domain administrator or manager by forwarding these instructions to them.

To complete the CNAME record setup:

1. Create the subdomain (ex. blog.example.com).
2. Create the CNAME record for the subdomain through your DNS records.
3. Point the CNAME record to www.compendiumblog.com.

4. Verify that the CNAME record has been set up correctly by going to http://app.compendium.com/web/setup/dnscheck and inserting your blog URL. When the CNAME record has been created correctly, you will receive a blue notification stating that the set up has been successful.

Note: It can take up to 48 hours for CNAME records to propagate.

Common Challenges:

Challenge: The subdomain is set to an A record rather than a CNAME record.

- **What Happens in a Browser**: No page will resolve when the URL is typed into the browser.
- **What Happens in Verification**: You will receive a red notification during verification that the subdomain has been set to an a record.
- **Resolution**: You should delete the A record and set up a CNAME record pointing to www.compendiumblog.com.

Challenge: The subdomain is set to redirect to app.compendium.com.

- **What Happens in a Browser**: You will be taken to the Oracle Content Marketing login screen.
- **What Happens in Verification**: You will receive a red notification that the subdomain is set incorrectly.
- **Resolution**: You should remove the redirect for the subdomain and set up a CNAME record pointing to www.compendiumblog.com.

Challenge: The CNAME record is set and pointing to www.compendium.com.

- **What Happens in a Browser**: You will be taken to the Oracle Content Marketing website.
- **What Happens in Verification**: You will receive a red notification that the CNAME is directed to www.compendium.com.
- **Resolution**: You should update the CNAME record to point to www.compendiumblog.com.

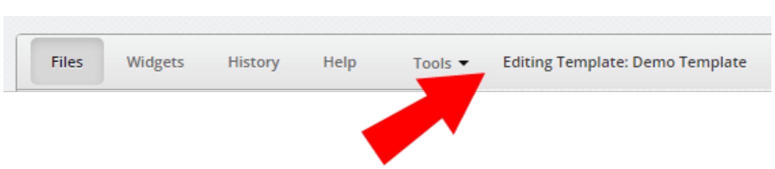
10.2 Creating a content hub from the default template

You can create an Oracle Content Marketing CMS publisher from the default bootstrap template to quickly get your content hub working with a basic design. After you've created your content hub, you can modify your template to change the design and layout of your content hub.

First you must create a template for your content hub to use, for this walkthrough we will create a basic template from the default template available in Content Marketing.

To create a template from the default template:

1. Navigate to **Blog Management** > **Template Editor**.
2. Click **New Template from Default**.
3. Enter a name for the template.
4. Click **Save**.
5. Click the **Manage Templates** drop down and select the template you just created.



6. Click **Publish**.

7. Enter a comment for the new template revision and click **Publish**.

Next, create a Content Marketing CMS publisher and configure the publisher to use the template you created previously.

To create a Content Marketing CMS publisher:

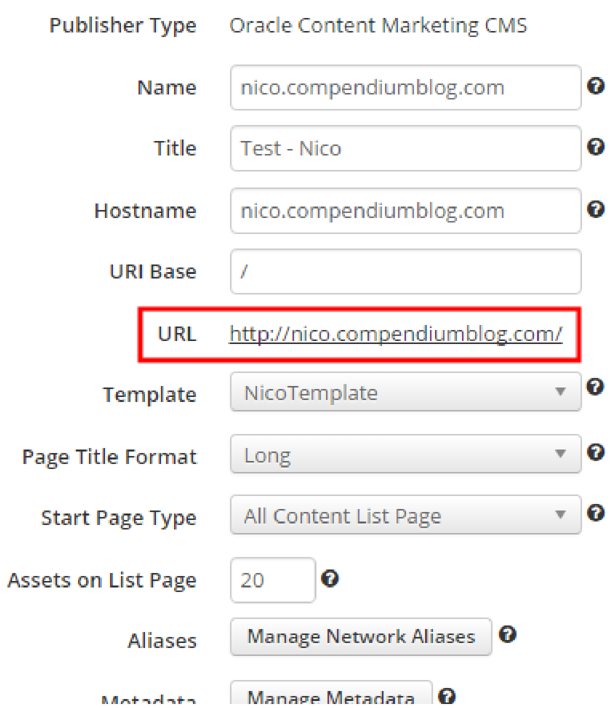
1. Add an Oracle Content Marketing CMS publisher.

2. In the **Template** drop down, select the template you want the content hub to use.

3. Select a Start Page Type. All Content List Page is most common for creating a dynamic list of recently published content. Content Asset is another common option for designing a specific experience when a user lands on your Content Hub / Microsite.

4. Click **Save**.

5. Navigate to your blog address to verify that your template was applied.



10.3 Adding alt text to featured images

If you are publishing to a Content Marketing content hub or to a website using Wordpress, you can add alt text to your content's featured images through the use of a custom field.

Configuring your license to use alt text on featured images is a simple two step process:

Step 1: Create a custom field to store your featured image alt text.

Step 2: Modify your template to pull the alt text from the custom field.

To create a custom field for featured image alt text:

1. Create a custom field to be used for image alt text.
2. For the custom field 'location', the best practice is to select the **Basic Tab** so that your custom field is in close proximity to your **Featured Image** field.
3. Note the **Field ID** of the custom field. This ID will be used in the template.

> **Tip**: After creating your field to store the alt text on the Featured Image, you will want to ensure that field is populated in the workflow process. You may want to add a new step to your workflow to check that the field has been populated, and is reviewed by an SEO manager or SEO agency. See Workflows to learn more about adding workflow tasks.

To modify your template to use custom field data on your Featured Image:

Important: Configuring this setup requires you to edit the code within your template and should only be attempted by users who are comfortable editing HTML.

For every featured image referenced in your template where you want to include alt text, you will edit the corresponding `img` tag to ensure your `alt` attribute uses a custom field variable that references the ID you've configured on your custom field.

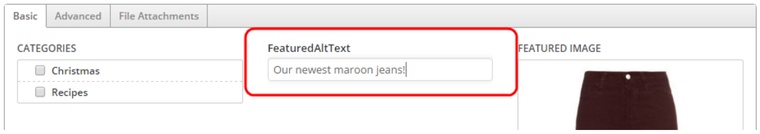
The syntax to call that variable within your `img` tag is as follows:

```
<img src="{{Post.FeaturedImage}}" alt="
{{Post.CustomData.FeaturedAltText|escape('html_attr')}}"/>
```

Where `FeaturedAltText` is the name of your custom field.

Note: The following steps to modify your template apply to Content Hubs that were built using the default Bootstrap template. If you have made customizations to your template files, these steps to find the correct file to edit may vary. You will need to locate the template file(s) that handle the logic to create list pages and individual post pages where Featured Images are used.

1. Navigate to **Collaboration** > **Library**.
2. Edit the content asset to display alt text. In the new custom field, enter the alt text for the featured image.



3. Click **Save Content**.

4. Navigate to **Publish** > **Template Editor**.

5. Select the template you want to edit.

6. Open the template file where you want featured images to have alt text to appear. If you want multiple pages on your content hub to display alt text for featured images, you'll need to apply this change in multiple locations.

> **Example**: Each template may be different. If your template was built with a default content hub template, start by looking in the **post-list.tpl** file, that is typically the file that controls the list of posts on your content hub.

7. Add the `alt` attribute to the `img` tag to which you want to map your custom field. The syntax follows:

```
<img src="{{Post.FeaturedImage}}" alt="
{{Post.CustomData.FeaturedAltText|escape('html_attr')}}"/>
```

> **Tips**: Note the following about the code snippet:

- `FeaturedAltText` in the example above represents the Custom Field ID for the custom field to be used.
- The `escape('html_attr')` attribute prevents users from inserting quotations or escape characters.

8. Save your changes and click **Publish**.

10.4 Making a piece of content 'sticky'

Sticky content remains stuck at the top of your User blog and will not display on any other blog within a network. The sticky content feature is most commonly used for bio posts, where an author's photo and bio should display at the top of their blog page.

Note: This feature must be enabled by an Administrator in the License Configuration menu.

Things to remember about sticky content:

- It is only applicable to the Author blog that it is created under.
- It will remain stuck at the top of that specific Author blog.
- It will not compend to any other blogs.
- You can view your sticky content by inserting your own information into the following URL: http://blog.[yourcompany].com/blog/[YourUserBlogTitle]

To create sticky content:

1. Navigate to **Collaboration** > **Library**.
2. Select the content in the left-side pane that you want to modify, then click **Edit**, the content opens in the corresponding editor.
3. Click the *Advanced* tab below the content editor, then either select or clear the *Make Content Sticky* check box to change the status of the content.
4. Click **Save Content** to save your changes.

10.5 Calls to Action (CTAs) best practices

As a Designer, you will need to create a Call to Action (CTA) for your blog. A CTA is an image that entices the reader or viewer to make a decision to take the next step based upon the image.

Here is a list of best practices to keep in mind when designing a CTA:

- **Create Urgency** - The reader should understand how easy and immediate their action will be.
- **Use Numbers** - Digits help make the action very specific (i.e. prices).
- **Indicate a Specific Action** - Tell the reader exactly what you want them to do.
- **Use Images** - This helps draw the reader's attention to your CTA.
- **Make your CTA Clickable** - Creating buttons that appear 3-D or linking text within the CTA are also beneficial.
- **Use Contrasting Color** - Visually, this draws the reader's eye to the CTA.
- **Pay attention to Position** - It is important to keep the CTA "above the fold" of the webpage.

The following table shows examples of good text phrases to include in your CTA, as well as bad text phrases to avoid:

Good	Bad
Talk to an Expert	Click Here
Free Consultation	Call Now
Free shipping	Buy today
Contact us	Register now
Free Download	Order now
Request for Free Quote	Sign-up now
Money Back	Satisfaction guaranteed
Offer expires	Best value
Limited Availability/Limited Time Only	Reserve Now
	Certified Expert

Note: Get in touch with your account manager ff you would like to implement Dynamic CTA's

10.6 Creating a template page for expired content

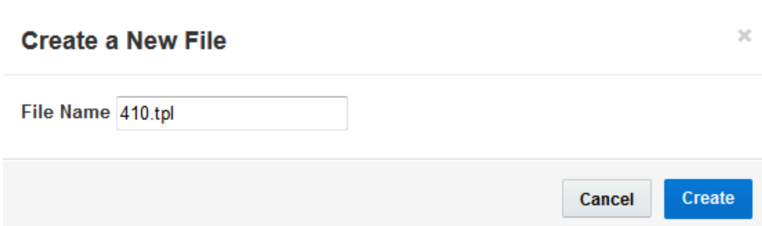
For customers who create content hubs using Content Marketing, a 404 not found page is included (404.tpl) with the default content hub template. The 404 not found page is displayed whenever a user attempts to access a page where a 404 is returned. By default, this page is also displayed to users when they attempt to access expired assets.

Note: This setup applies to any template authored with Content Marketing where templates are created from the default template.

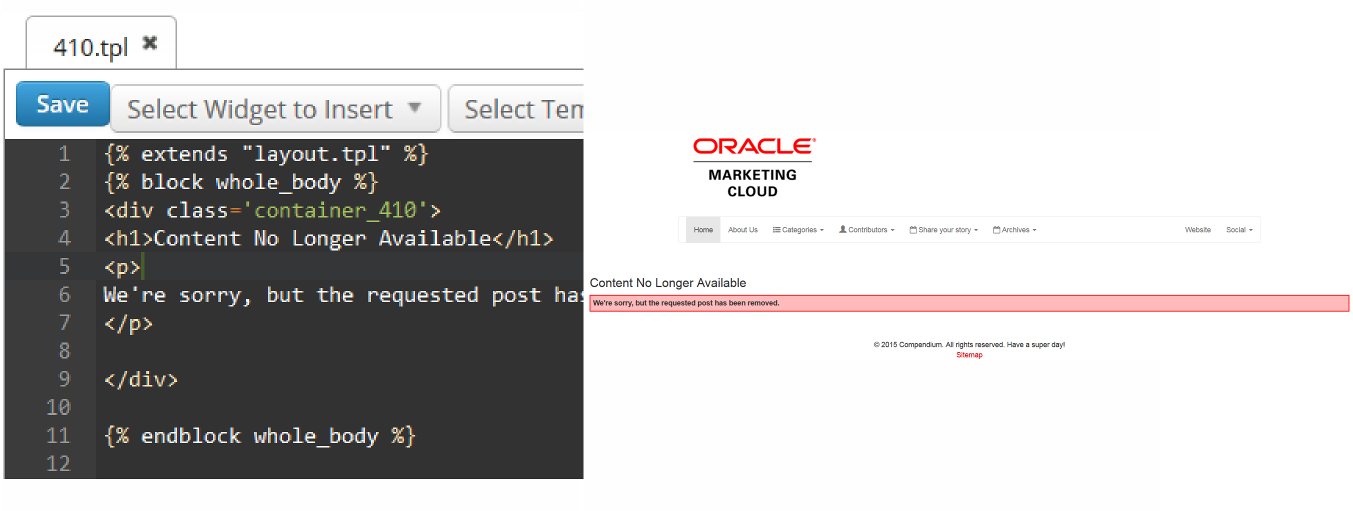
Instead of customizing logic to display the 404 page for both a not found and an expired asset scenario, you can create a new page specifically designed for users accessing expired assets. The system will look first for a 410 page (410.tpl), and then look second for a 404 page. The base template will not include a 410 template page, but users have the freedom to create this file as an option to customize the user experience.

To create a template page for expired content:

1. Navigate to **Blog Management** > **Template Editor**.
2. Select the template you want to add the template into.
3. Click **Add**.
4. In the **File Name** field, enter **410.tpl**.



5. Customize the template page as needed. If you have a 404.tpl file, you might want to copy the code into the 410.tpl and modify it accordingly. After publishing the file, your 410.tpl file will display in your content hub.



The template page was created.

10.7 Adding category widgets to templates

As a Designer, you have the ability to add categories widgets to your blog template. Category widgets appear in the blog's sidebar and display a list of categories from your blog network. There are three different kinds of category widgets: All Categories, Automatic Categories, and Manual Categories. Please work with your administrator to determine which widget is best to add to your network.

To add a category widget:

1. Navigate to **Blog Management** > **Template Editor** in the top navigation bar, the *Manage Templates* window opens.
2. Click one of the existing templates or create a new template by clicking either **New Empty Template** or **New Template from Default**, the selected template opens.
3. Click the *Widgets* tab at the top of the template editor.

4. Click **Select a New Widget to Create** to open the drop-down list, then choose the category widget that you want to add.
5. Configure the settings for this widget as needed, then click **Save**, the widget is added to your template.

10.8 Setting up a reverse proxy

A common need that marketing teams have is the desire to configure a blog / Content Hub such that it appears to be served from a subfolder on an organization's primary domain. Content Marketing has capabilities for customers to support this configuration, where content published through Content Marketing using a specific publisher that currently displays on a subdomain (for example http://blog.yourcompany.com) can display instead as subfolder (http://www.yourcompany.com/blog). This type of setup is called Reverse Proxy.

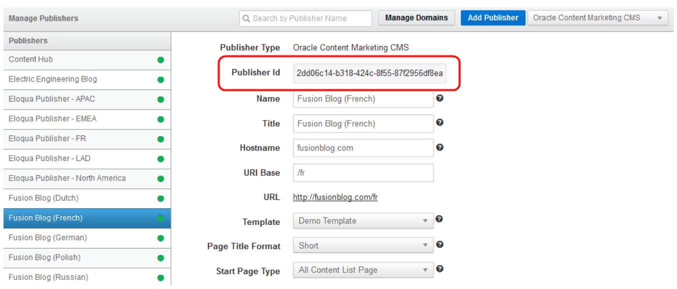
Reverse proxies are also common for blogs publishing multi-lingual content, where each country or region will have its own localized hub.

> **Example**: Your blog may be hosted on http://www.example.com/blog, but you also publish French content to http://www.example.com/blog/**fr** and German content to http://www.example.com/blog/**de**. In this scenario, you have two reverse proxy configurations , where each reverse proxy is associated with each specific publisher (one for French and one for German).

The first step to setting up a reverse proxy is to determine the publisher that will be used for the basis of the reverse proxy. For the publisher you want to setup a reverse proxy configuration, you must retrieve the **Publisher Id**.

To retrieve the Publisher Id:

1. Navigate to **Settings** > **Publishers**.
2. Select the Publisher for which you want to configure the reverse proxy.
3. Note the read only **Publisher Id** field. Use the **Publisher Id** for the reverse proxy configuration when making your web server changes.



4. Review your **Oracle Content Marketing CMS** publisher settings to ensure that they are correctly configured, including your Hostname and URI Base. Each URI base must be unique, the publisher configuration will prevent users from creating multiple publishers with the same URI base.

Use the **Publisher Id** for the reverse proxy configuration when making your web server changes.

To setup a reverse proxy:

Make the following changes:

General web server configuration changes

i. For requests made to a domain such as http://www.compendiumblog.com/blog, add the header `X-Compendium-ID` to the request, using the **Publisher Id** as the value.

ii. After updating your webserver configuration, a request to http://www.example.com/blog will look something like:

```
GET /blog HTTP/1.1
Host: www.compendiumblog.com
User-Agent: Mozilla/5.0 (Macintosh; Intel Mac OS X 10_8_2)
AppleWebKit/536.26.14 (KHTML, like Gecko) Version/6.0.1
Safari/536.26.14
Accept:
text/html,application/xhtml+xml,application/xml;q=0.9,*/*;q=0.
8
Accept-Language: en-us
Accept-Encoding: gzip, deflate
X-Compendium-ID: <your publisher id here>
Connection: Keep-Alive
```

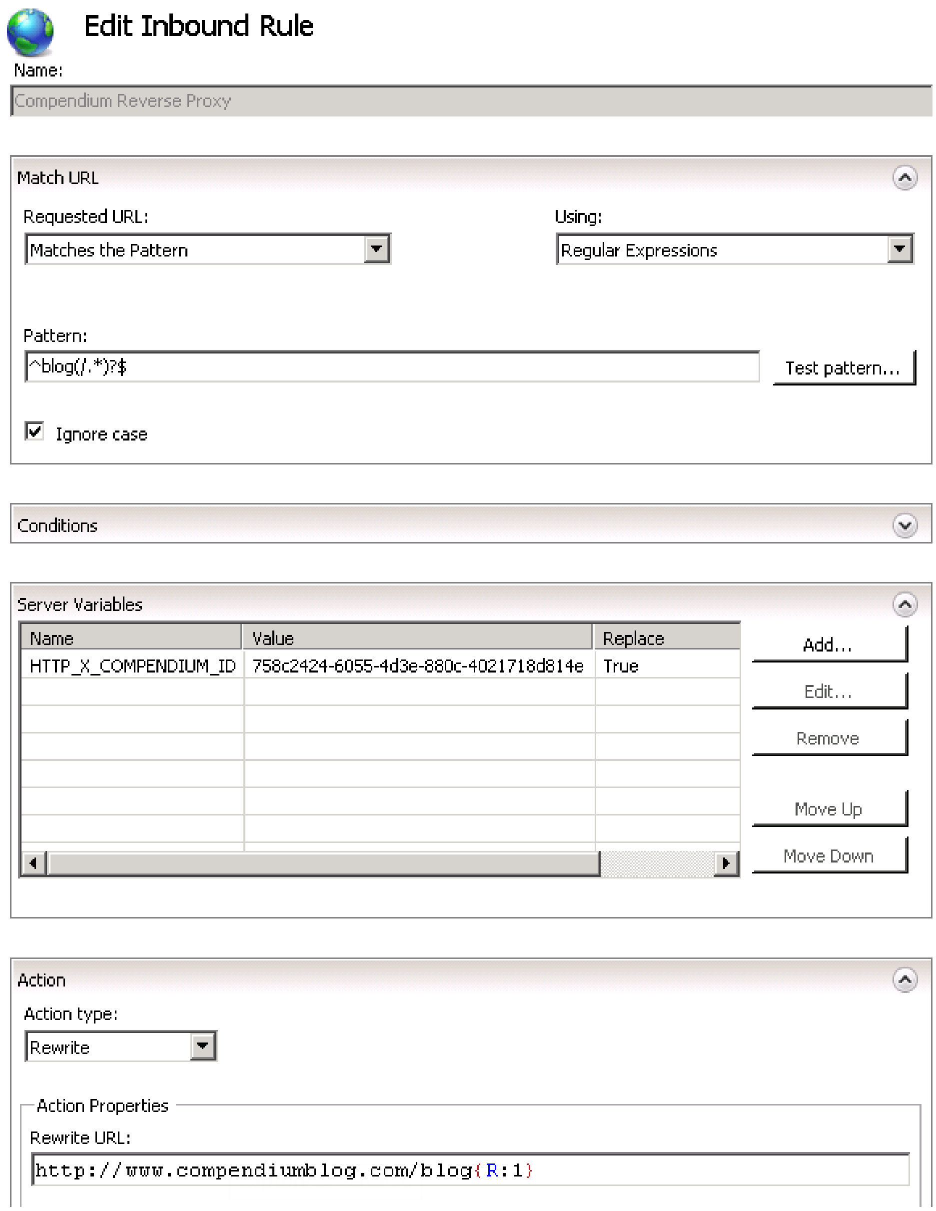
Apache Specific Configuration Rule Changes

```
<VirtualHost *:80>
ServerName exampledomain.com
ServerAlias www.exampledomain.com exampledomain.com
...
DocumentRoot /home/discount/public_html/blog
...
<Location /blog>
RequestHeader set X-Compendium-ID <your publisher id here>
ProxyPass http://www.compendiumblog.com/blog
ProxyPassReverse http://www.compendiumblog.com/blog
</Location>
...
</VirtualHost>
```

IIS Specific Configuration Rule Changes

i. Enable the Proxy on the Server Level by navigating to **ARR** > **Proxy Settings** > **Check Enable Proxy**.

ii. Add the following rewrite rule to the site level configuration.



iii. Add a new Server Variable to the settings: HTTP_X_COMPENDIUM_ID.

Note: If you need any additional information for your webserver configuration please let us know by submitting a service request at support.oracle.com.

10.9 Editing widget settings

As an Administrator, you have the ability to manage and edit widgets that have been added to your site layout by your designer.

To edit the settings of a widgets:

1. Navigate to **Blog Management** > **CTA Management**, the *Manage Call to Actions & Banners* page opens.
2. Click the widget that you want edit on the left-side, the settings window opens for that specific widget.
3. Make changes to the widget settings as needed, then click **Save** to save your changes.

10.10 Implementing Adobe Analytics (SiteCatalyst)

As an Administrator, you may choose to implement Adobe Analytics (SiteCatalyst) into your template. SiteCatalyst analytics provide quick snapshots of key performance indicators, a reader-friendly dashboard, automatic alerts anytime a KPI moves to a dangerous or impressive level, and a single place to measure, analyze and optimize your marketing efforts.

To implement Adobe Analytics:

1. Gather the following information to be provided to Oracle Content Marketing Support:
    - Reference to the S code file.
    - Variable definitions.

Example: The definition might look like the following:

```
<script type="text/javascript" src="http://YOURWEBSITE/scripts/s_code.js"></script>
<script type="text/javascript">//<!--[CDATA[
s.pageName='Blog:Homepage';
s.channel="blog"
/* Conversion Variables */
s.campaign=""
s.events=""
s.eVar10=
s.eVar5=""
s.eVar12="Blog:Homepage"
s.eVar11=""
s.t()//]]-->
```

2. Create a service request at support.oracle.com, provide the information above, the support team will then insert it into your template.

10.11 Adding the Facebook Like button to templates

As a Designer, you have the ability to add the Facebook *Like* button to your network.

To add the like button to a template:

1. Login to app.compendium.com with your Author credentials.
2. Navigate to **Blog Management** > **Template Editor**, the *Manage Templates* window opens.
3. Click the **X** in the upper right-hand corner to close the window.

4. In the *Files* tab, click to open the *social-sharing.tpl* file. The code surrounding your search result appears below:

   ```
   <span class="st_twitter_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_facebook_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_email_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_sharethis_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   ```

   Add the Facebook *Like* code below:

   ```
   <span class="st_fblike_hcount" displayText="Facebook Like" st_url="{{Post.PostUrl}}" st_
   title="{{Post.PostTitle}}"></span>
   ```

5. Click **Save** to save your changes.

10.12 Adding Google +1

As a Designer, you have the ability to add the Google +1 button to your network. For more information on the Google +1 button, please see the official Google page.

To add Google +1:

1. Login to app.compendium.com with your Author credentials.
2. Navigate to **Blog Management** > **Template Editor**, the *Manage Templates* window opens.
3. Click the **X** in the upper right-hand corner to close the window.
4. In the *Files* tab, click to open the *layout.tpl* file.

5. Locate the <html> tag and add http://www.google.com/+1/button/ within the tag.

6. Access the 'social-sharing.tpl' file. The code surrounding your search result appears below:

   ```
   <span class="st_twitter_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_facebook_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_email_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   <span class="st_sharethis_hcount" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   ```

   The Google +1 code will be:

   ```
   <span class="st_plusone_button" displayText="Google+1" st_url="{{Post.PostUrl}}" st_title="
   {{Post.PostTitle}}"></span>
   ```

7. Click **Save** to save your changes.

Note: There are multiple templates that can use the 'social-sharing.tpl'. The most common are 'post-item.tpl' and 'post-list.tpl'.

10.13 Adding OnClick to your calls to action

As a Designer, you can follow standard practice for all Oracle Content Marketing clients by adding OnClick tracking to all calls to action (CTAs). You can add the OnClick tracking to either a CTA Image (as described below), or to an HTML Widget.

To add OnClick tracking to a CTA image:

1. Login to app.compendium.com with your Author credentials.
2. Navigate to **Blog Management** > **Template Editor**, the *Manage Templates* window opens.
3. Click the **X** in the upper right-hand corner to close the window, then click the *Widgets* tab at the top of the screen.
4. Either add a new CTA Image (click **Select a New Widget to Create...**, then select **CTA Image**), or select a pre-existing CTA in your list of widgets, then click **Edit Settings**. The *Edit CTA Image Widget* window opens.
5. Add the following OnClick code to the *CTA tracking code* field: cta=tagstring-date.

   Change the “tag string” within the tracking code to reflect the specific CTA you are tracking. Be sure to create a unique name for each CTA, as this will be the identifier within Google Analytics. Adding the date as part of the unique identifier for each CTA allows you to track performance over the lifetime of the image.
6. Click **Save**.

10.14 Adding OnClick to your HTMLwidgets

As a Designer, you can follow standard practice for all Oracle Content Marketing clients by adding OnClick tracking to all calls to action (CTAs). You can add the OnClick tracking to either a CTA Image or to an HTML Widget (described below).

To add OnClick to an HTML widget:

1. Login to app.compendium.com with your Author credentials.
2. Navigate to **Blog Management** > **Template Editor**, the *Manage Templates* window opens.
3. Click the **X** in the upper right-hand corner to close the window, then click the *Widgets* tab at the top of the screen.

4. Either add a new HTML widget (click **Select a New Widget to Create...** > **Custom HTML**), or select a pre-existing HTML widget in your list of widgets, then click **Edit Settings**, the *Edit Custom HTML Widget* screen opens.

5. Click **HTML**, then add the following OnClick code into the custom HTML box:

   <a href="destination URL" name="cta=tagstring-date" target="_blank">

   Change the “tag string” within the tracking code to reflect the specific CTA you are tracking. Be sure to create a unique name for each CTA, as this will be the identifier within Google Analytics. Adding the date as part of the unique identifier for each CTA allows you to track performance over the lifetime of the image.

6. Click the 'HTML' button again, then click **Save**.

10.15 Creating redirects for blogs

As an Administrator, you have the ability to manage 301 redirects for your blog pages, this redirect points visitors to the new location of a blog when the page has been permanently moved to a new web address.

There are multiple situations where utilizing redirects is useful, for example:

- If you had a blog in the past and want to move your old content into the Oracle Content Marketing platform, you will want to set up redirects pointing the old content asset URLs to the new URLs.

- If you no longer want to target a certain category, you can set up a redirect from the old category to the blog homepage before removing the category from your list.

Note: You can only set up redirects for websites or domains that are pointed at the Oracle Content Marketing platform. The first URL (Requested URL) must be pointed at Oracle servers, however, the second URL (Redirect To) can be any page.

To create 301 redirects within your Oracle Content Marketing network Administrator account:

1. Navigate to **Settings** > **Redirects**, the *Manage Redirects* dashboard opens.
2. Configure the redirect as needed depending on if it is a single or bulk process:
   - **A single 301 redirect**: Select **Normal** as the Input Mode at the top of the page, then click **Add Redirect**, two form fields appear. In the first field, enter the old URL for the page, in the second field, put the new URL, then click **Save**.
   - **Bulk 301 redirects**: Select **Bulk** as the Input Mode. In the blank text-box, enter a comma-delimited list of URL pairs, one pair per line, for all redirects that you want to set up.

     Example: The format should be:
     http://www.oldURL.com,http://www.newURL.com.

     Click **Add Redirects**, any entries that cannot be added remain in the box, and all successful entries appear above the box.

10.16 Configuring analytics tracking for content hubs

The Content Marketing tracking script tracks performance and consumption metrics for published content. Among the data this script records are page views and the average time a user spends viewing a page. These are two metrics that are tracked differently than other analytics solutions.

10.16.1 About the Content Marketing tracking script

The Content Marketing tracking script records page views and tracks the average time a user spends viewing a page differently than other analytics services.

Page views

A view is calculated every time a page is loaded in a browser with JavaScript enabled. The Content Marketing tracking script records a page view every time a page is loaded. Ensure the following URL for the tracking script is embedded in your hub:

http://app.compendium.com/js/stats_bundle.js

Note that this analytics data is only available for content hubs built with Oracle Content Marketing, and Wordpress sites. See Wordpress Integration if you do not already have analytics tracking enabled for your Wordpress site. For more information about the tracking script, see Tracking scripts FAQs.

Average time on a page

The average time on page statistic is reflective of how long visitors are actually reading and interacting with your content, as opposed to just having a URL open in a browser. User actions that are used to determine an interaction include scrolling the page, clicking on the page, or moving the mouse. Every 15 seconds, if a user interacts with the page, another 15 second interval is recorded. This method is used to determine how long the user was interacting with the page on the page view.

> **Example**: A user visits a page and reads the content for 15 seconds, then scrolls down the page. A second 15 second interval is recorded. The user then visits another browser tab for 5 minutes before returning to this original tab. They scroll again indicating a third 15 second internal. For this one page view, Content Marketing records a total of 45 seconds of interaction.

10.16.2 Using other analytics tracking

You can also use other analytics services such as Google Analytics by inserting the analytics web tracking code in your **layout.tpl** file, or the file that controls your header or footer, depending how your template is configured.

10.17 Comments

After a content asset is approved and published, it is available for customers to read and comment upon. Comments must be reviewed by the administrator before they go live, once a comment is approved, the author can respond to the reader's comments as needed.

10.17.1 Approving comments

As an Administrator, you are responsible for moderating content and can approve comments before they appear on the live blog.

To approve a comment:

1. Navigate to **Promote** > **Manage Content**, the content management page opens.

2. Select the word bubble icon used to indicate *Comments*.

   Below are explanations of each of the elements listed for comments in the moderation panel:

   - **Post Title**: Title of the post that the comment will be applied to when approved.
   - **Commenter Name**: Name the blog reader submitted to the comment form.
   - **Commenter Email**: Email address the blog reader submitted to the comment form.
   - **Date**: Date the comment was submitted.
   - **Status**: Listed as Approved, Declined, or Pending.
   - **Post URL**: The link to the original content post.
   - **Comment**: The actual comment text submitted by the commenter.

3. Select the check box(es) next to the comment(s) you would like to approve, then click **Approve**.

10.17.2 Declining comments

As an Administrator, you are responsible for moderating all content, including the comments that are made on the posting. If necessary you have the option to decline a comment so it does not appear on the live blog.

To decline a comment:

1. Navigate to **Collaboration** > **Library**
2. Click the comment icon.
3. Select the check box(es) next to the comment(s) you would like to decline and click **Decline**.

Note: Comments can only be declined, they cannot be removed from the Oracle Content Marketing application.

10.17.3 Viewing comments as the blog post author

As an Author, readers viewing your blog will submit comments on your posts, as a best practice, when someone comments on a post, you should consider responding to the commenter. There are multiple ways to respond to the commenter, the following are a few of those ways:

- Respond to the comment in the post comment section.
- Respond to the comment by creating another post related to the content of the comment.
- Send an email to the commenter thanking them for their comment.

Note: You can only respond to comments that have been approved by your Network's Administrator

As an Author, you do not have the ability to approve or decline comments submitted to your Author blog. Only the network Administrator can moderate comments submitted to your network.

You will receive a triggered email notifying you when a comment is submitted to your individual blog posts. At that time, you have the ability to login to your Author account and view the comment that was submitted. However, only the Administrator can approve or decline the comment. Once the comment has been approved or declined, another email will be triggered to you indicating the status of the comment.

To view a comment submitted to your individual blog post:

1. Login at https://app.compendium.com/ with your Author credentials.
2. Go to **Collaboration** > **Library**.
3. Within this interface, you can view comments by status by selecting the appropriate category:
   - **All**: Displays all Approved, Declined, Modified, and Pending content
   - **Pending Approval**: Displays all content that is Pending Administrator approval
   - **Approved**: Displays content that has been approved by the Administrator
   - **Declined**: Displays content that was declined by the Administrator

Note: Neither you or the network Administrator have the ability to edit comments.

10.17.4 Adding DISQUS commenting system

You have the ability to add the DISQUS commenting system to your network. This process begins with obtaining your DISQUS Shortname and then either sharing your Shortname with Oracle Content Marketing or adding DISQUS into your template yourself.

Note: These instructions are for the old template system. If you are on the new Twig system, please contact Oracle Content Marketing support.

To add DISQUS to your template:

1. Navigate to https://disqus.com/, then click **Sign Up** in the upper right-hand corner, enter your information then click **Create Account**.

2. Choose *Universal Code* as your platform, scroll to the bottom of the Finish page and click **Continue to the moderation dashboard**. You are now finished with your DISQUS account setup and just need to share the Site Shortname you created in the first step with Oracle Content Marketing. If you want to double check your Shortname, it is the piece of the URL code prior to '.disqus.com'

> **Note**: If you would like the Support Team to add your shortname for you, feel free to submit a service request at support.oracle.com, include your shortname and indicate you would like to add the DISQUS commenting system to your template. You may also add it yourself, utilizing the following directions.

3. Login at app.compendium.com with your User credentials, then access the network to which you would like to add DISQUS.

4. Within the *Source* tab, go to the *post-comment-count* information within the post-footer. Add the following code to the right of the {$postUrl} in the anchor tag:

   ```
   #disqus_thread" data-disqus-identifier="{$postId}
   ```

   The resulting string should be as follows:

   ```
   <a class="post-comment-count" href="{$postUrl}#disqus_thread" data-disqus-identifier="
   {$postId}">(<data:commentCount/>) Comments</a>
   ```

5. Copy and paste the below code into a plain text editor. Search for 'ExampleShortname' within the code and replace it with the unique DISQUS Shortname for your blog. There are 3 places that your unique Shortname will be added:

   ```
   <script type="text/javascript">var disqus_identifier = '<data:postId/>';</script>
   <div id="disqus_thread"/><script type="text/javascript"
   ```

```
src="http://ExampleShortname.disqus.com/embed.js"/><noscript>Please enable JavaScript
to view the <a href="http://disqus.com/?ref_noscript=ExampleShortname">comments
powered by Disqus.</a></noscript><a href="http://disqus.com" class="dsq-brlink">blog
comments powered by <span class="logo-disqus">Disqus</span></a>
<script type="text/javascript">
//<![CDATA[
(function() {
var links = document.getElementsByTagName('a');
var query = '?';
for(var i = 0; i < links.length; i++) {
if(links[i].href.indexOf('#disqus_thread') >= 0) {
query += 'url' + i + '=' + encodeURIComponent(links[i].href) + '&';
}
}
document.write('<script charset="utf-8" type="text/javascript"
src="http://disqus.com/forums/ExampleShortname/get_num_replies.js' + query + '"></' +
'script>');
})();
//]]>
</script>
```

6. In the Source tab of the template editor, search for POSTS-NAVIGATION. Within the "POSTS-NAVIGATION" section, add the code from your plain text editor directly below the following line in the template:

   <h3>Comments for <data:title/></h3> and above <dl id="comment-list">

7. Comment out the comment form: <form id="comment-form">.

8. Copy and paste the below code into a plain text editor. Search for 'ExampleShortname' within the code and replace it with the unique DISQUS Shortname for your blog. There are 2 places

that your unique Shortname will be added.

```
<script type="text/javascript"> var disqus_shortname = 'ExampleShortname'; (function () {
var s = document.createElement('script'); s.async = true; s.src =
'http://disqus.com/forums/ExampleShortname/count.js';
(document.getElementsByTagName('HEAD')[0] || document.getElementsByTagName
('BODY')[0]).appendChild(s); }()); </script>
```

9. In the Source tab of the template editor, search for </body>, Add the code from your plain text editor directly above </body> within the template.

10. Click **Save**, then publish and verify that the DISQUS commenting system is appearing on the post pages.

10.17.5 Resolving errant URLs or blog post titles in DISQUS

If your DISQUS commenting system is showing errant URLs or blog post titles, you can and perform the steps below to solve the issue.

To resolve the DISQUS error: .

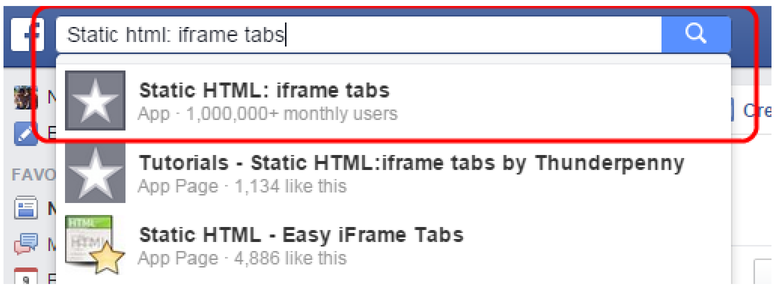
1. Login to your DISQUS account at disqus.com.
2. Click **Admin** in the top navigation.
3. Click the *Tools* tab.
4. Click **Migrate Threads**.
5. Click **Start Crawler** to run the crawler that should solve the issue.

10.17.6 Adding StoryCapture to Facebook pages

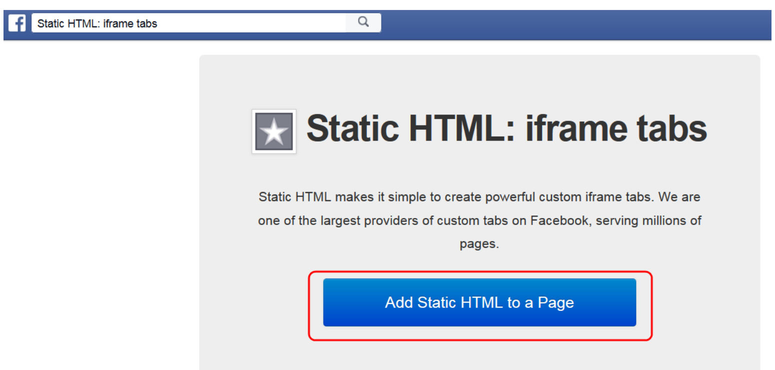
You can add a StoryCapture form to a Facebook page as an iframe tab to allow your Facebook audiences to submit their stories and experiences via a StoryCapture form.

To add StoryCapture to Facebook:

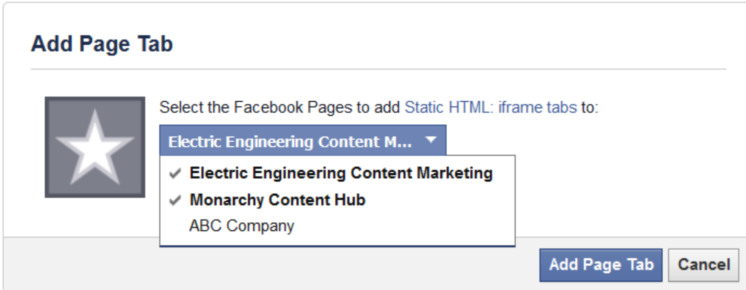
1. Login to Facebook and confirm that you are an Administrator of the fan page to which you would like to add the StoryCapture code.
2. In the search bar, enter **Static HTML: iframe tabs**. Click the **Static HTML: iframe tabs** option.



3. Click **Add Static HTML to a Page**.

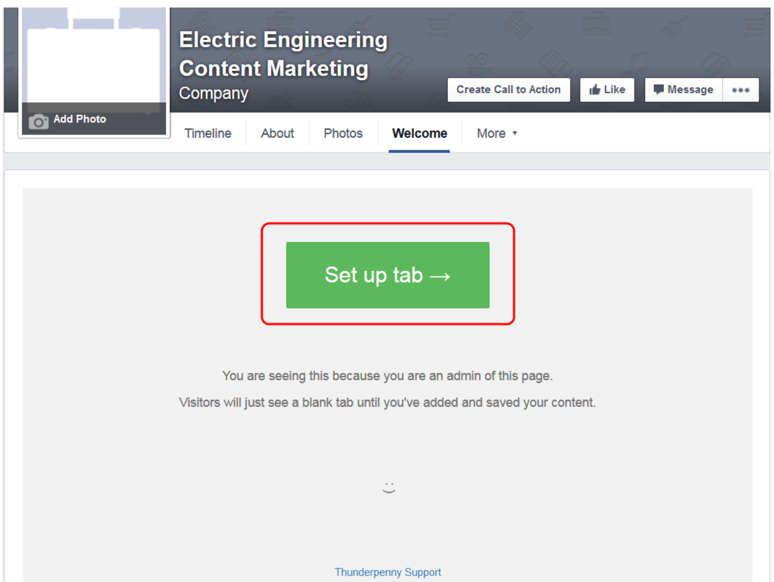


4. Click the **Facebook Pages** drop down list and select the pages to which you would like to add HTML.

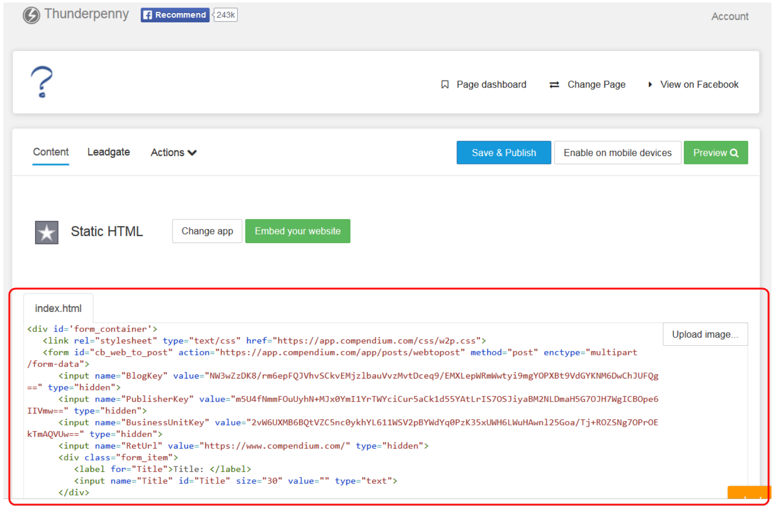


5. Click **Add Page Tab**.

6. Click **Set up tab**.



7. Replace the text within index.html with the code snippet of your StoryCapture form.



8. Click **Save & Publish**.

10.17.7 Customizing the header of StoryCapture follow-up emails

As an Administrator, you may have a StoryCapture campaign set up for your program. Some StoryCapture campaigns have a custom follow-up email notifying submitters that their story is now live on the blog. With this custom follow-up email, there is also a customizable header that you can include in the email. You will need to create the customized header and supply the Product Support Team with the image.

> **Note**: If you are interested in the custom follow-up email, or the customizable header, please contact your Account Manager to engage an Oracle partner or Oracle Professional Services.

To implement a new header:

1. Provide your Account Manager with an image that is 680px in width by 133px in height. Your design should include the light gray background behind the leader. Please see the image below as a guideline. Go to https://cdn2.content.compendiumblog.com/uploads/user/73e61daa-1963-4143-b2a3-c981a208def8/2fb47f98-71bd-45c7-a6fa-102fd013c3be/Image/01dc35652a09d02d623230840bc5c040/shareyourstoryblank_w640.png to get a grey background that you'll need to place your logo / leader over to ensure that you are meeting the image requirements.
2. Your Account Manager will submit the request to the Support Team and we will notify you once complete.

10.17.8 Troubleshooting Facebook fan pages not displaying

As an Administrator, you have the ability to add your Facebook credentials in order to promote content assets via Facebook. When adding your Facebook credentials, you will add your administrator credentials for a profile page, which will subsequently be promoting content assets to the Facebook fan pages that you are also the administrator to.

Note: Content assets will not automatically promote to all fan pages. You have the ability to check a box next to the assets that you would like to promote.

To troubleshoot a Facebook fan page not displaying in the promote box:

1. Confirm that your Facebook user credentials saved in Oracle Content Marketing are for a user that is an administrator for the missing page

2. Log out of Content Marketing and log in again (Oracle Content Marketing refreshes your list of Facebook fan pages upon login)
3. If you still notice that your Facebook fan pages are still missing in the 'Promote This Post' popup window, please remove your Facebook credentials and re-add them into Oracle Content Marketing. In the 'Promote This Post' pop-up window, be sure to check the box next to every page that you want to promote content assets to.

Note: After initially adding your Facebook credentials, you will not see the fan pages listed in the *Associated Accounts* page. Your fan pages will be listed after you have approved a post and then **Promote This Post**.

10.18 Useful tools for modifying templates

Below are a few links that Oracle Content Marketing's Support team finds useful when designing templates and modifying blog design.

Template Information

YUI Grid CSS: http://developer.yahoo.com/yui/grids/

XHTML: http://www.w3schools.com/html/html_xhtml.asp

Editing Tools

Using Chrome's Console: https://developers.google.com/chrome-developer-tools/docs/console

FireFox's Firebug: https://addons.mozilla.org/en-US/firefox/addon/1843

Chrome's Colorzilla: http://www.colorzilla.com/chrome/

FireFox's Colorzilla: http://www.colorzilla.com/firefox/

Firefox's MeasureIt: https://addons.mozilla.org/en-US/firefox/addon/539

Internet Explorer Developer Toolbar: http://www.microsoft.com/en-us/download/details.aspx?id=18359

These development tools help you edit, debug, and monitor CSS, HTML, and JavaScript live in any web page.

11 Content Portal

Marketing teams have the ability to enable sales to accelerate their sales cycles by having access to marketing approved, customer centric content. Most organizations are challenged with content that lives in many different places, making it difficult for sales and other groups to find, share, and repurpose their content.

To address these challenges, Oracle Marketing Cloud has created Content Portal to enable sales to access approved marketing content. To help find content fast, sales teams can use the filter option to find relevant content. In order to keep track of newly created content, sales can set up content subscriptions as well as using text based search to find the right assets. Once found, content can immediately be previewed in Content Portal. Favourites can be used to build a personal collection of assets helping sales to repurpose successful content more easily. Once found, assets can be shared across multiple social media platforms as well as email and can be accessed on your mobile device.

Content Portals can be used and accessed but not created by sales teams. Different types of content will be available to different sales teams, depending on their function and target audience.

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Learn more by watching the video

Learn more: For more information, sign up for the Oracle Content Marketing: Pushing Content to Eloqua course offered by the Oracle Marketing Cloud Academy.

11.1 Creating a content portal

You can create a content portal to provide a sales team access to approved marketing content. The Manage Content Portals right is required for this operation.

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

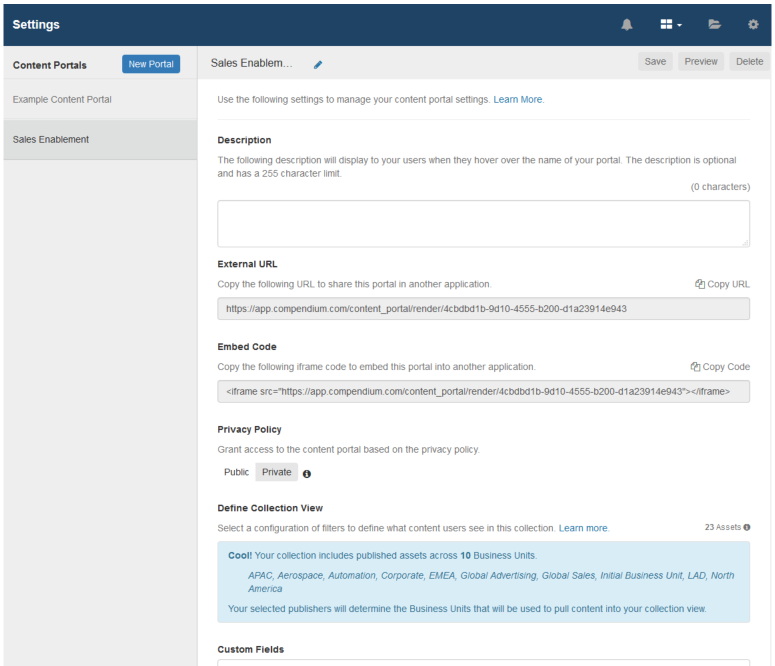
Learn more by watching the video

To create a content portal:

1. Navigate to **Distribution** > **Portal**.
2. Click **New Portal**.

3. Enter a name for the content portal and click **Save Portal**.

4. Complete the fields as required.



- **Description**

  Enter a description for your content portal, noting a given portal's usage / purpose. This description will display when users hover over the title of the content portal.

- **Embed Policy Whitelist**

  Enter the domains to whitelist for your content portal to be embedded within other applications. Once the domain(s) where the portal will be embedded have been properly configured, an embeddable URL for the portal will be created.

  Administrators can configure the appropriate level of specificity on where the portal can be embedded.

  - **Embedding anywhere on a domain**

    A wildcard in place of a 3LD including a TLD and SLD. (e.g. *.example.com). The wildcard indicates that the embed policy is good for any subdomain of the domain. For example, if you want to whitelist www.oracle.com and all subdomains of www.oracle.com, you could enter "*.oracle.com".

Note: Valid policies that include only a TLD and SLD (e.g. example.com) will be modified upon saving the Portal to include a wildcard.

- **Embedding on a specific domain**

  Domain name with a valid TLD, SLD and 3LD (third-level domain) (also known as a subdomain), (e.g. crm.example.com).

- **Embed Code**

  If you have specified an embed policy, the embed code for your content portal is displayed. The embed code is the external URL embedded in an iframe. Paste your embed code into other applications to embed your content portal within those applications.

- **Privacy Policy**

  Select a privacy policy to enforce for your content portal.

  - **Public**

    A portal can be set to be completely public to any consumer who has access to the URL or can be public to a select set of whitelisted IP addresses.

    The **Allow all IP addresses** option makes the content portal available to anyone. The **Restrict access based on the following IP rule policies** option allows an admin to restrict access based on the IP by which someone is accessing the content portal.

  - **Private**

    Setting the content portal's privacy policy to Private means that a user must be authenticated to access the content. IP Policy Restrictions do not apply when this option is selected.

- **External URL**

  The URL to the content portal is displayed. Share this URL externally to enable users to view the content within your content portal.

Example: You can embed Content Portals in Salesforce or Oracle Sales Cloud to enable your sales team to access your marketing approved content.

- **Define Collection View**

  Select a configuration of filters to define what content users see in the collection. See Defining collection views for more information and applied best practices for creating different portals.

5. Click **Save**.
6. Click **Preview** to see a preview of the content to be stored within your portal.

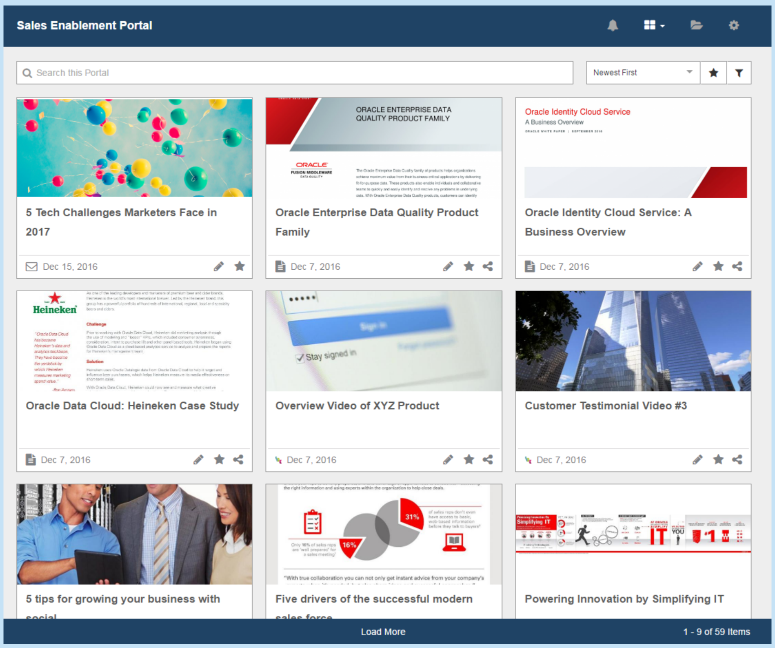
11.2 Defining collection views

After you have created your content portal, you can customize the content that is displayed within the portal by defining a collection view. Defining a collection view will filter the content that does not match the collection view specified. If a collection view is not defined, a content portal will display all content.

Example: You might want to create a content portal for a sales team in North America, filled with content that will help this team close sales. With this use case in mind, you might configure your collection view to display content with the following filter:

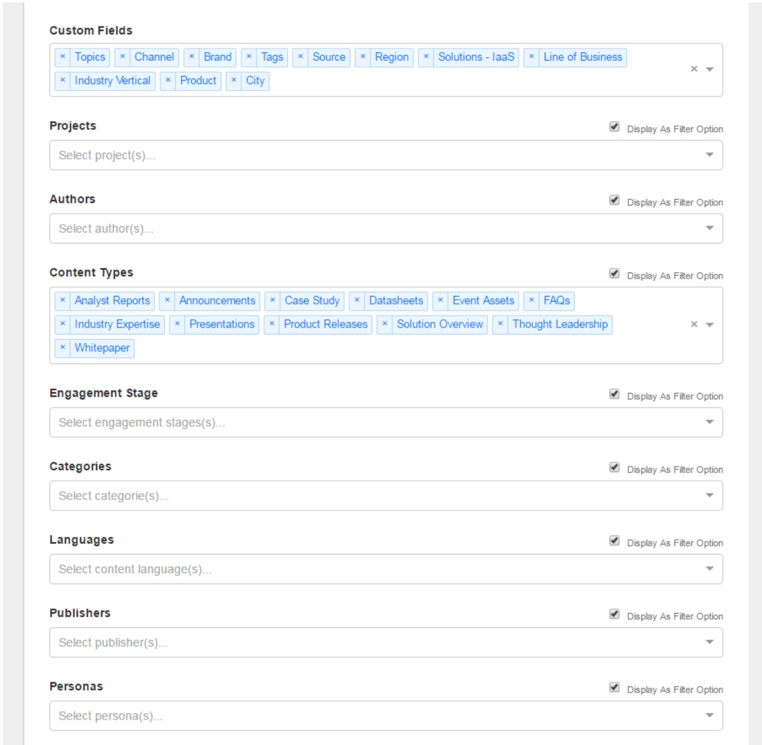
- Content Languages: English
- Engagement Stages: Purchase

This collection view will ensure that your content portal will only display content relevant to the sales team using the portal.



To define a collection view:

1. Navigate to **Distribution** > **Portal**.
2. Select the content portal for which you want to define a collection view.
3. Under *Define Collection View*, click the drop-downs to select the criteria for your collection view filter. Multiple criteria can be selected.



4. Administrators have the option to choose which attribute(s) (i.e. Projects, Content Types) should also be displayed as filter options to end users. By default, every option is enabled. Simply uncheck the **Display As Filter Option** checkbox to hide a given filter option.

5. (Optional) Click **Preview** to see what content will be displayed with the currently selected collection view.

6. Click **Save**.

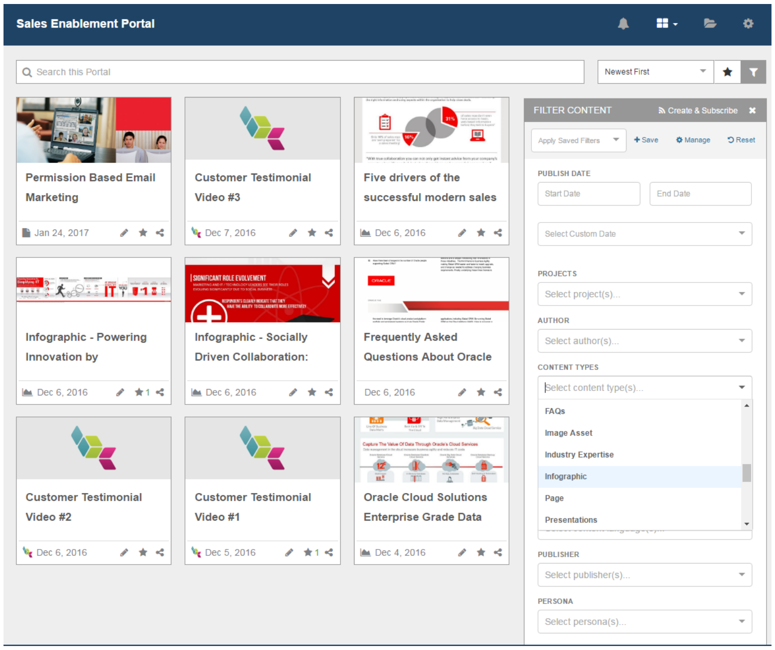
11.3 Creating a content portal filter

When viewing content portals, you can create a filter to view only the content assets you want to see.

To create a content portal filter:

1. Navigate to a content portal.
2. Click the filter icon.

3. Click the drop-downs to configure the filter.

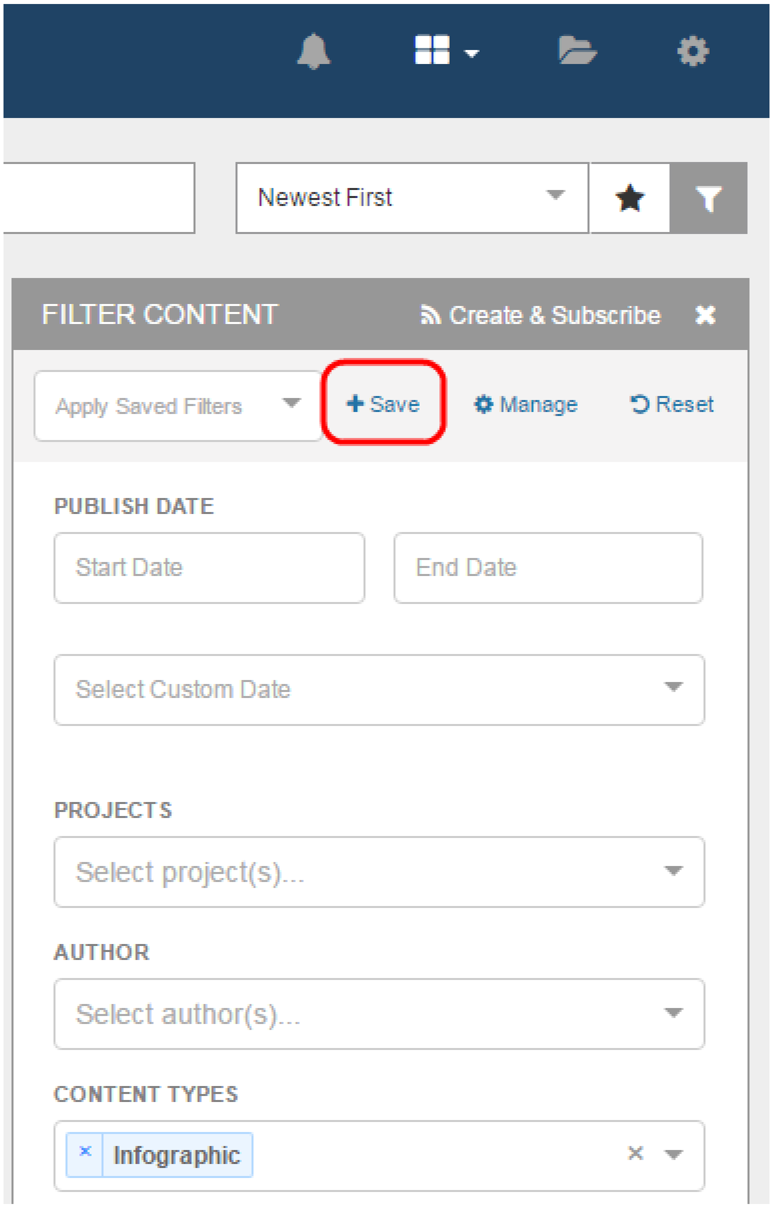


Note: The options displayed in the filter drop-down lists are configured in Content Marketing as part of the content planning and organization capabilities.

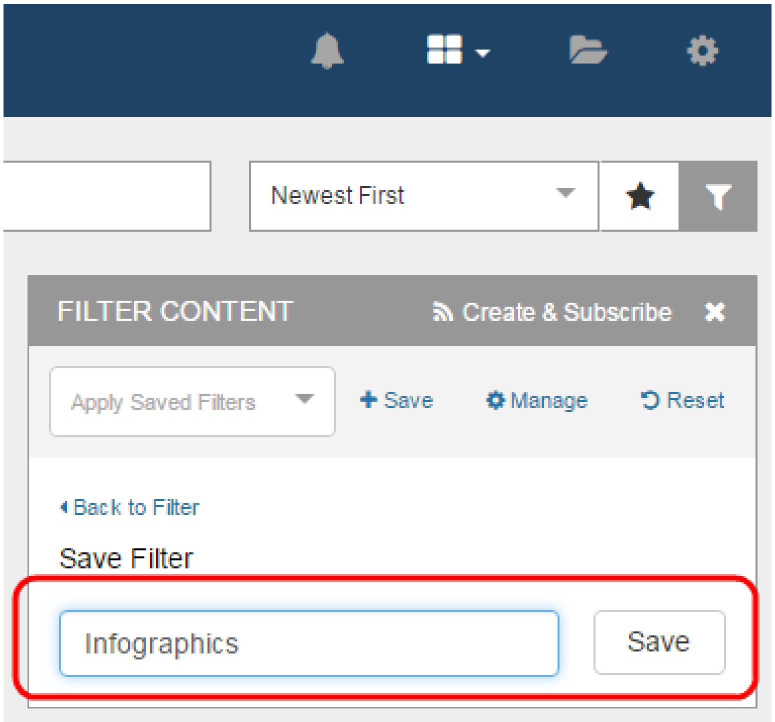
Content assets are filtered immediately, and the content portal will only display content assets matching the filter criteria. If you are an authenticated Content Marketing user, you can save the filter.

To save the filter:

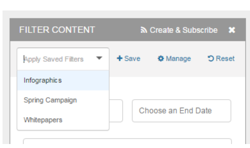
1. Click **Save**.



2. Enter a name for the filter and click **Save**.



Your filter is saved and is displayed in the filter list.



Now that the filter is saved, you might want to subscribe to the filter to receive notifications when new content is published to the portal and matches your filter.

11.4 Subscribing to a content portal filter

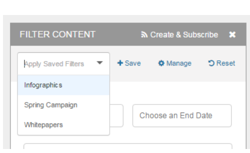
You can subscribe to saved content portal filters so that you are notified when new content that matches your filter is published.

We recommend that users create filters first, and then subscribe. Users can create a filter and subscribe to that filter at once, however doing so will automatically give the filter a system-generated name. Creating your filter first enables users to name the filter meaningfully before subscribing.

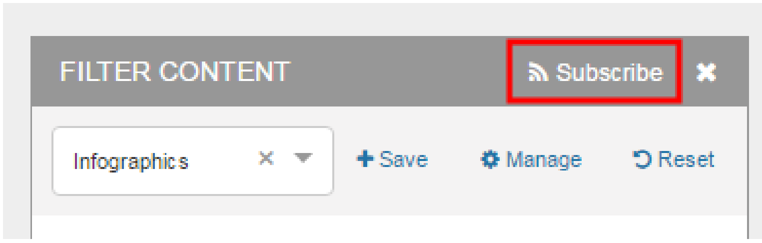
To subscribe to a content portal filter:

1. Navigate to a content portal.
2. Click the filter icon.

3. Click the drop down list to select a filter you've already created and saved.

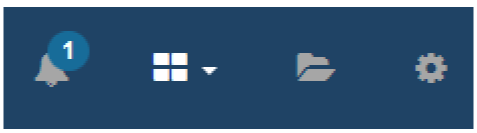


4. Click **Subscribe**.

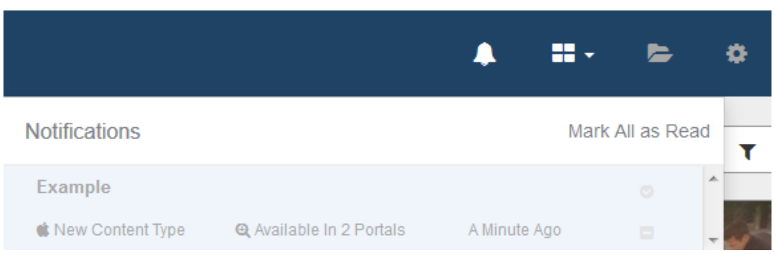


You are now subscribed to that filter for that specific content portal.

When new content is published that matches one of your filters, a notification will appear.



These Content Notifications contain information about the new content published, including the content's content type, content portal, and publish date.



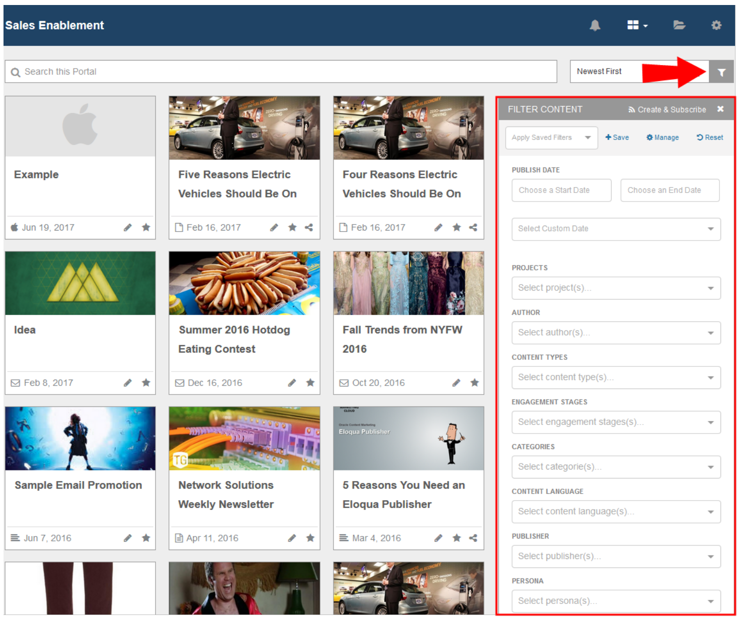
11.5 Working in content portals

When accessing a content portal without authenticating to the Oracle Content Marketing instance, users have a number of actions they can perform.

Learn more by watching the video

Using the Filter Options

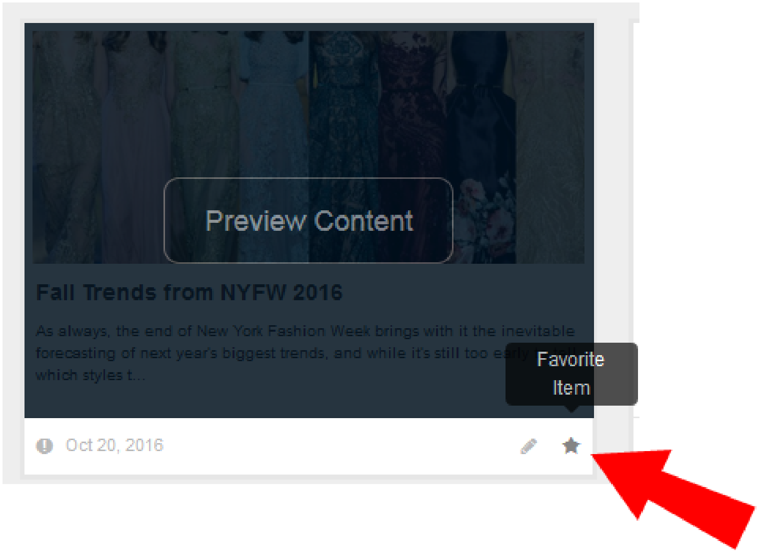
The filter options can be used to sort and find relevant content quickly. You can sort content by date published, or click on the funnel icon to expand the filter options and select the criteria your search will be based upon. For more information, see Creating a content portal filter.



Note: The options displayed in the filter drop-down lists are configured in Content Marketing as part of the content planning and organization capabilities.

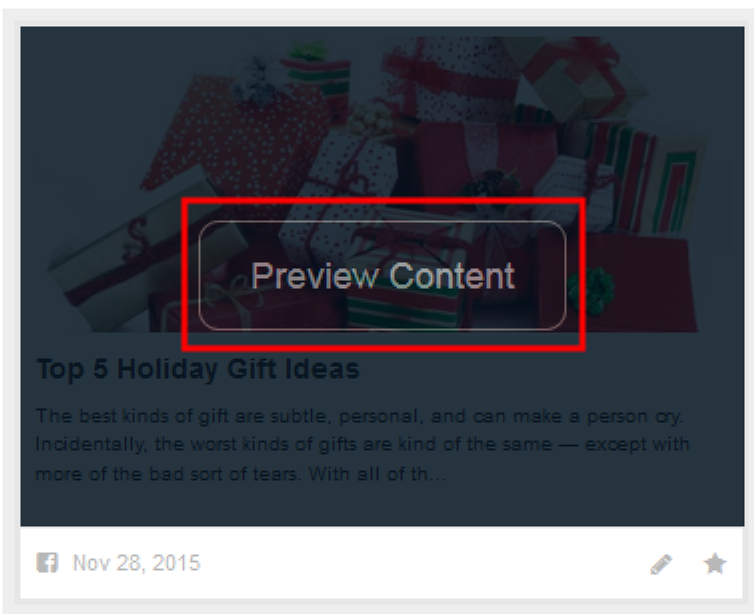
Adding Favorites

Using the star icon, you can add an asset as a favorite piece of content to build a personal collection of assets, helping sales to easily repurpose successful content.



Content Preview

When you hover over an asset, a "Preview Content" button will appear.



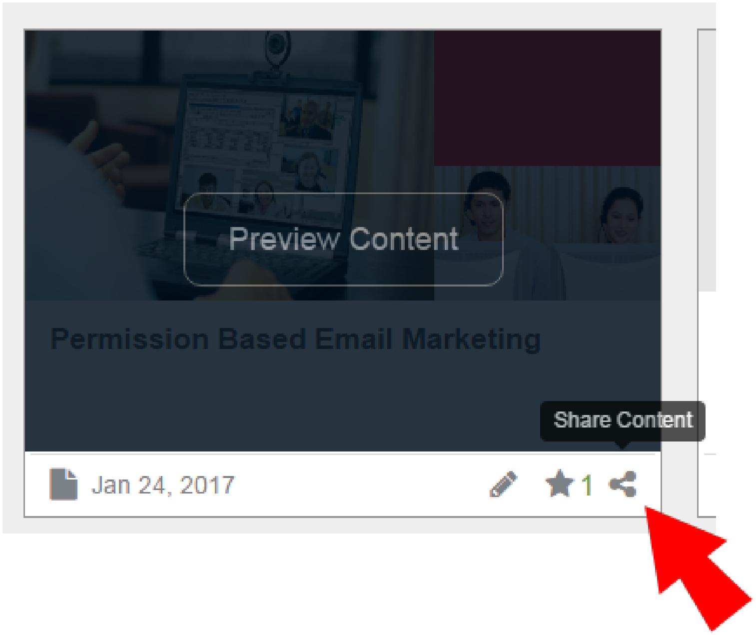
Click to display a preview of the content asset.

Preview Features

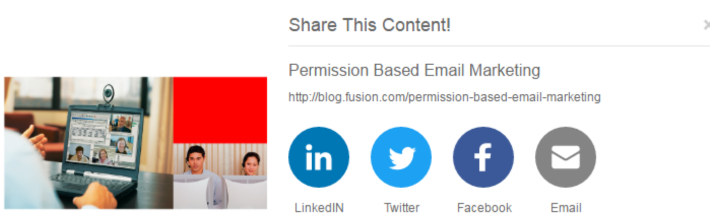
- **Previous / Next Page**: Moves to the corresponding document page in the preview.
- **Rotate left / right**: Rotates the preview 90 degrees.
- **Fit page to window**: Adjusts the zoom to fit the page length to the preview window.
- **Fit page to window width**: Adjusts the zoom to fit the page width to the preview window.
- **Zoom to actual size**: Adjusts the zoom to 100 %.

Sharing content

Click the **Share** icon to share content to LinkedIn, Twitter, Facebook, or email.



The published content's URL will be displayed along with the sharing options.



11.6 Integrating content portal into Salesforce.com

A Content Portal can be embedded within other applications using the **external URL** provided in the portal settings. To illustrate this in practice, this documentation will demonstrate how to embed a Content Portal within Salesforce.com. After you have created a content portal portal in Content Marketing, an External URL will be generated that can then be added as a Web Tab within Salesforce.com so that users can access marketing approved content directly from within Salesforce.com.

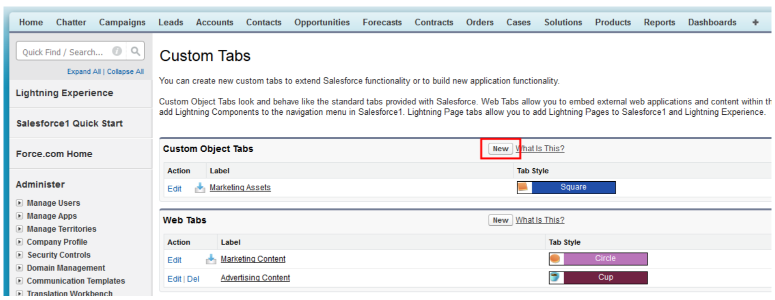
Tip: To customize your Web Tab beyond the instructions in this topic, refer to Creating Web Tabs in Salesforce's documentation.

To integrate content portal into Salesforce:

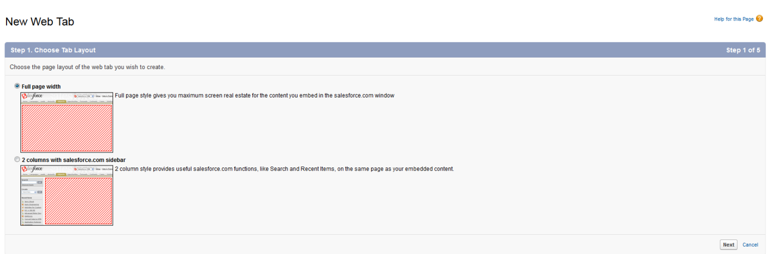
1. Login to Salesforce.com.

2. Under *Build*, navigate to **Create** > **Tabs**.

3. Under *Web Tabs*, click **New**.

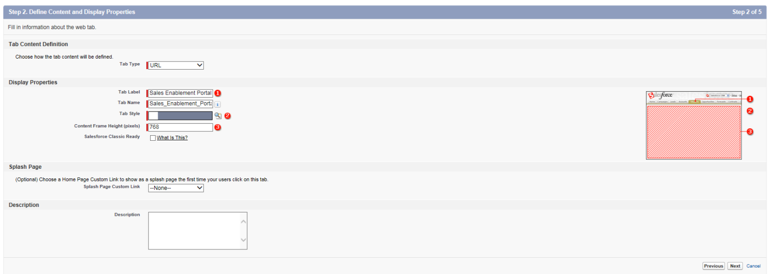


4. Select a layout for your tab and click **Next**. We recommend a *Full page width* layout, however content portals are responsive and can adjust to either layout.

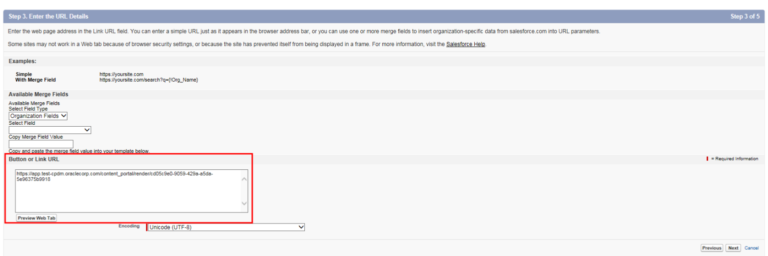


5. Select the content and display properties for your tab and click **Next**. At minimum, you must configure the following:

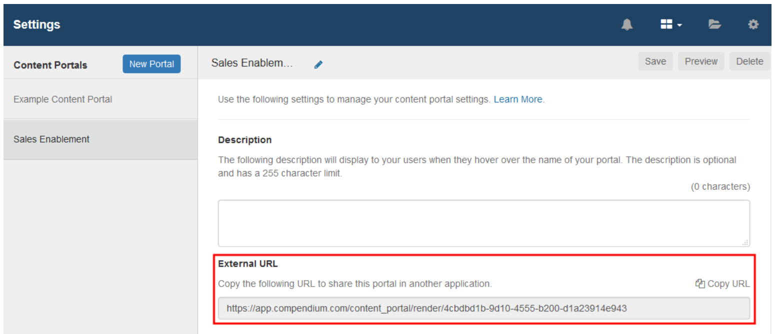
- **Tab Type**: Click the drop-down and select **URL**.
- **Tab Label:** Enter a label that will display on the tab within Salesforce.
- **Tab Style**: Click the drop-down and select a tab style.
- **Content Frame Height**: Change the default frame height from 600 to 760. We recommend this height because content portal was created for browser resolutions of 1366x768.



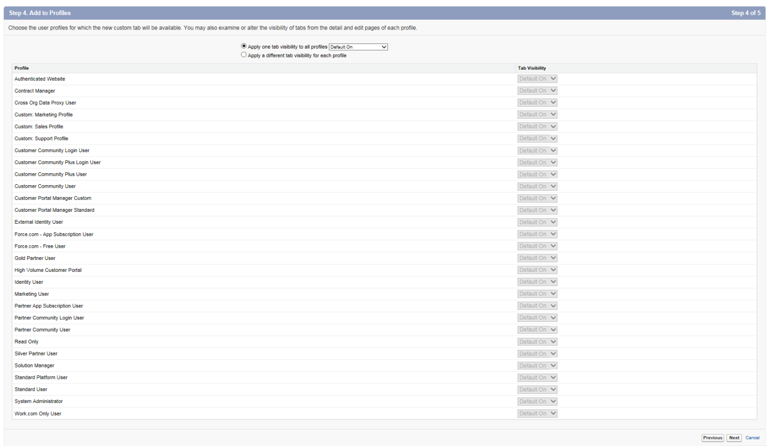
6. Paste the external URL for your content portal in the **Button or Link URL** textbox and click **Next**. Note that Content Portal does not have any features that necessitate the configuration of Field Merge options.



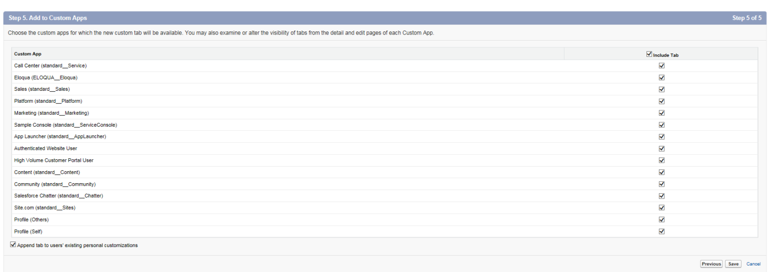
The external URL for your content portal can be found in the content portal settings page under **External URL**.



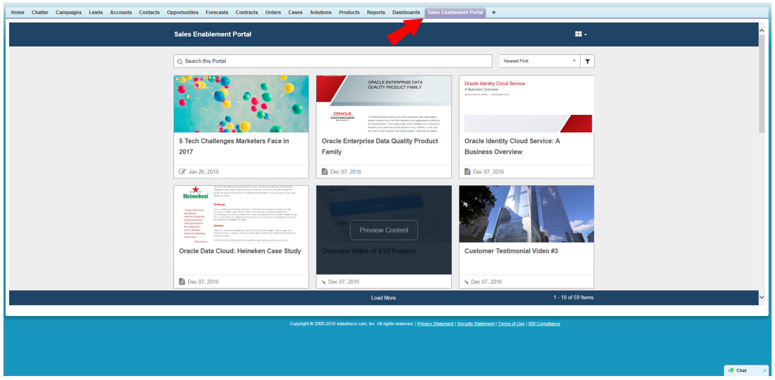
7. Select the user profiles for which the content portal will be available and click **Next**.



8. Select the custom apps for which the content portal will be available and click **Save**.



Your content portal will appear as a web tab in the top navigation for the profiles and apps that have been configured. Click the tab to access and start using your content portal.



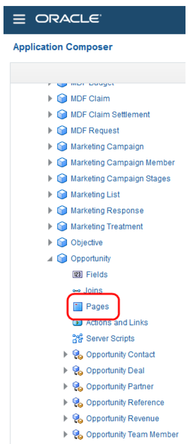
11.7 Integrating content portal into Oracle Sales Cloud

A Content Portal can be embedded within other applications using the **external URL** provided in the portal settings. To illustrate this in practice, this documentation will demonstrate how to embed a Content Portal within Oracle's Sales Cloud CRM. After you have created a content portal portal in Content Marketing, an External URL will be generated that can then be added to an External Web Content Subtab within a Simplified Page Web Tab within Sales Cloud so that users can access marketing approved content directly from within Sales Cloud.

Note: Summary instructions are included below to embed an external URL in Sales Cloud. To customize your External Web Content Subtab beyond the instructions in this topic, or to troubleshoot why your External Web Content Subtab may not be displaying your content portal, refer to Adding an External Web Content Subtab to a Simplified Page in Sales Cloud's documentation.

To integrate content portal into Sales Cloud:

1. Login to Oracle Sales Cloud in a sandbox environment.
2. Click **Navigator > More > Application Composer**.
3. Click the **Application** drop-down to select the Application you want to customize.
4. Expand **Standard Objects** or **Custom Objects**, depending on which type of object you want to customize.
5. Expand the object you want to embed the content portal within, and click **Pages**.

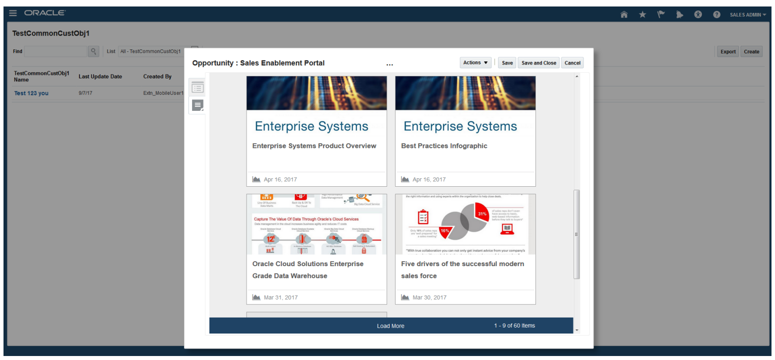


6. Ensure you are in the **Simplified Pages** tab.
7. Under **Details Page Layouts** click **Default custom layout**.
8. Under **Subtabs Region**, click the **Add** icon.
9. Select **Web content** and click **Next**.
10. Enter a name for the subtab in the **Display Label** box.
11. Paste the external URL for your content portal in the text box at the bottom of the page. Note: An external URL must be enclosed within double quotation marks.

Example: "https://app.compendium.com/content_portal/render/448629aa-fe75-47f5-a273-4ba3766b312c".

12. Click **Save and Close**.

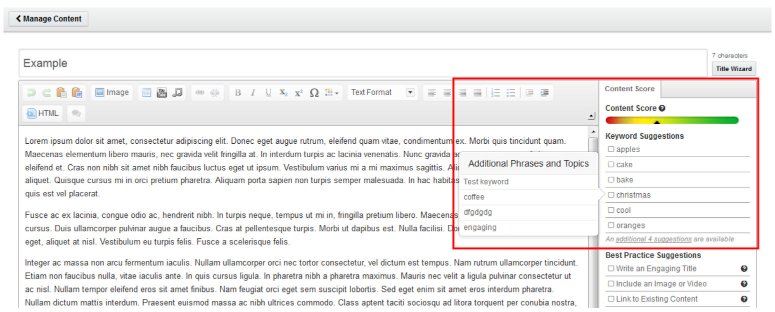
Your content portal will appear in the selected Application and Object as an External Web Content Subtab. Click the tab to access and start using your content portal.



12 Keyword Suggestions

A Keyword Suggestion is a feature that recommends keywords to content authors during authoring.

An important consideration in guiding the creation of content is integrating search phrases used by a target audience into your marketing content. These keyword suggestions are often used to instruct authors on SEO-friendly terminology or your preferred brand messaging. Keyword suggestions can be found within the Content Score panel within the content authoring screen.



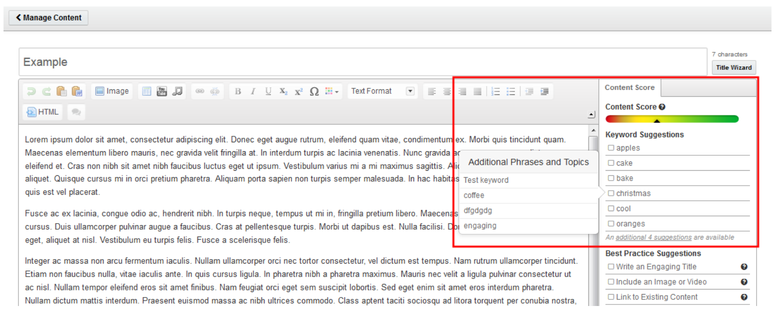
By including Keyword Suggestions in each post, you are:

- Keeping the content focused and on topic
- Maximizing the opportunity for the content to get distributed to category pages
- Playing a role fueling the category pages with the content necessary for search engine optimization (SEO) and search engine visitor traffic

Learn more: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

12.1 Adding keyword suggestions

An important consideration in guiding the creation of content is integrating search phrases used by a target audience into your marketing content. These keyword suggestions are often used to instruct authors on SEO-friendly terminology or your preferred brand messaging. Keyword suggestions can be found within the Content Score panel within the content authoring screen.



To add keyword suggestions:

1. Navigate to **Settings** > **Keyword Suggestions**.
2. If you have access to multiple business units, click the drop-down list and select the applicable Business Unit.
3. Click **New Keyword Suggestion**.
4. Complete the fields as appropriate.
   - **Keyword**: Enter the keyword suggestion.
   - **Assigned Users**: Click to assign the keyword suggestion to specific users.
   - **Topics**: Click to select topics the keyword suggestion will apply to.

- **Language**: Click to select the languages the keyword suggestion will apply to.

5. Click **Save**.

The keyword suggestion was added.

13 Ideas and Topic Planning

Ideas and Topic Planning is the brainstorming center for marketing teams to capture and plan ideas for future pieces of content. It is common for marketing teams to work cross functionally, and with agencies, to brainstorm creative for a marketing campaign. Ideas and Topic Planning helps marketing teams organize ideas for content around a marketing theme, source ideas using integrations with third parties, and build a list of ideas that can be fulfilled at any time by a distributed creative team. You can suggest content to authors by creating topic suggestions, adding ideas, and planning a structure for the content.

Learn more: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

13.1 Planning topics

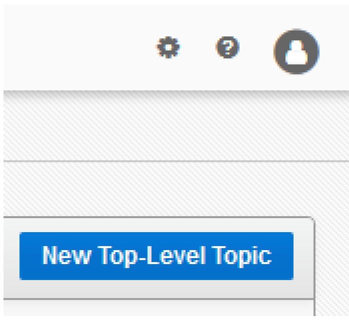
Topic plans can provide authors with an overview of the concepts you are assigning to them, and it is a good way to connect different topics and get an idea of the topic's scope.

You can suggest topics to help focus the efforts of your authors. Topics appear on the right side of the author interface and can be modified at any time. Topics are commonly selected based on the following criteria:

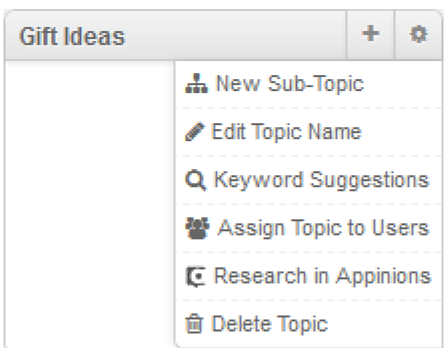
- Association with a major marketing initiative (ex. a product release).
- Association with important news or industry trends.
- Little to no content on the category blog.

To create a new topic:

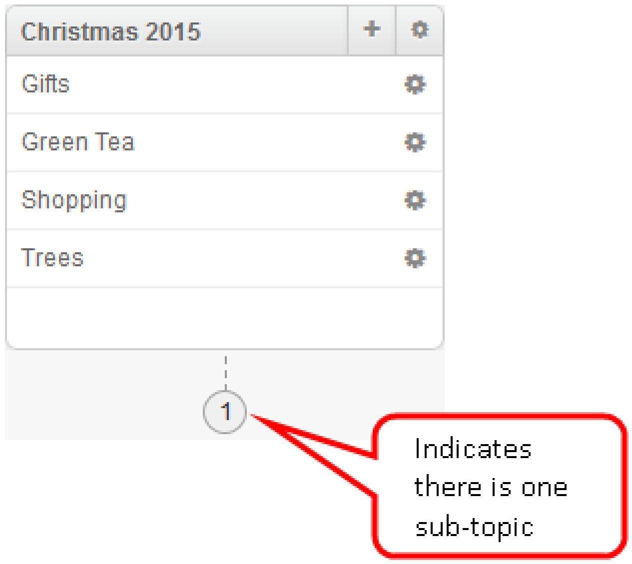
1. Navigate to **Planning** > **Ideas & Topic Planning**.
2. Click **New Top-Level Topic** in the upper right-hand corner, a new topic box appears. Type a name, then press **Enter** to save the new topic.



3. After you create the top-level topic, the following options are available through the gear icon to the right of the topic name:



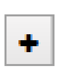
- **New Sub-Topic**: Creates a new sub-topic directly below the original topic. The circle below each topic indicates how many additional sub-topics are linked.



- **Edit Topic Name**: Updates the name as needed.
- **Keyword Suggestions**: Add any Keyword Suggestions and click **Save**.
- **Assign Topic to Users**: Select and assign authors to the category as needed, and click **Close**.
- **Research in Appinions**: Navigates to Appinions to research the topic.

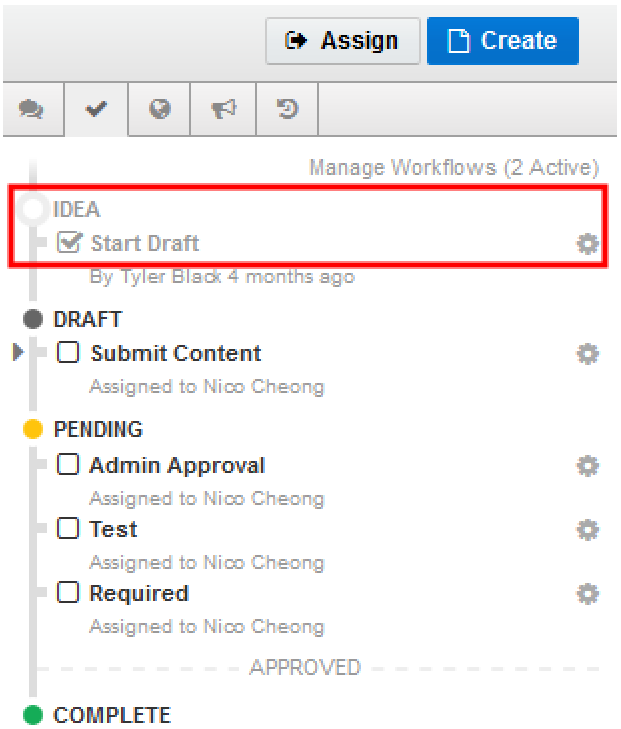
> **Note**: To enable this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request.

- **Delete Topic**: Deletes the topic.

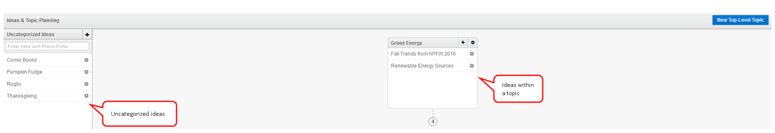
4. Click  to add ideas to the topic. Learn more about Ideas.

13.2 Creating new topic ideas

Creating an idea is the first step in the content creation process and is an excellent first step to adopting a culture of curation within a marketing team. When ideas are created, the related workflow task is called *Start Idea*. *Start Idea* is started when an idea is created, but has not yet been assigned a content type.



In the *Ideas and Topic Planning* page, Ideas for content can be organized within a broader topic. You can also have a list of ideas that may not fit within a topic yet, these ideas would reside in the *Uncategorized Ideas* section in the left-side pane.

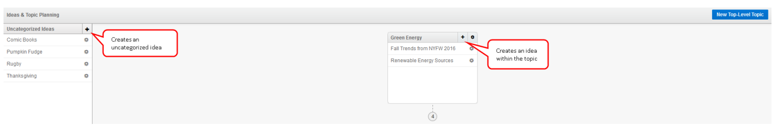


To create a new idea:

1. Navigate to **Planning** > **Ideas & Topic Planning**.

> **Tip**: Ideas can also be created from the content repository by creating content without a content type.

2. Click the icon in the *Uncategorized Ideas* list if you want to add a general idea, or to add the idea to a specific topic, click the icon on the corresponding topic box.



> **Tip**: You can move an uncategorized idea to a specific topic by dragging-and-dropping the idea to the topic.

3. Enter your idea into the text box and press **Enter**, the idea is saved.
4. To assign an idea to a specific author:
   i. Click the gear icon next to the idea, the *Edit Idea* window opens.
   ii. Click **Assign this Idea**, then select an author from the drop-down list.
   iii. Configure the other options as needed, then click **Save**. The idea is assigned to the author.

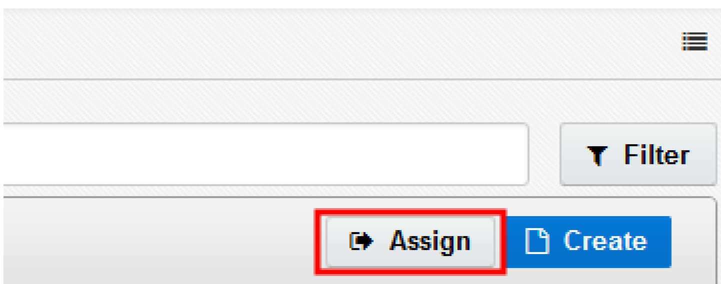
   > **Note**: The name of the idea will become the 'Content Title'; this can be updated when editing the asset.

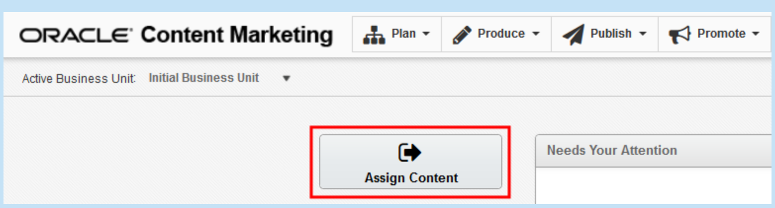
13.3 Assigning content to authors

You can assign a new content idea to an author, instructing them to begin the content creation process.

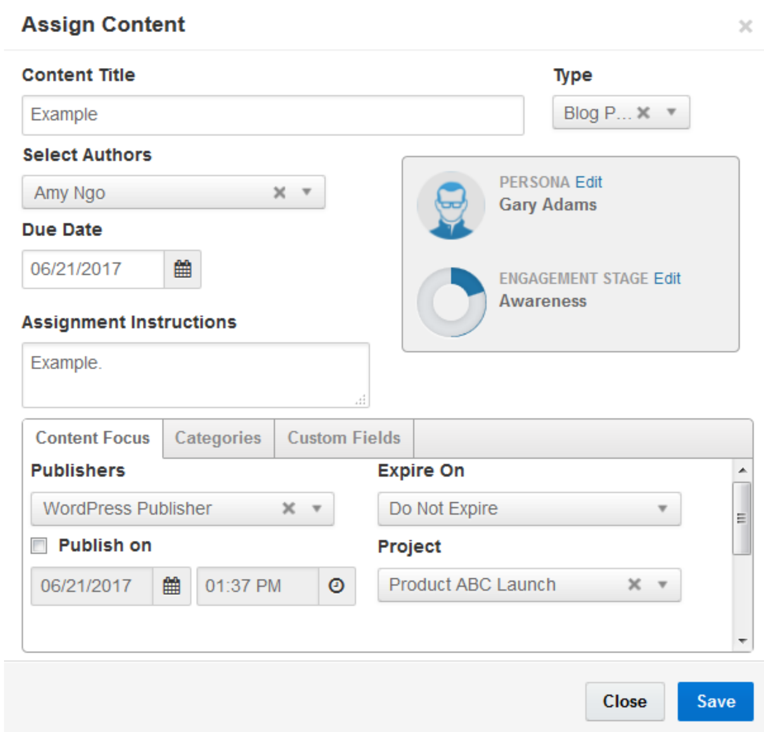
To assign a new content idea to an author:

1. Navigate to **Collaboration** > **Library** > **Assign**.



> **Tip**: You can also click **Assign Content** in the upper left-hand corner of the dashboard, typically seen immediately after you log in.
>
> 
>

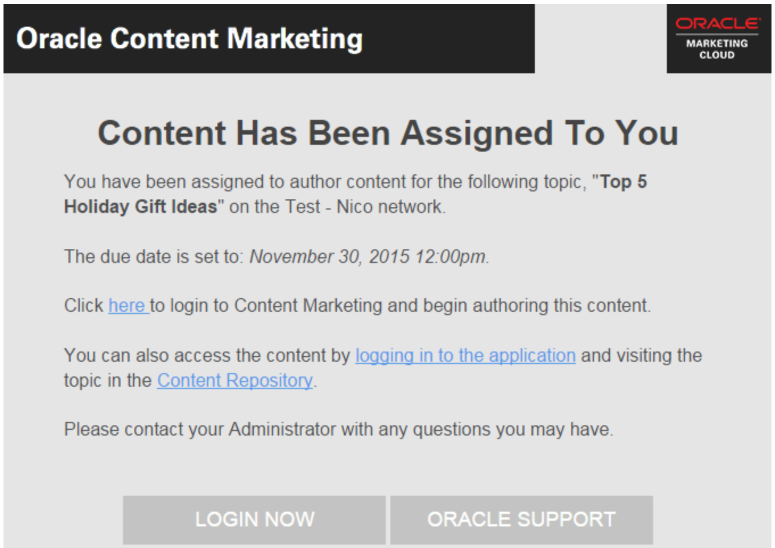
2. Complete the content assignment details:



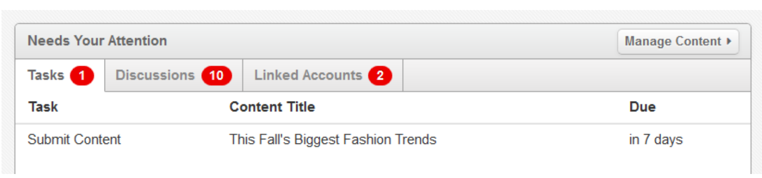
- **Content Title**: Enter a title for your content asset. The title should provide a brief description of the content, it will appear as a heading to the asset once it's published, it will also be a part of the asset's URL. The maximum character length for a content asset title is 255 characters.
- **Type**: Select one of the content types that have been defined in your license. If you need to create more content types, see Creating content types for more information.
- **Author**: Select an author to assign to create the content asset.
- **Due Date**: Select a date for the content asset to be completed by.
- **Persona**: Select a target persona to be associated with the content asset.
- **Engagement Stage**: Select an engagement stage to be associated with the content asset.
- **Assignment Instructions**: Enter any applicable content assignment instructions.
- **Content Focus**: Select a publish date and project for the content asset.
- **Categories**: Select categories to associate the content asset with.
- **Custom Fields**: Fill in data for any of the custom fields tied to the selected asset.

3. Click **Save**.

When a content assignment is created and assigned to an author, the author will be sent an email notification. and will see a notification on the dashboard in the *Needs Your Attention* section.



The author will see a notification on the dashboard in the *Needs Your Attention* section. Authors can then click on the task, or follow the link sent automatically to them in the trigger email, to view and complete an assignment.



Note: You can search for assigned content by going to the *Manage Content* page (Navigate to **Produce** > **Manage Content**), then filter the results by *Stage*. See Filtering the content repository for more information.

14 Integrate

You can integrate your external accounts with Oracle Content Marketing, this allows you to share information and interact with content in another application. Oracle Content Marketing integrates with the following applications:

Wordpress

Drupal

Oracle Eloqua

Oracle Responsys

Oracle SRM

Developers

View Apps for a list of other software solutions that integrate with Content Marketing.

14.1 Oracle Eloqua Integrations

Oracle Eloqua enables marketers to plan and execute automated marketing campaigns while delivering a personalized customer experience for their prospects. These campaigns scale for audiences across all channels including email, display search, video advertising, and mobile. With integrated lead management and easy campaign creation, the solution helps marketers engage the right audience at the right time in their buyers journey.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Use Oracle Content Marketing with Oracle Eloqua to leverage the following features:

- Oracle Marketing Calendar App

  The Oracle Marketing Calendar displays all of your upcoming Eloqua campaigns (including drafts) and emails through a calendar view. While in Eloqua, the Oracle Marketing Calendar app opens in a separate browser tab. The calendar can be accessed by all users of your Eloqua instance and respects your security settings and permissions to only show campaigns and emails that users have access to view.

- Dynamic Content App

  The Dynamic Content app enables marketers to access content from Oracle Content Marketing and insert that content into emails and landing pages. Optionally, the marketer can choose to personalize the content by a persona that has been mapped to an Eloqua segment.

- Promoting a single content asset

  The out-of-the-box integration with Eloqua allows marketers to promote content from Content Marketing to Eloqua to store and use content assets to build campaigns.

- Promoting multiple assets as a content group

  Content Groups allow you to easily create groups of content that can be pushed into email campaigns, marketing automation platforms, or landing pages. The process of using content groups is as easy as selecting the content you would like to use, formatting the content to your liking, and pushing it to where you would like it to go (or you can download the html to be able to use it anywhere).

- Publishing content to Eloqua

  The Eloqua publisher allows marketers to automatically push content to Eloqua once it has been approved through workflow. The Eloqua publisher pushes the full, unmodified body of a content asset into the *Shared Content* folder within Eloqua. This functionality is currently under controlled availability.

Note: Content Marketing's Eloqua integrations use the Eloqua API to read the Eloqua user's rights and security group permissions. All security permissions Eloqua users are entitled to will be respected during Content Marketing to Eloqua integrations.

Learn more: For more information, sign up for the Eloqua Integration QuickCast, or the Pushing Content to Eloqua course offered by the Oracle Marketing Cloud Academy.

14.1.1 Integrating with Oracle Eloqua

Linking your Content Marketing profile with your Eloqua account allows you to share and reuse content on both platforms.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

To integrate with Eloqua:

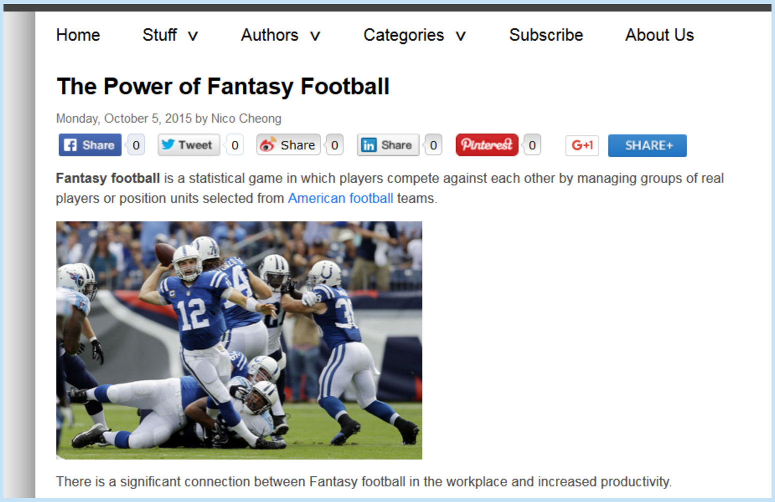
1. Login to Oracle Content Marketing (app.compendium.com).
2. Navigate to **Distribution** > **Social & Linked Accounts**, the *Linked Accounts* page opens.
3. Click **Add Account**, a window opens requesting permission to access Eloqua on your behalf.
4. Click **Login**, then enter your Eloqua credentials and click **Sign In**.
5. Confirm that the account information is correct then click **Accept**, the integration window closes and Eloqua is listed as a linked account in your Content Marketing profile.

14.1.2 Promoting a single content asset to Eloqua

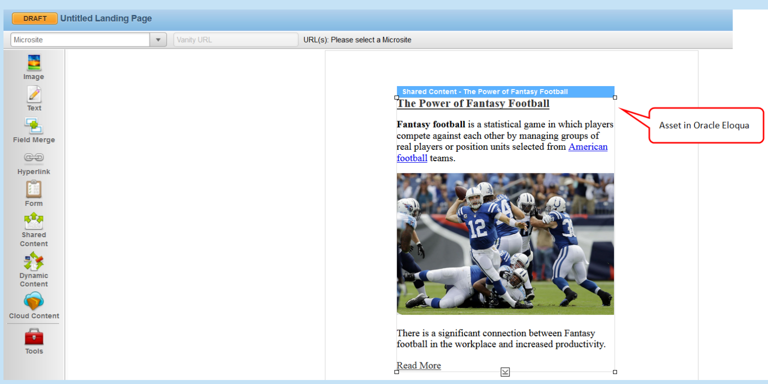
After linking your Eloqua account, you can begin promoting content to Eloqua so that it can be stored, and used to build campaigns.

When an asset is promoted to Eloqua, the content asset is promoted to Eloqua as Shared Content and can be used to build assets in Eloqua campaigns as needed. Promoting an asset will not include the entire, raw constructed HTML for a full email or landing page. However, the promoted content will include the content asset title, the asset body text, and a *Read More* link that directs users to the location where the asset was published.

Example: When content assets are published to a blog, the asset body in it's entirety is displayed.



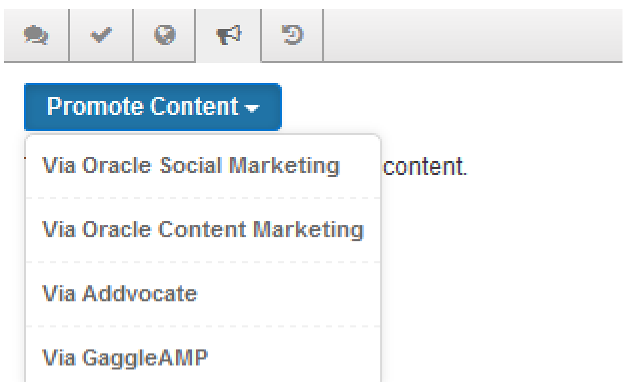
After promoting the same content asset to Eloqua and inserting it into an Eloqua landing page, the asset displays as follows:



Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

To promote content to Eloqua:

1. Login to Oracle Content Marketing (app.compendium.com).
2. Navigate to **Collaboration** > **Library**, the content management page opens.
3. Select the content that you would like to push to Eloqua, then select the *Promote* tab on the right-side pane.
4. Click the **Promote Content** drop-down list, then select **Via Oracle Content Marketing**.

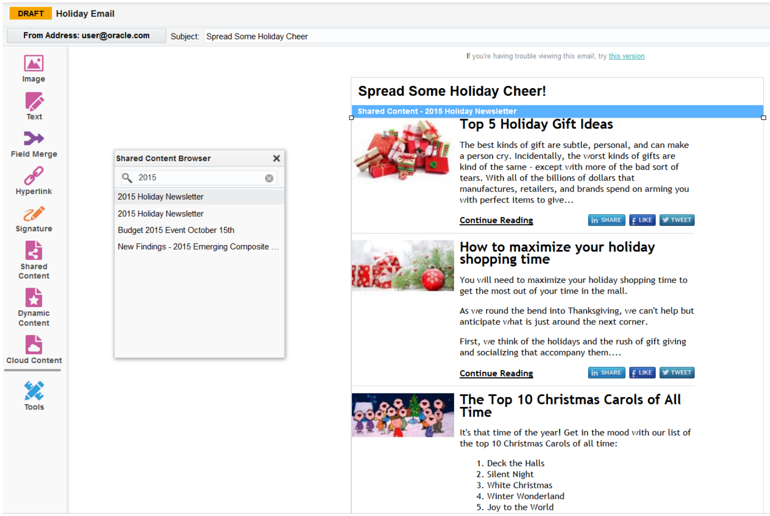


5. Select the check box next to the Eloqua account to which you want to push the content, then click **Promote**. The content is promoted to Eloqua. Learn more about accessing the content in Eloqua.

Note: The promotion message is not sent to Eloqua; only the actual post content.

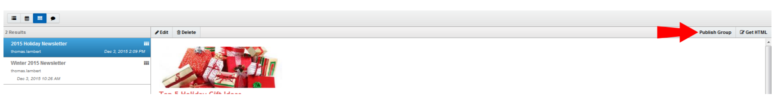
14.1.3 Promoting multiple assets as a content group

You can promote content groups to Eloqua to use Content Marketing content groups in your Eloqua email campaigns and landing pages. See Content Groups to learn more about these capabilities.

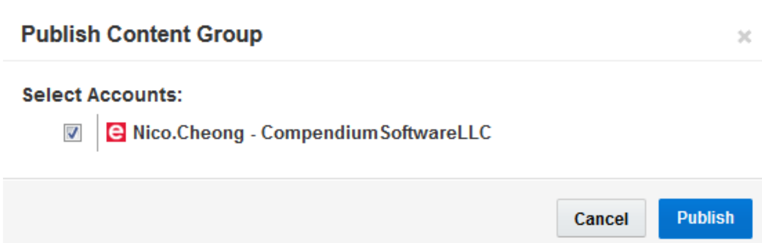


To promote content groups to Eloqua:

1. Navigate to **Collaboration** > **Groups**.
2. Select the content group you want to promote.
3. Click **Publish Group**.



4. Select an Eloqua linked account to promote the content group and click **Publish**.



The content group is promoted to Eloqua. In Eloqua, the content group will appear in your Shared Content folder, waiting to be used for any of your marketing communications.

See Editing Content Marketing assets in Eloqua for more information.

14.1.4 Publishing content to Eloqua

An Eloqua publisher allows marketers to automatically push content to Eloqua once it has been approved through workflow. This functionality differs from the Eloqua promotion integration which creates a packaged up promotion to a piece of content published on a content hub. The Eloqua publisher pushes the full, unmodified body of a content asset into the *Shared Content* folder within Eloqua.

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

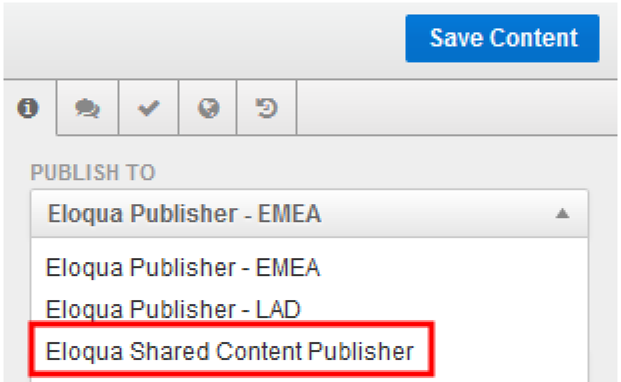
Learn more by watching the video

Prerequisites

- An active Eloqua publisher

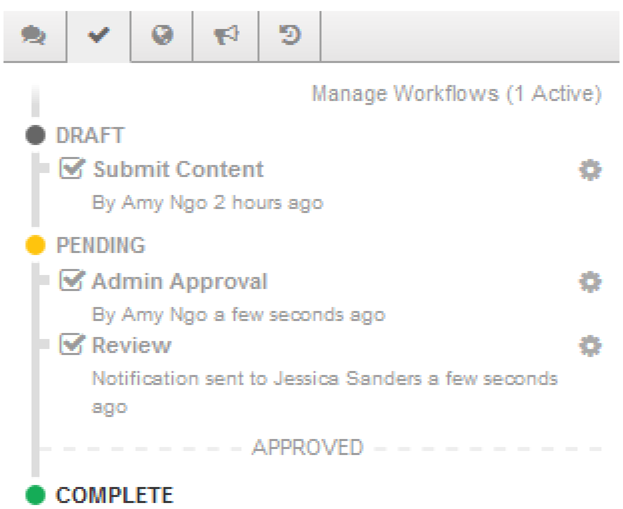
To publish content to Eloqua:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset to be published and click **Edit**.
3. In the *Content Settings* tab, click the *Publish To* drop-down menu and select the Eloqua publisher.

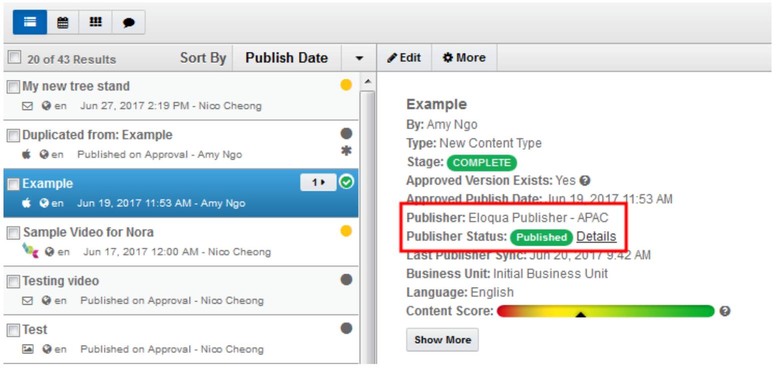


Note: If your license is configured for multiple Business Units, you may need to enable the Eloqua publisher for this specific Business Unit for the publisher to appear. See Changing the default publisher for more information.

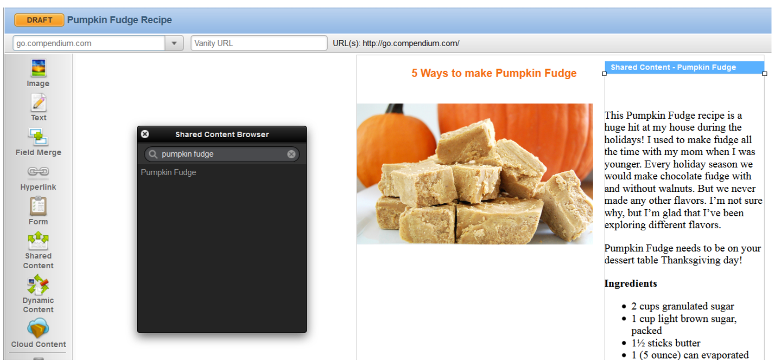
4. In the *Content Asset Workflow* tab, move the asset through workflow.



5. Review the asset's publish status in the content repository. After the Publisher Status has been updated to **Published** you can review the asset in Eloqua.



In Eloqua, the content asset will appear in your Shared Content folder, waiting to be used for any of your marketing communications.



See Editing Content Marketing assets in Eloqua for more information.

Note: In the event the server is temporarily unavailable, the publisher will automatically attempt to re-sync the asset up to 12 times over a span of 8 hours. After 8 hours, the sync will fail and the asset will need to be manually republished. The retry schedule follows:

Retry Schedule	Publisher Action
30 seconds	Retry
1 minute	Retry
5 minutes	Retry

Retry Schedule	Publisher Action
30 minutes	Retry
30 minutes	Retry
30 minutes	Retry
1 hour	Retry
1 hour	Retry
1 hour	Retry
8 hours	Retry

14.1.5 Editing Content Marketing assets in Eloqua

After you push your Compendium content to Eloqua, you can access it in the Component Library. From here you can edit the content as needed before using it in your campaigns.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

To edit a Content Marketing asset in Eloqua:

1. Login to Eloqua, then navigate to **Assets** > **Component Library**.
2. Click **Shared Content** on the left-side menu, then open the *Compendium* folder.
3. Double-click to open the content that you would like to edit.

> **Note**: The content name is the title of the post.

4. Edit the content as needed, then click **Save** to save your changes.

14.2 Integrating with Oracle Social Relationship Management

The Oracle Social Relationship Management (SRM) platform is a web-based application that helps brands and marketers create and publish content to their social properties, and monitor, manage, and analyze the engagement with that content.

Use Oracle Content Marketing with Oracle SRM to promote your published content assets through social media channels while using best-in-class social relationship management components to measure the effectiveness of your content.

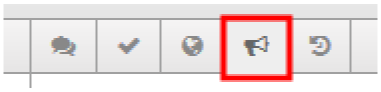
Promoting assets to Oracle SRM is an Out of the Box integration with Content Marketing, the only configuration requirement to enable the integration is to login to Oracle SRM with the appropriate credentials.

14.2.1 Promoting content via Oracle Social Relationship Management

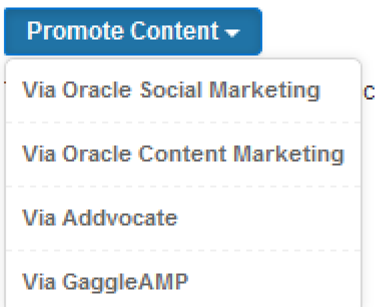
Promoting is the process Content Marketing uses to transfer content asset data to another application or platform. Promote published content assets through social channels managed in Oracle Social Relationship Management (SRM). Oracle SRM can publish to multiple social streams, see the Oracle SRM Help Center for more information.

To configure the SRM integration:

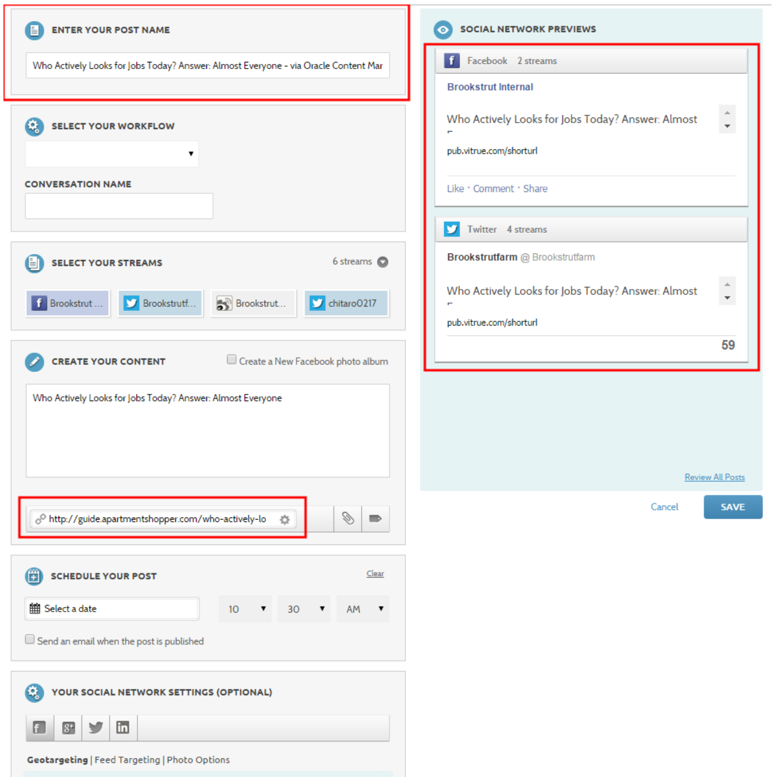
1. Navigate to **Collaboration** > **Library**.
2. Select a content asset to promote to Oracle SRM.
3. Click the **Promote** tab.



4. Click the **Promote Content** drop down menu and select **Via Oracle Social Marketing**.



5. You will be prompted with a login screen for Oracle SRM. Enter your credentials and click **Login**.
6. Social post fields will be populated with data from the content asset. The content asset title will be entered in Oracle SRM as the post name, your active social streams will be selected for the post, and a URL for the published asset will be inserted into the social post.



7. Modify the remaining fields as required and click **Save**.

Note: This integration does not export any media such as images or video from a content asset.

Your content promotion is now configured in Oracle SRM. For more information on the lifecycle of a post in SRM from create to publish, view Creating a Post in the Oracle SRM Help Center.

14.3 Integrating with Oracle Responsys

Users have the capability to promote content authored in Oracle Content Marketing over to Responsys to include in B2C Cross-Channel Marketing campaigns.

> **Note**: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

A user must have the following rights enabled in order to take advantage of this feature:

- **Oracle Content Marketing**: Users must have rights to manage content as well as the right to promote content.
- **Responsys** : User must have the ability to access Web Services enabled within Restrictions.

To integrate with Responsys:

1. Login to Oracle Content Marketing (app.compendium.com).
2. Navigate to **Distribution** > **Social & Linked Accounts**, the *Linked Accounts* page opens.
3. Click **Add Account**, a window labeled *Responsys Integration Setup* opens.
4. Enter the API Username and Password for your Responsys account, then click **Submit**. When the integration is complete the account appears in your list of Linked Accounts, you can then promote content to Responsys as needed.

Learn more: For more information, sign up for the Oracle Content Marketing: Responsys Integration course from the Oracle Marketing Cloud Academy.

14.3.1 Promoting content to Responsys

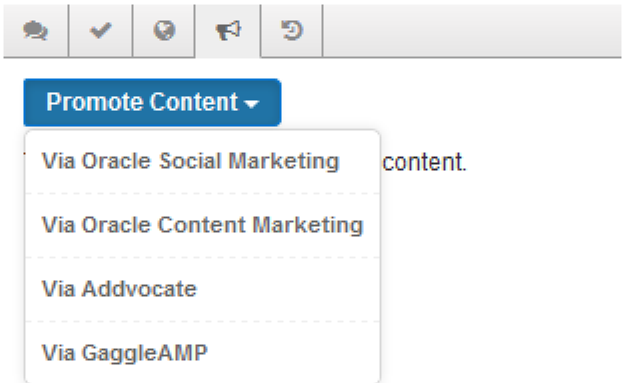
With a linked Responsys account, the user can start promoting content to Responsys.

Promoting an asset will not include the entire, raw constructed HTML. However, the promoted content will include the content asset title, an abstract of the asset body text, and a *Read More* link that directs users to the location where the asset was published.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

To promote content to Responsys:

1. Login to Oracle Content Marketing (app.compendium.com).
2. Navigate to **Collaboration** > **Library**.
3. Select the content asset you would like to push to Responsys in the list of content on the left.
4. Click on the *Promote* tab on the right-side pane.
5. Click the **Promote Content** drop-down list, then select **Via Oracle Content Marketing**, the Content Promotion window opens.



6. Select the check box next to the Responsys account to which you want to push the content, then click **Promote**. An asset that has been successfully promoted to Responsys will display "Successful" with the promotion date within the Promote tab. The content can now be accessed in Responsys.

> **Note**: A message will not be included with the content asset when pushed to Responsys. It is not necessary to include data in this field. When a user clicks Promote, content is pushed immediately over to Responsys. The "Publish on:" selection box will not wait to the selected time to promote a content asset to Responsys. It is not necessary to select a date when promoting to Responsys.

14.3.2 Viewing content assets in Responsys

After content has been pushed from Oracle Content Marketing, it can be accessed in Responsys.

Note: Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

To view assets in Responsys:

1. Login to Responsys.
2. Navigate to **Content** > **Manage Content**.
3. Navigate to **Select All Content** > **OCM Content**.
4. Click on the name of your asset to see a document preview, and to edit your asset further as necessary.

14.4 Wordpress Integration

Marketers can publish their content to their Wordpress.org installation using the out of the box integration within Oracle Content Marketing (OCM).

Note: The Content Marketing publisher integration with Wordpress does not work with Wordpress**.com** hosted websites. The Content Marketing integration only works with self -hosted installs of the Wordpress software available from Wordpress**.org**.

Authors & Users

Oracle Content Marketing makes it easy to keep authors in sync with your Wordpress install. Authors in Oracle Content Marketing are tied to users in Wordpress by the email address used with their account. Assets will be assigned and published for users in Wordpress where the author's email matches the user's email, and the user has the ability to publish. In most cases, content cannot be published for users set to a subscriber role in Wordpress; by default the subscriber role has no right to publish.

Authors without a user account in Wordpress will automatically have an account created for them in Wordpress the first time an asset is synced. Assets without an assigned author will be assigned to the user that was used to setup the Wordpress publisher.

Analytics

To track performance on content assets published to Wordpress using Oracle Content Marketing's Analytics, the OCM analytics script needs to be embedded in the template for all published assets.

The OCM Analytics script can be found at http://app.compendium.com/js/stats_bundle.js. For more information about the tracking script, see Tracking scripts FAQs.

Workflow

Oracle Content Marketing will set the status of the asset within Wordpress to draft, pending, or publish based on the current stage of the asset's workflow.

Oracle Content Marketing Workflow	Wordpress Status
Draft Stage	Draft
Asset has active tasks before approval	Pending
Asset Approved	Publish

Learn more: For more information, sign up for the Oracle Content Marketing: Wordpress Integration course from the Oracle Marketing Cloud Academy.

14.4.1 Configuring Wordpress integration

Setting up Wordpress integration involves:

- Installing the XML-RPC Modernization plugin to your Wordpress installation.
- Adding your Wordpress site as a publisher in Oracle Content Marketing.

After these steps are completed and you have verified your configuration by clicking **Test Login & XML-RPC URL** in the Wordpress publisher page, you have configured the Wordpress integration successfully.

Note: This integration is available upon request. Please contact your Account Manager for additional information on how to enable this integration on your network.

To integrate with Wordpress:

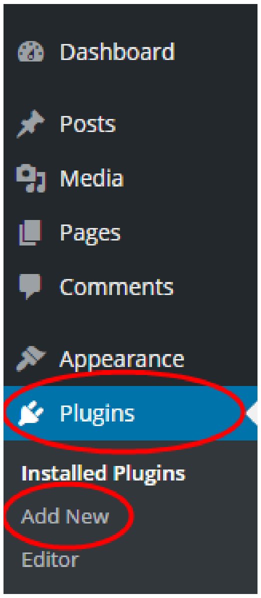
1. Install the XML-RPC Modernization plugin. This plugin extends Wordpress XML-RPC capabilities to include additional user management methods to create, delete and edit users within Wordpress. For more information on installing plugins, see Managing Plugins.

   Prerequisite

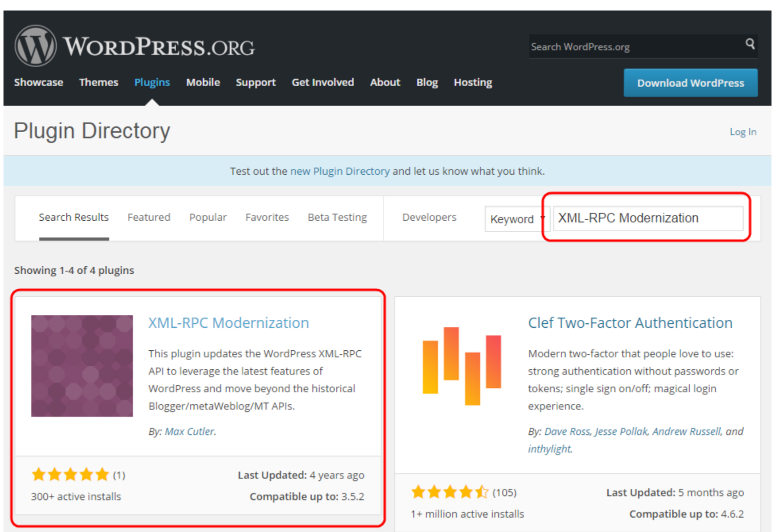
- The Administrator or Super Administrator right is required to install plugins.

To install the XML-RPC Modernization plugin automatically:

1. In your Wordpress site click **Plugins** > **Add New**.



2. Search for "XML-RPC Modernization". The XML-RPC Modernization plugin is displayed.

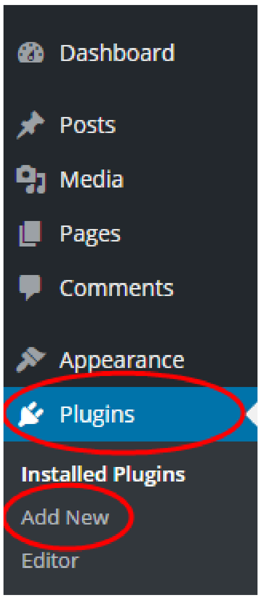


3. Click **Install Now**.

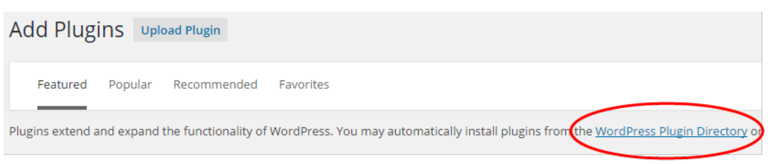
4. Click **Activate Plugin**.

To install the XML-RPC Modernization plugin manually:

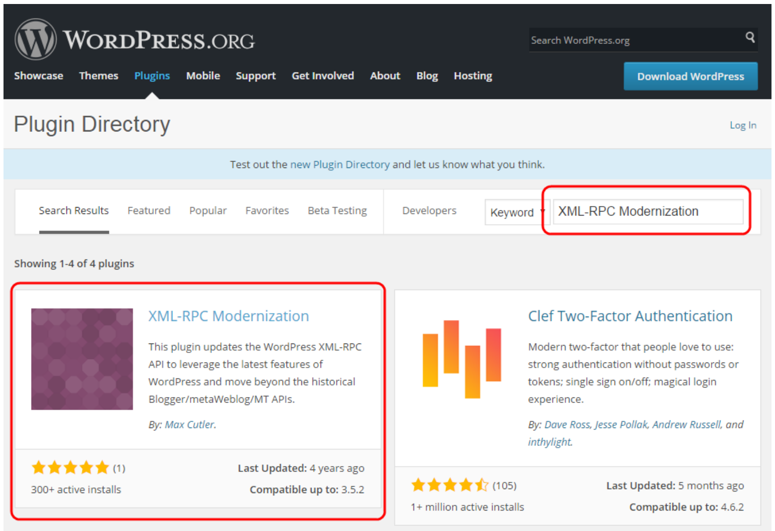
i. In your Wordpress site click **Plugins** > **Add New**.



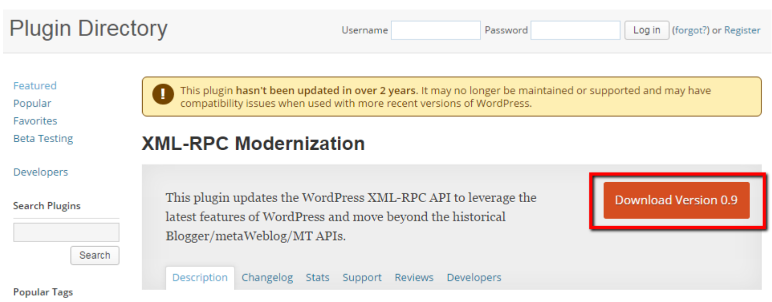
ii. Click **Wordpress Plugin Directory**.



iii. Search for "XML-RPC Modernization". The XML-RPC Modernization plugin is displayed.



iv. Click **Download Version 0.9**. A .zip file will download.



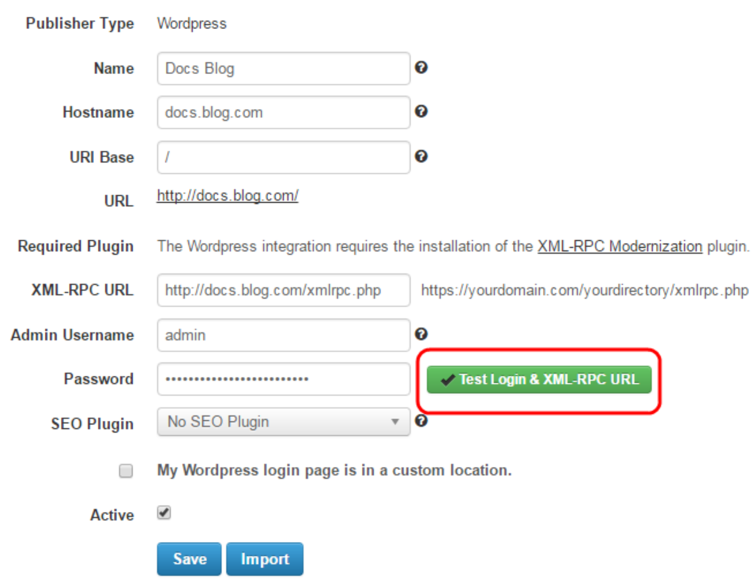
v. In your Wordpress site click **Plugins** > **Add New** > **Upload Plugin** > **Choose File**.

vi. Navigate to the .zip file and click **Open**.

vii. Click **Install Now**.

2. Add your Wordpress publisher.

Your Wordpress integration is complete. To test that the integration was configured successfully, click **Test Login & XML-RPC URL**.



This test will use your supplied credentials to create, and then delete, a test user account in your Wordpress install to ensure that the two tools are communicating.

Note: This user account will have an @compendium.com email address, with a unique key appended to the front. This user account is used solely for testing, in the off chance that the user account persists in your Wordpress install, please feel free to delete it.

If you see an error when conducting a test, visit Troubleshooting your Wordpress Integration for additional information.

14.4.2 Importing data from Wordpress

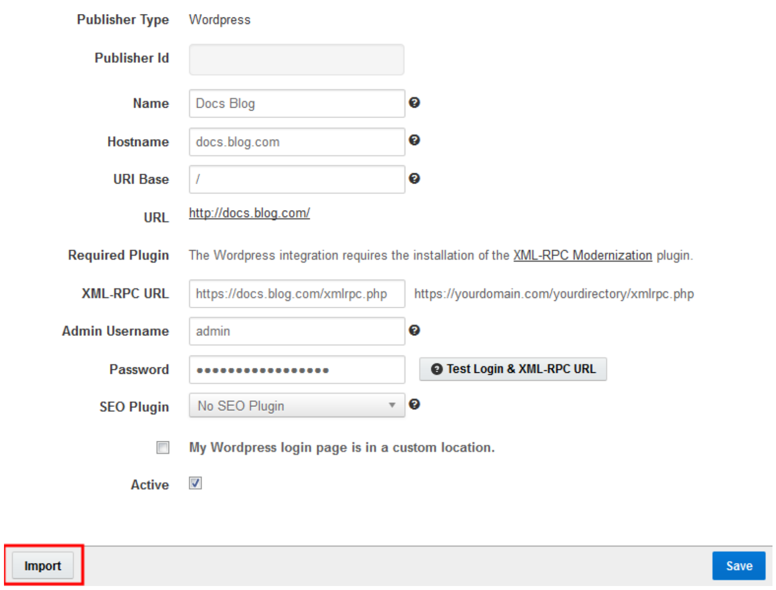
You can import data from your Wordpress installation into Oracle Content Marketing (OCM). The import from Wordpress will automatically:

- Import all content into OCM (overwriting any previously imported content).
- Import all attachments, images, and files associated with the content into the OCM CDN.
- Import all Users accounts that have created at least one asset in Wordpress.
- Import all categories - the import will overwrite any existing categories that have a matching URL token from Wordpress.
- Import all tags that have been associated with at least one asset in Wordpress

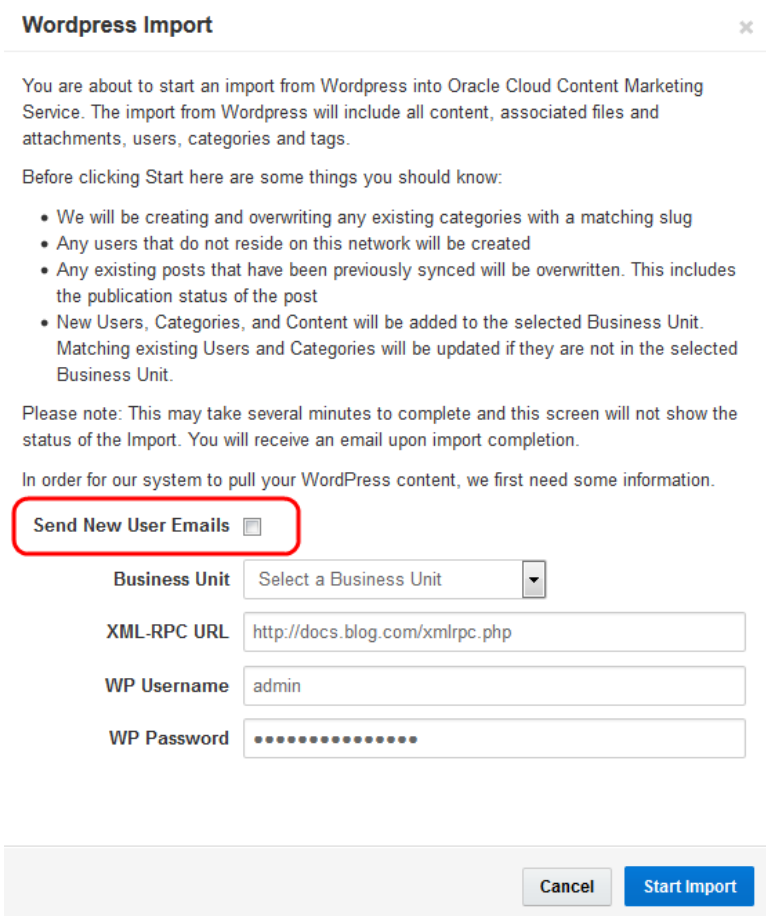
On completion of the import, an email will be sent to the user running the import to confirm that the import is complete. For larger Wordpress sites this import will take some time to complete.

To import data from Wordpress:

1. Navigate to **Settings** > **Publishers**.
2. Select the Wordpress publisher you want to import content from. If you have not already added one, see Adding a Wordpress publisher.
3. Click **Import**.



4. Choose whether to send welcome emails to all imported users. To send welcome emails check the box labeled **Send New User Emails**. By default, new user welcome emails will not be sent.



5. For licenses with more than one Business Unit, choose a Business Unit as the destination for the content imported from Wordpress.

6. Click **Start Import**. A modal will appear with an overview of the data that will be imported.

Your data from Wordpress will now be imported into Oracle Content Marketing. A job will work in the background to perform the import, you should see a notification indicating that your "Import is being processed".

You can feel free to navigate away from the Publishers management screen, the user who starts the import will receive an email notification when the data import has completed.

Imported content

Content imported from Wordpress will be associated with the default 'Text' content type that is configured with a Rich Text Editor. See Content Types for more information.

Imported user accounts

Users who have created at least one asset in Wordpress will have a user account in Oracle Content Marketing created for them. See Wordpress Integration FAQs for more information on these accounts.

14.4.3 Publishing content to Wordpress

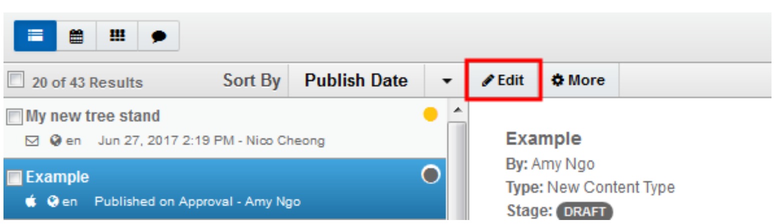
After your Wordpress integration is configured, publishing content to Wordpress is easy and automatic.

After the content has been fully approved through workflow, the content will automatically be sent to Wordpress and appear live on your Wordpress site.

The first step after completing the integration setup, is to ensure your asset is set to publish to Wordpress.

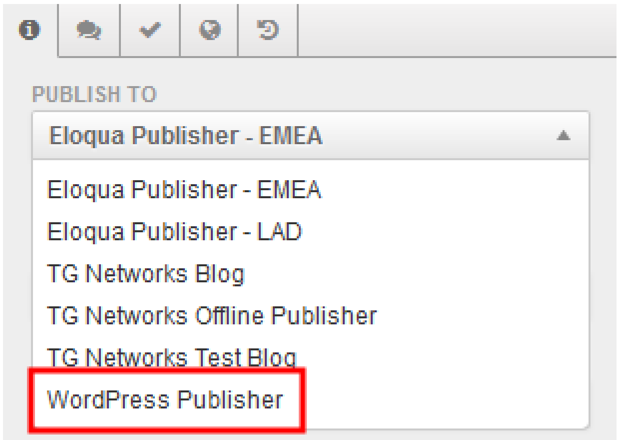
To configure content to be published to Wordpress:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset to be published and click **Edit**.



3. In the *Content Settings* tab, click the *Publish To* drop-down menu and select the Wordpress

publisher.



> **Note**: If your license is configured for multiple Business Units and you do not see the Wordpress publisher in the Publish To drop down, a user with the Business Administrator role will need to enable the Wordpress publisher for this specific Business Unit for the publisher to appear. See Changing the default publisher for more information.

4. Click **Save Content**.

Until the content has been fully approved through workflow, it will not appear live on your Wordpress site. Each time an asset is saved, Oracle Content Marketing will sync asset metadata with Wordpress.

> **Note**: Assets that are in draft status will be sent to Wordpress and will appear in your list of *All Posts* as a Draft. Until the asset has been approved through the marketing workflow, it will not appear on the live Wordpress site.

For a full list of metadata that is sent to Wordpress, view the Publisher Status Details from within the preview window within the Content Repository. A partial list of the metadata that Oracle Content Marketing sends to Wordpress includes:

post_title - The title of the asset

post_date - The creation date of the asset

post_modified - The last modified date of the asset

post_status - The status of the asset

post_name - The URL token for the asset

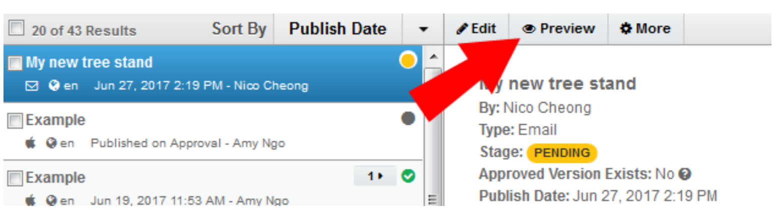
post_author - The author for the asset

post_content - The body content of the asset

custom_fields - Custom field data associated with a post

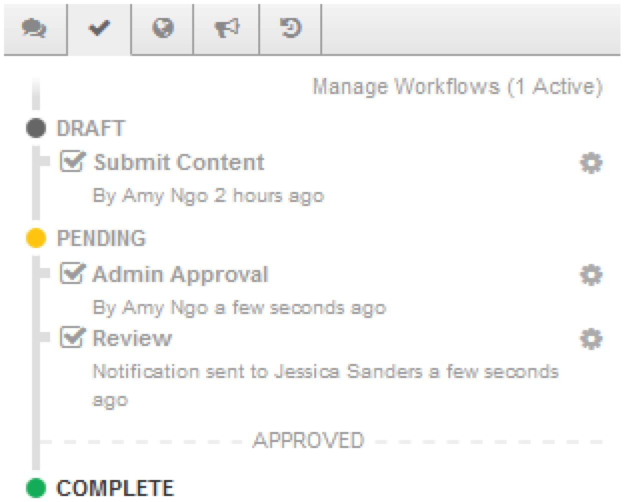
Custom field data will be sent with a post to Wordpress. It is not necessary for you to configure custom fields in your Wordpress instance. On first sync, if the custom fields do not exist on the post they will be created and populated with data from Content Marketing.

Content Marketing also supports the ability to see a preview of an asset on your Wordpress site before it is published live. Users can see a preview of the post by using the 'Preview' button located within the content repository.

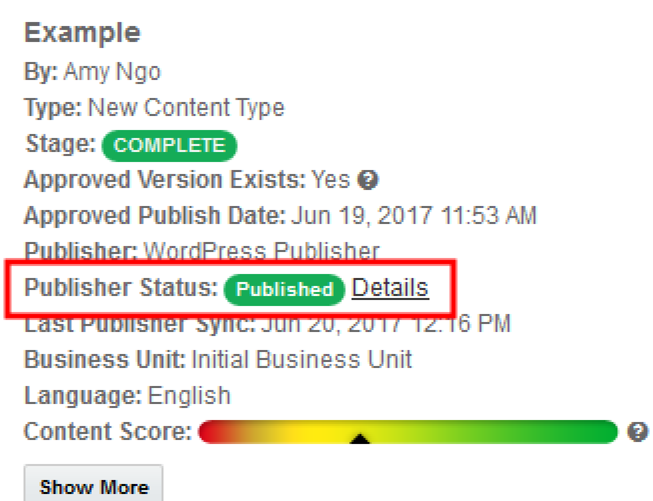


To publish content to Wordpress:

1. In the *Content Asset Workflow* tab, all workflow tasks will need to be completed leading up to the 'Approved' line for the asset to publish live on Wordpress.



2. Review the asset's publish status in the content repository. After the Publisher Status indicates that the asset has been successfully **Published**, you will see the asset display live on your Wordpress site.



Note: You may see an *In Progress* Publisher Status before the sync has completed. In the event the server is temporarily unavailable, the publisher will automatically attempt to re-sync the asset up to 12 times over a span of 8 hours. After 8 hours, the sync will fail. The retry schedule follows:

Retry Schedule	Publisher Action
30 seconds	Retry
1 minute	Retry
5 minutes	Retry
30 minutes	Retry
30 minutes	Retry
30 minutes	Retry
1 hour	Retry
1 hour	Retry
1 hour	Retry
8 hours	Retry

If you are having trouble syncing your Wordpress publisher, see Troubleshooting Wordpress Integration.

14.4.4 Troubleshooting Wordpress Integration

If you are unable to configure your Wordpress integration, see the following troubleshooting tips.

Ensure the correct plugin is installed

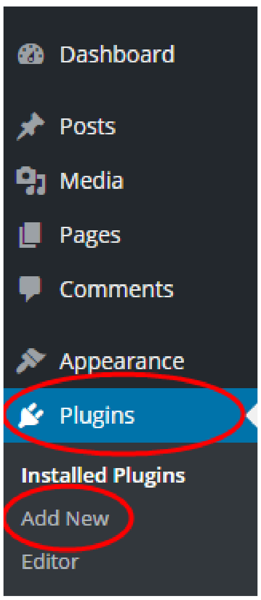
Install the XML-RPC Modernization plugin. This plugin extends Wordpress XML-RPC capabilities to include additional user management methods to create, delete and edit users within Wordpress. For more information on installing plugins, see Managing Plugins.

Prerequisite

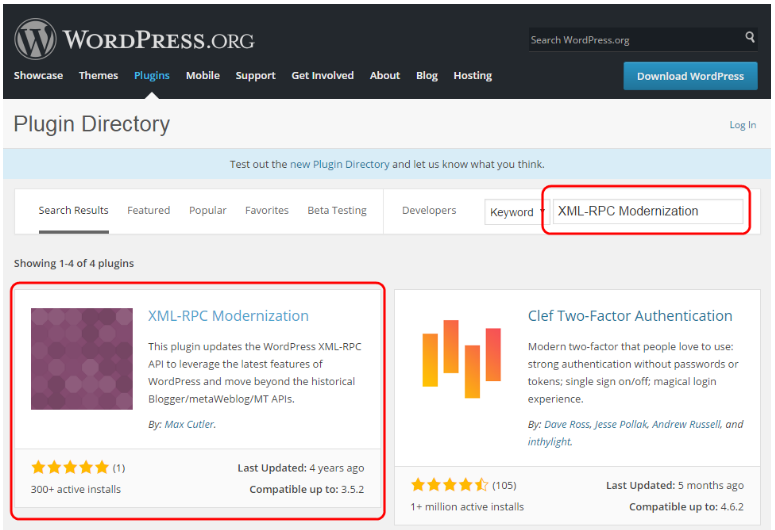
- The Administrator or Super Administrator right is required to install plugins.

To install the XML-RPC Modernization plugin automatically:

1. In your Wordpress site click **Plugins** > **Add New**.



2. Search for "XML-RPC Modernization". The XML-RPC Modernization plugin is displayed.

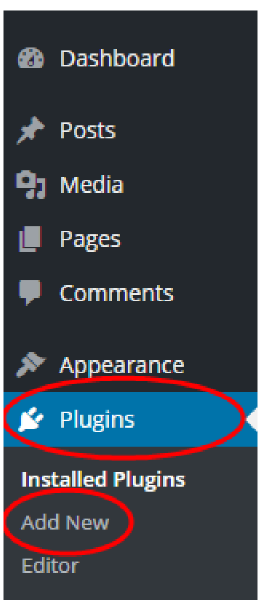


3. Click **Install Now**.

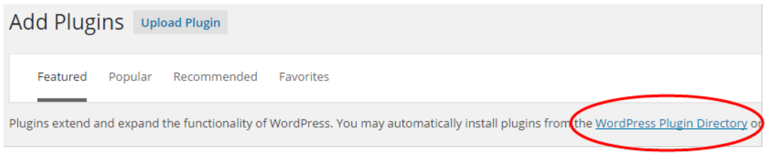
4. Click **Activate Plugin**.

To install the XML-RPC Modernization plugin manually:

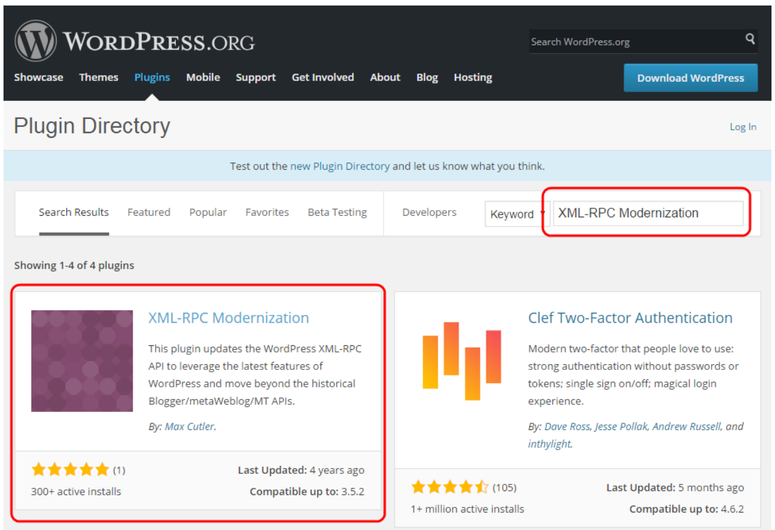
i. In your Wordpress site click **Plugins** > **Add New**.



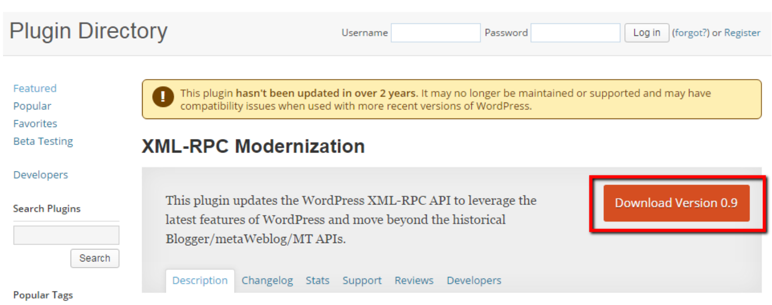
ii. Click **Wordpress Plugin Directory**.



iii. Search for "XML-RPC Modernization". The XML-RPC Modernization plugin is displayed.



iv. Click **Download Version 0.9**. A .zip file will download.



v. In your Wordpress site click **Plugins** > **Add New** > **Upload Plugin** > **Choose File**.

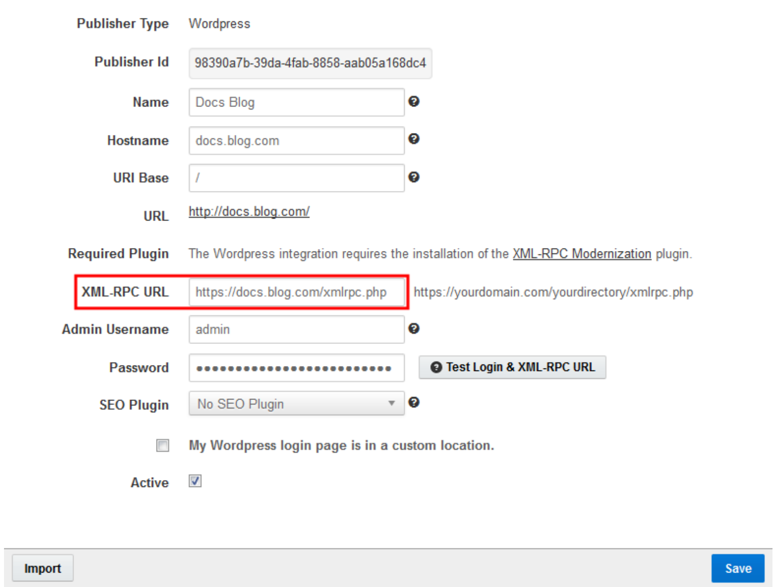
vi. Navigate to the .zip file and click **Open**.

vii. Click **Install Now**.

Check XML-RPC URL in a Browser

Ensure that the URL for xmlrpc.php is accessible in the browser from the URL provided. The browser should display “XML-RPC” server accepts POST requests only.

1. In Content Marketing, navigate to **Settings** > **Publishers**.
2. Click the Wordpress publisher.
3. In the **XML-RPC URL** field, copy the URL to your clipboard.



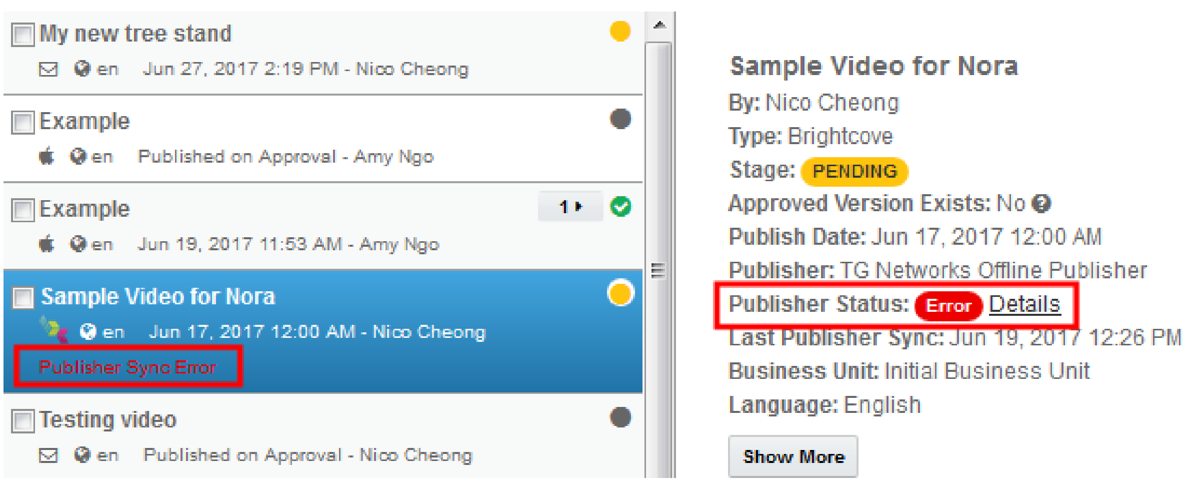
4. Paste the URL into a browser.

The browser should display “XML-RPC server accepts POST requests only" which indicates the XML-RPC API exists at that URL. If you do not see this message in the browser, AND the "Test Login & XML-RPC URL" connection test in Content Marketing is displaying an error message some additional troubleshooting may be necessary.

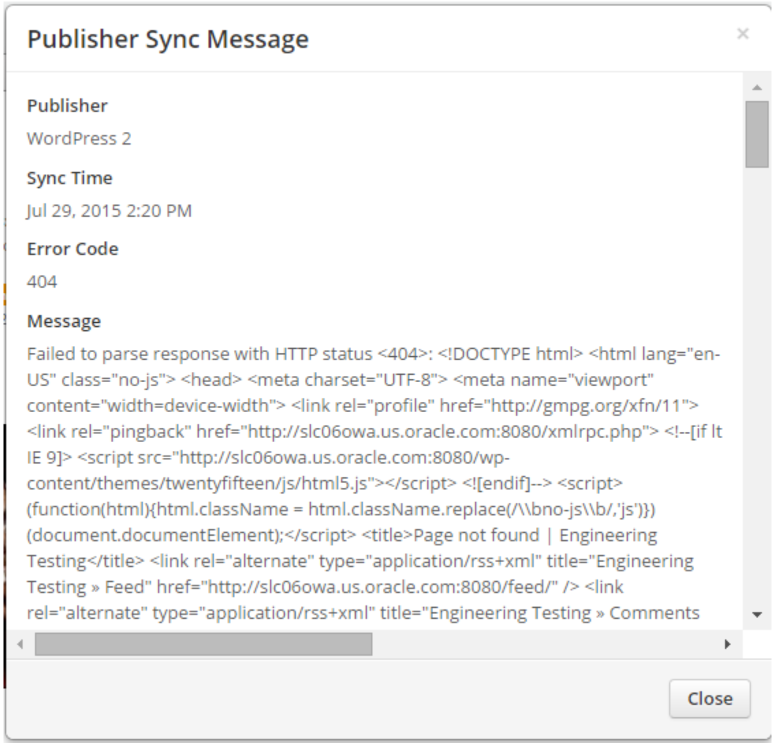
On occasion, IT teams will purposely restrict access to the xmlrpc.php to prevent malicious attacks. If the xmlrpc.php URL is restricted by IP address, you may not be able to successfully access the XML-RPC API through the browser. Supply the following IP range to your organization's technical team to whitelist access for Content Marketing: 209.167.231.0/24.

Publisher Sync Error: Error Code 404

This error message occurs when the Wordpress site cannot be found and is usually an indication that the integration has not been configured correctly. In the content list within the content repository, the **Publisher Status** will display *Error* or *Syncing* for any content assets with the affected publisher.



Clicking **Details** will display the last time the content asset was able to sync to the publisher.

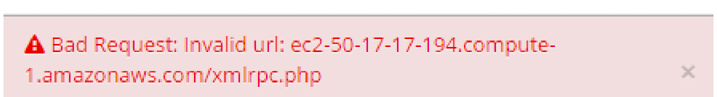


Troubleshooting

Ensure to test your Wordpress configuration by clicking **Test Login & XML-RPC URL** on the Wordpress publisher page. See Configuring Wordpress integration for more information.

Bad Request: Invalid url:

This error message appears after clicking **Test Login & XML-RPC URL** on the Publishers page if the XML-RPC URL is not correct.



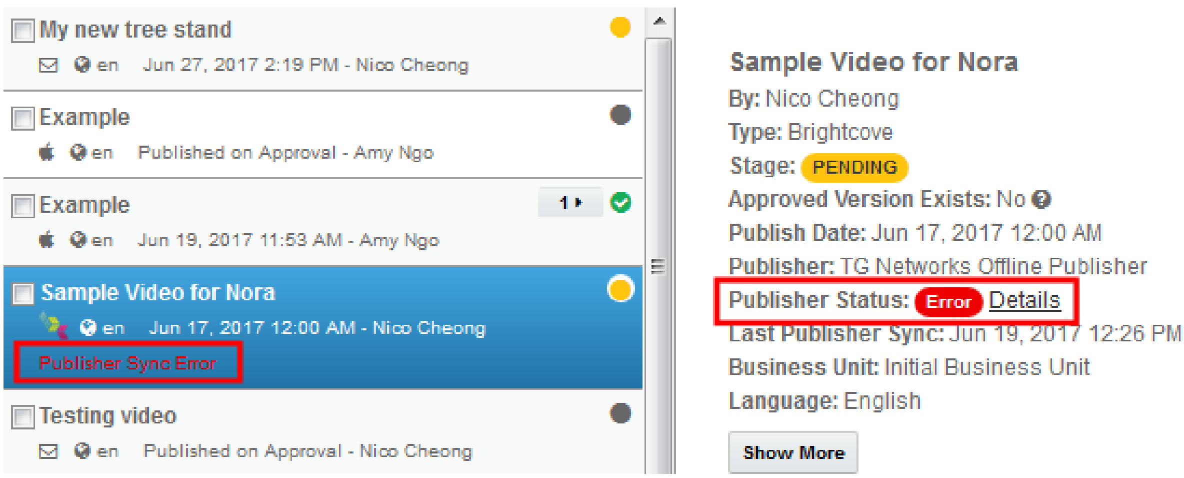
Ensure the XML-RPC URL entered is a fully qualified URL that includes "http://" and follows the format: http://yourdomain.com/yourdirectory/xmlrpc.php.

Contacting Technical Support

If these troubleshooting tips have not solved your Wordpress integration issue, you can provide Technical Support additional information to better troubleshoot your problem:

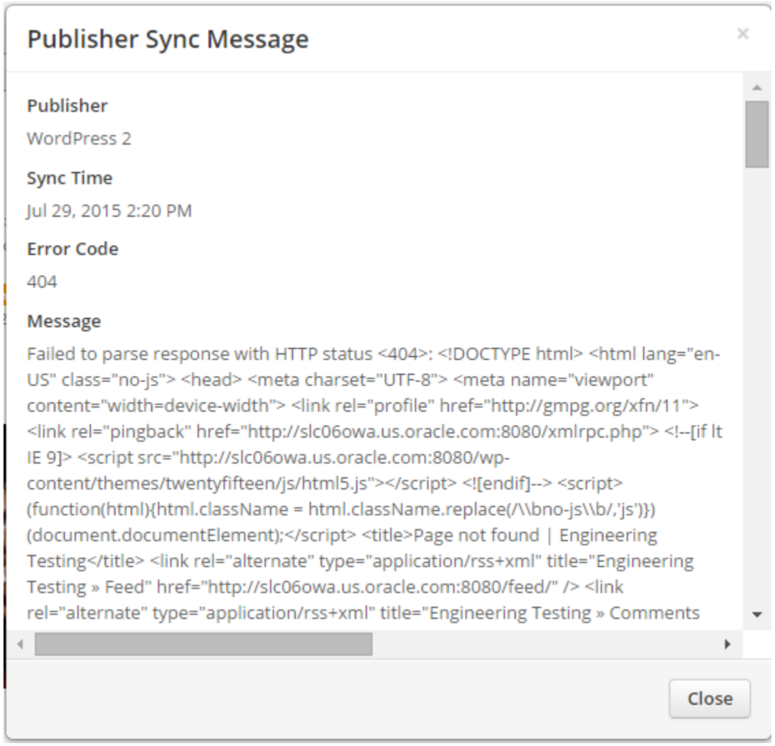
1. Navigate to **Produce** > **Manage Content**.

2. Select the content asset with the Publisher Sync Error and click **Details**.



3. Capture a screenshot or note the details of the Publisher Sync Message for your Technical

Support agent.

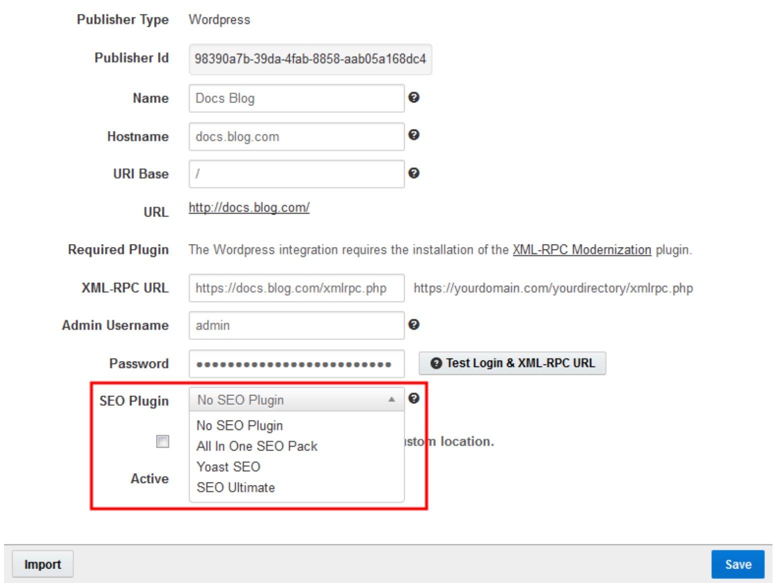


14.4.5 Integrating SEO plugins with your Wordpress publisher

You can configure your Wordpress publisher to integrate with a SEO plugin. Enabling this functionality enables you to send metadata such as page titles and meta descriptions with your content to Wordpress, stored in the respective fields created by specific SEO plugins.

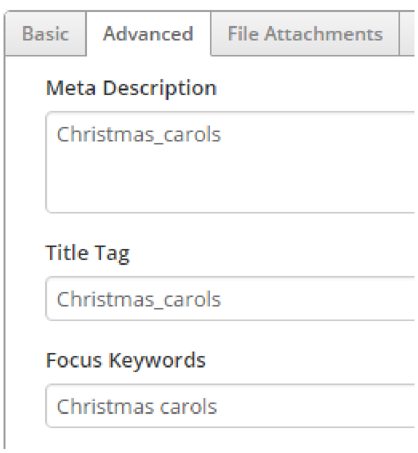
To integrate with SEO plugins:

1. Navigate to **Settings** > **Publishers**.
2. Select the Wordpress publisher.
3. Click the **SEO Plugin** drop-down list and select a plugin.

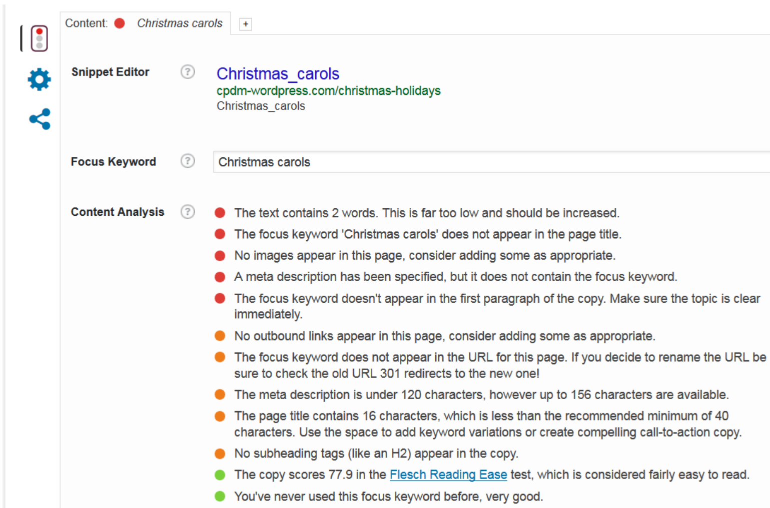


Yoast SEO

When Yoast SEO is selected, a **Focus Keywords** field appears in the editor within the **Advanced** tab.

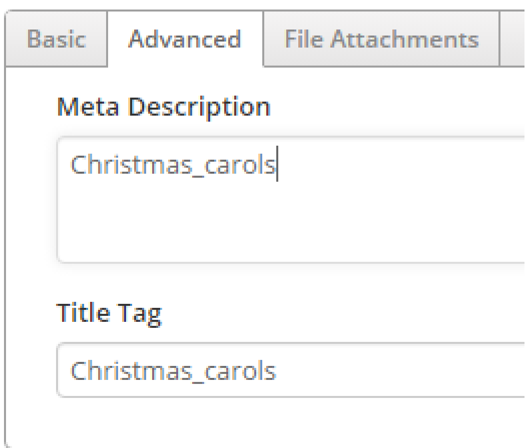


In Wordpress, the metadata appears in the post along with a Content Analysis.

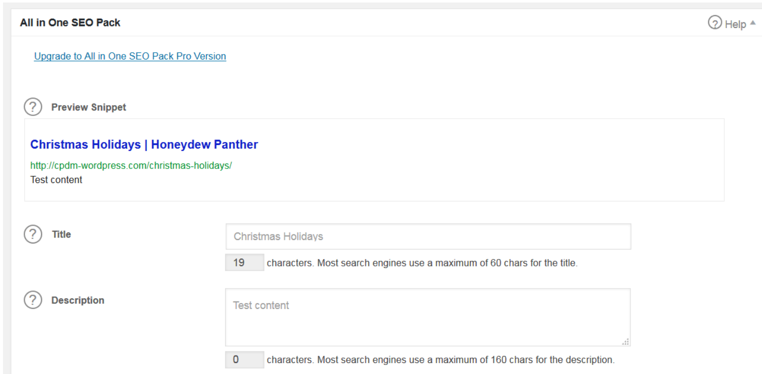


All In One SEO Pack

When using **All In One SEO Pack**, metadata is entered in the editor normally in the **Advanced** tab.

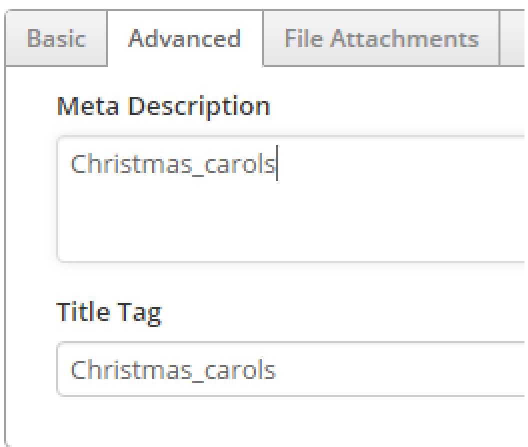


In Wordpress, the metadata appears in the post.

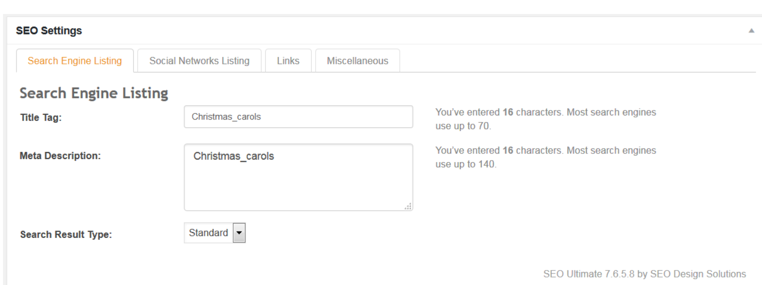


SEO Ultimate

When using **SEO Ultimate**, metadata is entered in the editor normally in the **Advanced** tab.



In Wordpress, the metadata appears in the post.



4. Click **Save**.

14.5 Drupal Integration

Oracle Content Marketing's integration with Drupal enables marketers to publish content to Drupal. Some common use cases for this integration can include:

- Publishing content that coincides with an event, either text or an image
- Publishing content that serves a purpose of thought leadership, marketing education, or promoting a marketing initiative (blog)
- Publishing content for a landing page

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Prerequisites

To configure this integration, you must have the following:

- An admin user account for your Drupal install
- The Oracle Content Marketing module for Drupal. See Overview of required modules for more information.

> **Note**: Contact your support representative to get access to this Oracle supported Drupal module.

- Several additional third party modules. These modules can be installed automatically or manually. See Overview of required modules for a list of the required modules.

14.5.1 Overview of required modules for Drupal

To integrate Content Marketing and Drupal, there are a series of required modules that must be installed in your Drupal installation.

The Oracle Content Marketing Module

Developed and supported by Oracle, the Oracle Content Marketing (OCM) module is required to integrate Content Marketing and Drupal. The OCM module is designed to automate the majority of the steps required to setup the integration. Once installed, the OCM module will attempt to pull in all required modules, and where needed, setup the configuration settings for the required modules.

> **Note**: Contact your support representative to get access to this Oracle supported Drupal module.

The OCM module requires the following additional Drupal modules, noted with each is the minimum required version for that module:

- Services (>=3.x)
- Chaos Tools (required by the Services module)

- REST Server (required by the Services module)
- Libraries (>=2.x)

  *The included module versions reflect support for integrating with Drupal 7.

The OCM module will attempt to automatically install this list of modules if you have configured your Drupal installation to automatically allow installation of module dependencies. The OCM module will also set up the needed configurations for each of the dependent modules. Customers that have already installed these modules, but are using an older version will be prompted with the choice to upgrade.

If dependencies are disallowed, an admin will need to ensure the following modules are installed manually or using a tool like Drush:

- Services
- Chaos Tools
- Libraries
- System (included with Drupal core)

Once installed, an administrative user will need to configure the Services module. For more information on the required configuration settings for the Services module, see Configuring Drupal modules.

14.5.2 Drupal support

Drupal version	Support status
6	Unsupported
7	Supported
8	Unsupported

14.5.3 Set up the Drupal Integration

Marketers can integrate Content Marketing to publish directly to Drupal using a Drupal Publisher. Configuring a Drupal publisher is a two step process:

1. Configure access to the Services REST API within your Drupal install.
2. Configure content type mapping and how data in fields should map from Content Marketing to Drupal.

Tip: It is possible to test the integration and publishing flows using a sandbox installation of Drupal. In order to test the integration using a Drupal sandbox, the sandbox must be publicly accessible without authentication or whitelisting restrictions.

Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

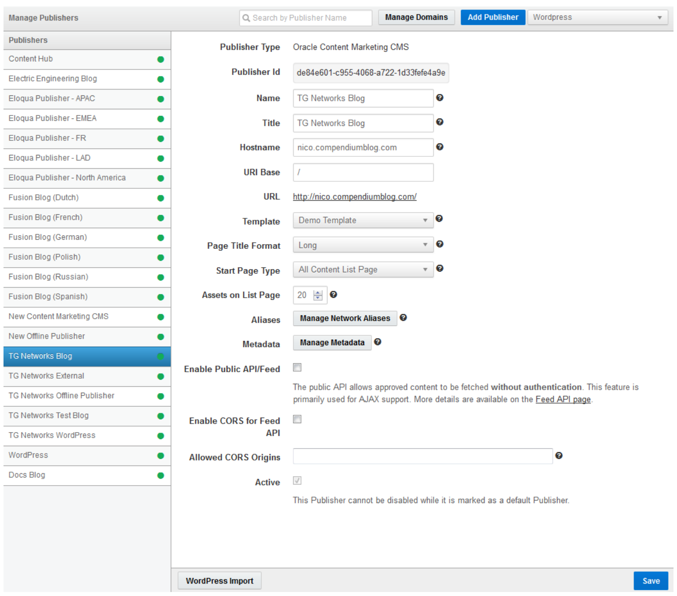
Prerequisites

- Installed the Content Marketing module and all dependent third party modules. See the Oracle Content Marketing module documentation for module requirements.
- Your Drupal admin user credentials.

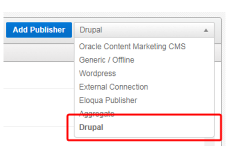
- For the Services module, have the REST API URL on hand. This URL is provided in the module’s settings.

To add a Drupal publisher:

1. Navigate to **Settings** > **Publishers**. The Manage Publishers page opens.



2. Click the drop-down list and select **Drupal**.



3. Click **Add Publisher**.

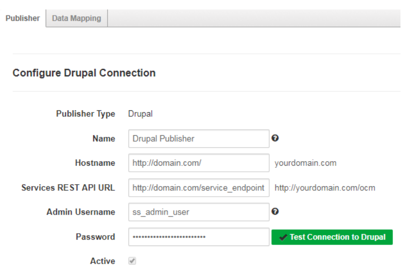
4. Complete the fields as required.

    - **Name**: Enter a unique name for the publisher. The name should be something that an end user should immediately recognize like the name of your organization’s website.

    - **Hostname**: Enter a hostname.

- **Services REST API URL**: Enter your Services REST API URL. Your URL will be composed of the domain + the path to your services endpoint. The OCM module will automatically create an endpoint name of *ocm*. As an example, that would make your endpoint www.[my-domain-name].com/ocm. Make sure to check the endpoint information in the Services module settings within your Drupal installation.
- **Admin Username**: Enter the username for your Drupal CMS.
- **Password**: Enter the password credentials for your Drupal CMS.
- **Active**: Toggles whether the publisher is enabled or not.

5. Click **Test Connection to Drupal** to ensure your configuration is successful.



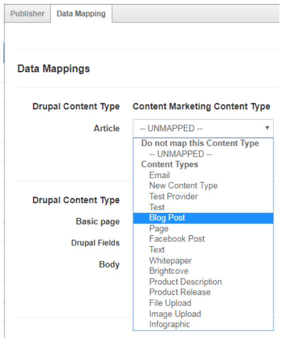
6. Click **Save**.

   You must set up a successful connection to move onto the next step, which is mapping data between Content Marketing and Drupal. Content Marketing will use this connection to pull back the content types configured in your Drupal installation.

7. With your connection settings saved, let's configure how to map your data. Click the **Data Mapping** tab.

8. Map each Drupal content type listed on the left, to the corresponding Content Marketing Content Type shown in the drop down on the right.

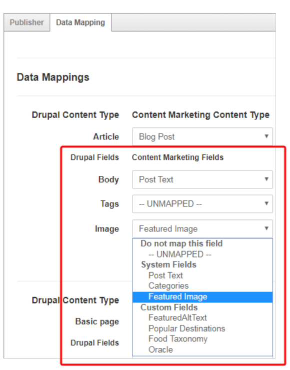
   Administrative users may elect to leave a Drupal content type *Unmapped*, which means content will not be sent to those Drupal content types.



For mapped content types, map each Drupal field to the corresponding Content Marketing field. Users will see a list of possible *System Fields* and all configured *Custom Fields*. Options that may display under *System Fields* include:

- Post Text (the main body of a content asset)
- Categories
- Featured Image
- Post Attachment (displays for the following Content Marketing types: file, image, and video)

Similar to content types, administrators may elect to not map data from Content Marketing to fields in Drupal. Choose *Unmapped* for those fields that should not be mapped.



Click **Save Mapping**.

Your Drupal publisher was added.

In the next topic, we'll walk through publishing a piece of content to your Drupal website.

Next steps

Publishing to Drupal

14.5.4 Publishing to Drupal

After adding a Drupal publisher, marketing users can publish content directly to a website running Drupal.

Introduction to publishing to Drupal

There are some key points that can serve as an introduction to understanding the concepts of using workflow and publishing to Drupal:

- Every time an asset is edited, a copy of the asset will be published to the Drupal content library.
- Before an asset is approved, the asset will live in Drupal with a status of *Not Published*.
- The first time an asset is sent to Drupal, the author's username and email address will be used to create that user within Drupal if they do not already exist. New users will not be assigned a role within Drupal.
- Users can determine when the approved version of the asset will be published on Drupal, either publishing the asset immediately once it is approved, or scheduling it for a time in the future.

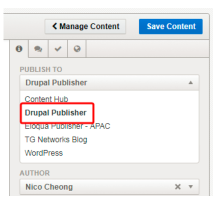
Note: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request. Availability for this feature is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

Prerequisites

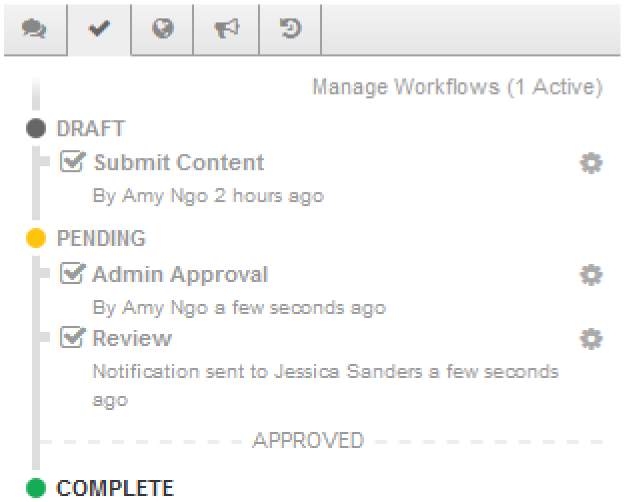
- A Drupal publisher that is correctly configured and set to active.
- For licenses with multiple Business Units, the Drupal publisher must be enabled for the correct Business Units. See Changing the default publisher for more information on enabling publishers for different Business Units.

To publish to Drupal:

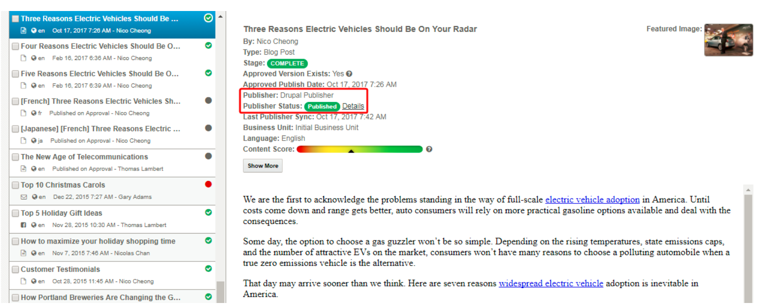
1. Navigate to **Collaboration** > **Library**.
2. Select the content asset to publish to Drupal and click **Edit**.
3. In the *Content Settings* tab, click the *Publish To* drop-down menu and select the publisher for your Drupal integration. In this case, the option is called **Drupal Publisher**.



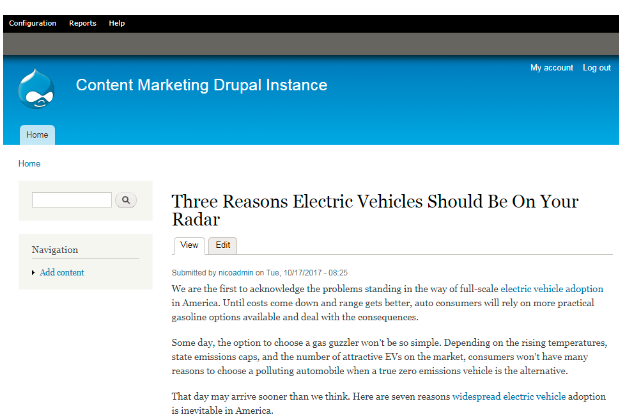
4. For this example, we will publish the asset immediately after it is approved. For that reason, do not set date in **Publish on Specific Date**.
5. In the *Content Asset Workflow* tab the asset must cross the approved line in order to be able to be published to Drupal. To test publishing, complete all tasks to move the asset through workflow to an approved state.



6. Review the asset's publish status in the content repository. After the Publisher Status has been updated to **Published** you can review the asset in Drupal.



Now you can switch to view your Drupal website. The content asset will appear, waiting to be used for any of your marketing communications.



14.5.5 Configuring Drupal modules

There are a series of third party Drupal modules that are required to configure an integration with Content Marketing. The following are instructions on how to properly configure the module(s) within Drupal.

Configuring the Services Module

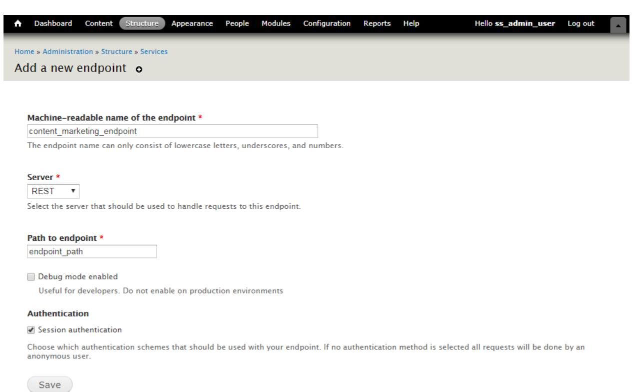
To begin, best practice would be to create a new endpoint to be used by the Content Marketing application.

Create new endpoint

To create a new endpoint:

1. In Drupal, navigate to **Structure** > **Services**.
2. Click **Add**.
3. Create the machine readable name for the endpoint.
4. For **Server**, select **REST**.
5. Create the path to endpoint.
6. Under Authentication, ensure **Session authentication** is enabled.

When completed, your configuration should look like this with the noted options enabled:



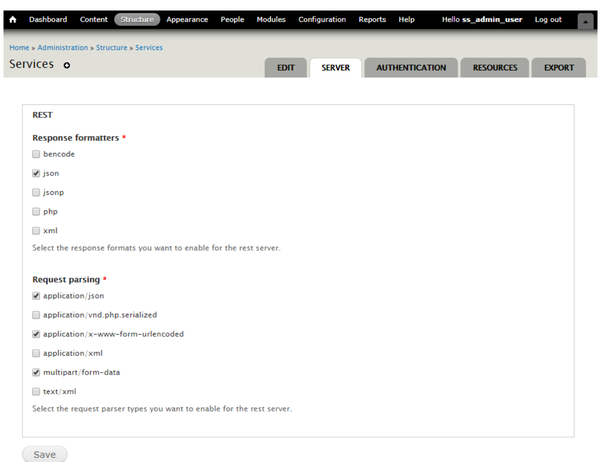
Edit new endpoint

Now that you've created your new endpoint, edit the endpoint to finish the configuration.

Server

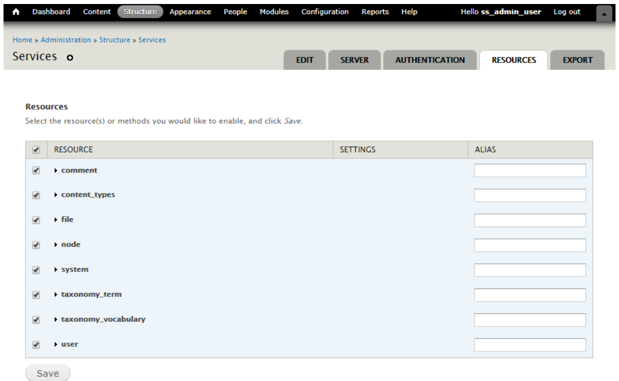
- *Response Formatters*
  - Ensure **json** is enabled.
- *Request Parsing*
  - Ensure the following are enabled:
    - application/json
    - application/x-www-form-urlencoded
    - multipart/form-data

When completed, your configuration should look like this with the noted options enabled:



Server

Under the **Resources** tab, ensure all of the resources are enabled and click **Save**.



14.5.6 Drupal - Additional Resources

The following are some useful references from Drupal.org as you work through your configuration:

- Drush - A useful command line tool for interacting with Drupal code, including the installation of modules.
- Guide to constructing your Services REST API URL.

15 Social and linked accounts

You can promote published content assets to Twitter, Facebook, and LinkedIn. Promoting is the process Content Marketing uses to transfer content asset data to another application or platform. Promoting content to your social platforms can increase your followers and drive awareness and traffic back to your company website or blog.

Note: Integrations with Oracle Eloqua, Oracle Social Relationship Management, and Oracle Responsys are also available, as well as various Apps. Availability for these integrations is specific to product trim. See the Feature Availability Programs document or contact your account representative for more information.

15.1 Promoting to linked accounts

See the following chart to learn about what content is promoted to each application.

Linked Account	What is promoted?
Eloqua	Published assets are promoted to Eloqua to be stored and used in building campaigns.
Responsys	Published assets are promoted to Responsys to be used for B2C cross-channel marketing.
Facebook, Twitter, LinkedIn	Published assets are promoted to the social account.

Options for promoting content assets

A promotion for a content asset can be configured in two ways:

- Immediately after the content asset is approved.
- Scheduled for a specific date and time.

15.2 Linking accounts

Before you can promote content, you must first link your accounts.

To link an account:

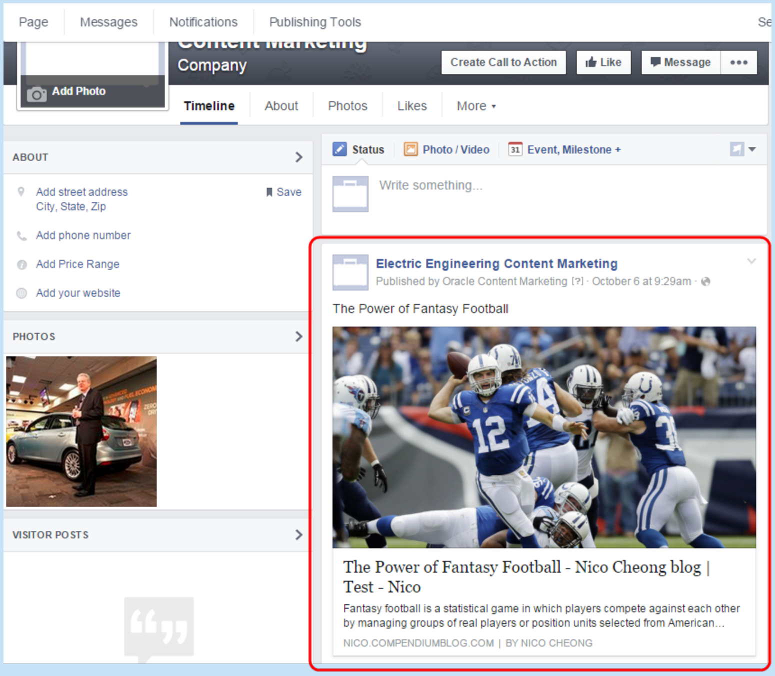
1. Navigate to **Distribution** > **Social & Linked Accounts**, the *Linked Accounts* page opens.
2. Click the **Add Account** button that corresponds with the type of account that you want to add, a configuration window opens.

3. Login to your account to authorize Oracle Content Marketing to access your account information and follow the prompts to finish linking the accounts. When completed, the window closes and your account is added to the *Linked Accounts* list.

15.3 Promoting content via Oracle Content Marketing

Promoting is the process Content Marketing uses to transfer content asset data to another application or platform. You can promote content to the out-of-the-box social channels within Oracle Content Marketing, or to a more complete set of social channels using Oracle Social Relationship Management, or GaggleAMP. When you promote content via Oracle Content Marketing, bit.ly is used to provide a shortened URL.

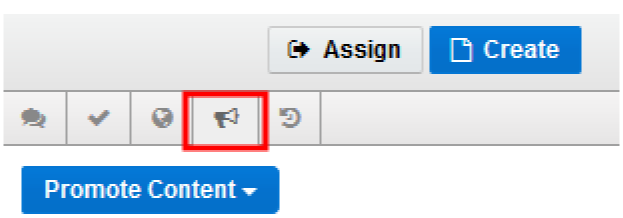
Example: Content assets promoted to Facebook display within the Facebook page:



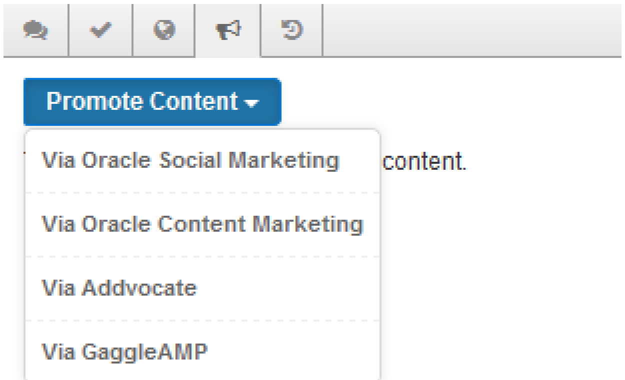
To promote content:

1. Navigate to **Collaboration** > **Library**, the content management page opens.

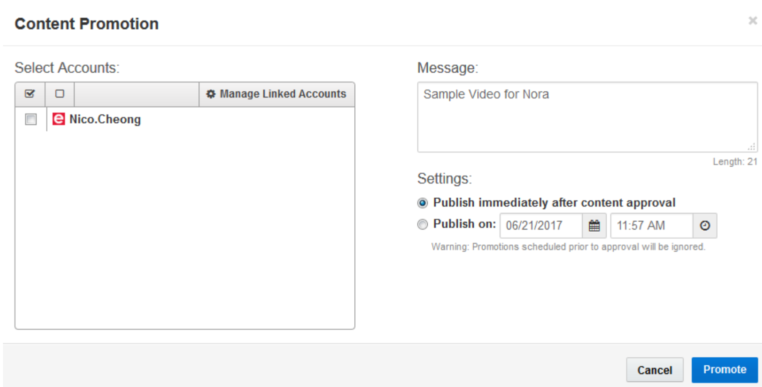
2. Select the content that you would like to promote, and select the *Promote* tab, signified by a megaphone icon.



3. Click the **Promote Content** drop-down list, then select **Via Oracle Content Marketing**, the *Content Promotion* window opens.



4. Complete the fields as appropriate.



- **Select Accounts**: Select the check box next to the accounts you want to promote across.
- **Manage Linked Accounts**: Click to manage your linked accounts. You can link new accounts or remove any existing accounts from this dialog.
- **Message**: Enter your promotion message. The content asset's title will be populated in the message field by default.
- **Publish immediately after content approval**: Select this option for the promotion to be published immediately once the content asset has been approved in workflow.
- **Publish on**: Select this option to promote the content asset on a specific date and time.

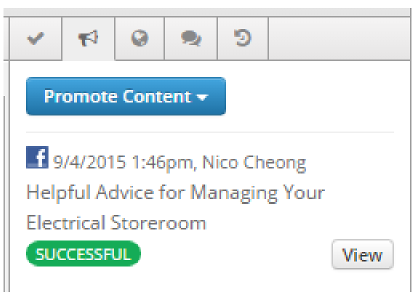
- **Promote to Facebook as an Image**: Select this option to promote an image from your content asset to Facebook.

5. Click **Promote**.

The asset was promoted, however, the asset may or may not be published to the linked account yet depending on the workflow stage of the content asset and promotion configuration:

- **Approved assets**

  When approved, and **Publish immediately after content approval** is selected, the promotion will be published immediately and you can manage the post from the respective social account. The promotion status will change to **Successful** once the promotion is live. Click **View** to view the promotion details.

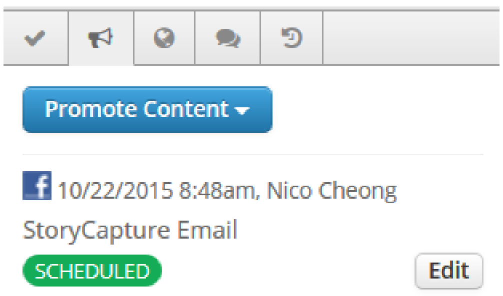
  

- **Assets pending approval**

  When an asset has not yet been approved, and **Publish immediately after content approval is selected**, the promotion status will display **Pending Post Publication** until the asset is approved. Click **Edit** to modify or cancel the promotion.

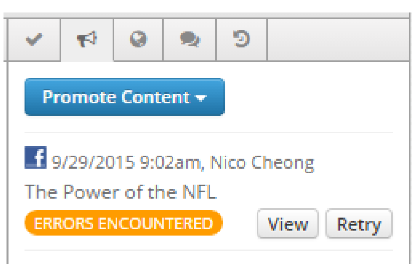
- **Scheduled assets**

  If scheduled for a future date, the promotion status will display **Scheduled** until the publish date. Click **Edit** to modify or cancel the promotion.



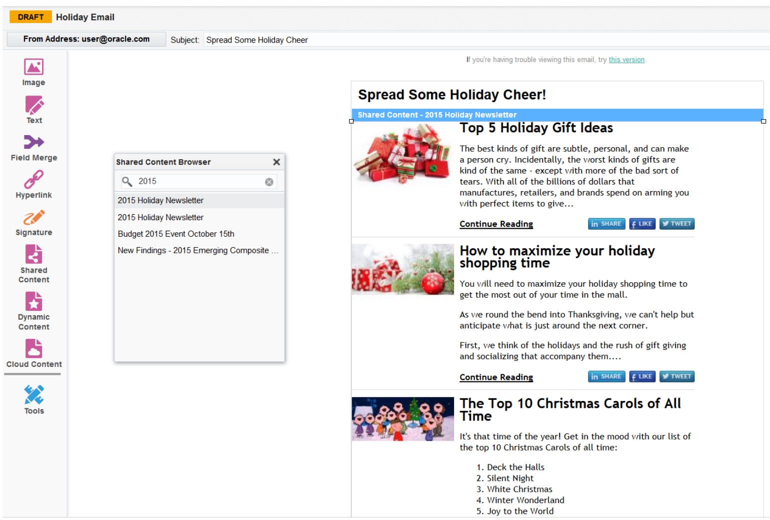
- **Failed promotions**

  In the event a promotion fails: an email will be sent to you, a **Retry** button will appear in the *Promote* panel, and the promotion status will change to **Errors Encountered**. Click **View** to learn more about the error, or click **Retry** to reattempt the promotion.



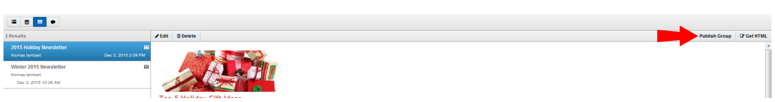
15.4 Promoting multiple assets as a content group

You can promote content groups to Eloqua to use Content Marketing content groups in your Eloqua email campaigns and landing pages. See Content Groups to learn more about these capabilities.

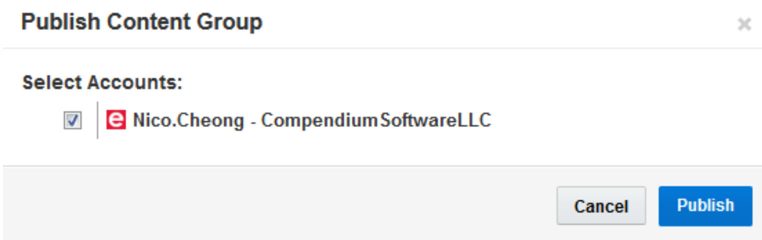


To promote content groups to Eloqua:

1. Navigate to **Collaboration** > **Groups**.
2. Select the content group you want to promote.
3. Click **Publish Group**.



4. Select an Eloqua linked account to promote the content group and click **Publish**.



The content group is promoted to Eloqua. In Eloqua, the content group will appear in your Shared Content folder, waiting to be used for any of your marketing communications.

See Editing Content Marketing assets in Eloqua for more information.

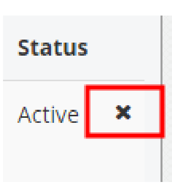
15.5 Removing access to linked accounts

You may remove access to your linked accounts. By doing this, you will no longer be able to promote posts to these applications.

To remove a linked account:

1. Navigate to **Distribution** > **Social & Linked Accounts**, a complete list of all linked accounts opens.

2. Locate the account that you want to remove, then click the X. The account is removed, and will no longer display on the *Linked Accounts* page.



16 Library

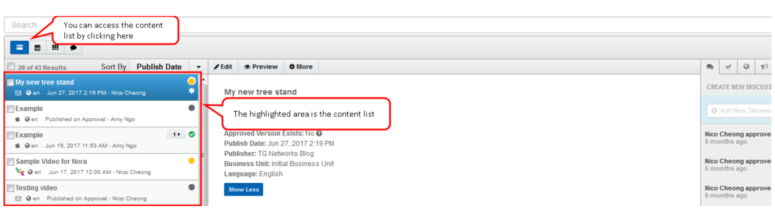
The content repository allows you to store your marketing content, including ideas still in development, keeping them ready until it's the perfect time to publish. The content repository organizes and contextualizes content during the planning process.

> **Tip**: Users with access to more than one Business Unit have access to the Business Unit toolbar to add data from other Business Units to your current view to gain insight on activity from multiple teams.

Navigate to **Collaboration** > **Library** to access the content repository. When managing your content, there are three main areas of the interface that enable you to manage your content assets.

The content list

The content list provides a list of all content within the content repository. For each content asset, the content list displays information specific to that asset, including: content language, publish date, author, as well as visual cues to indicate the working state of the asset. Combined with filtering, simple sorting options above the content list help users find content assets that meet specific criteria.

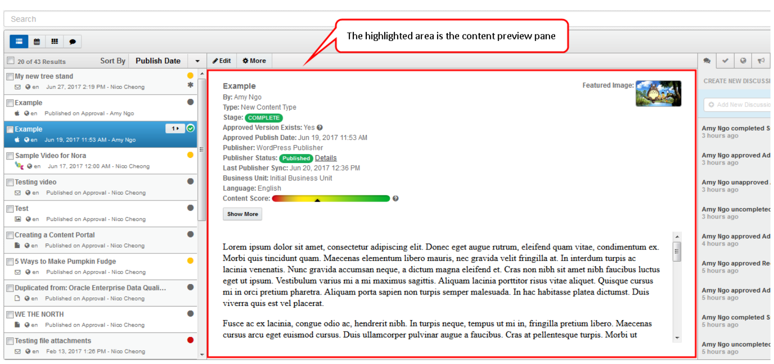


Tasks

- Understanding content items in the content list
- Sorting the content list
- Scanning the content repository

The content preview

The content preview pane provides users a preview of a content asset and a list of its associated metadata. From within the preview pane users can perform a select set of actions like previewing how an asset will look when it is published, copying content to other Business Units, repurposing assets into another content type, and viewing content version history.



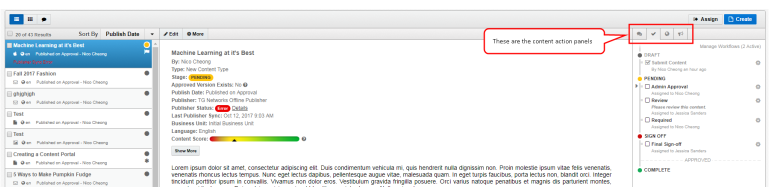
Tasks

- Understanding content metadata
- Previewing content assets

- Adding content to content groups
- Copying content to other Business Units
- Repurposing content
- Reviewing content revisions

The content action panels

The content action panels provide the ability to review and perform actions on content workflow, promote content, manage localized assets, engage in discussion about the asset, and review content revisions, all without opening the content editor.



✎ **Learn more**: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

Tasks

- Managing content workflow
- Promoting content via Oracle Content Marketing
- Managing localized assets

- Creating content discussions
- Reviewing content revisions

16.1 Creating content assets

You have the ability to create content assets that will automatically publish once approved through the assigned workflow. Marketers can configure content to display in configurations using text, images, videos and documents that best support their marketing campaigns.

Marketers can create assets and start drafting a post immediately, or they can create an 'idea', where an idea is saved with just a title until the time the idea is assigned out to be fulfilled. Assignments are typically drafted by an editor that will select the type of content best suited for that idea.

> **Note**: Content Marketing will automatically save your asset in the background while you are working in the text editor. Autosave is the automatic and constant saving of a content asset. When using the Oracle Content Marketing text editor, your content asset will autosave after every 100 characters added to the asset or after 30 seconds of inactivity.

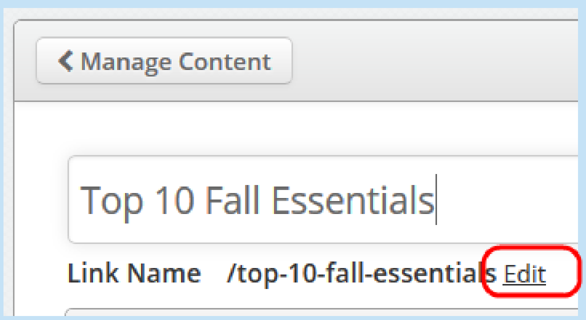
To start a content asset as an idea:

1. Navigate to **Collaboration** > **Create Content**.
2. Enter a title for your content asset.

Content titles are used for different purposes depending on the publish location. When publishing to a content hub or Wordpress site, the content title is used as the 'headline' of a post. However, when publishing to Eloqua or Responsys, the content title is used as the filename for the piece of content and will also appear within the content as a title. This title can be modified within Eloqua and Responsys.

Content Marketing will restrict the length of a title to a maximum of 255 characters. If a content asset title is longer than 255 characters, the user will be prompted with an error when attempting to save until the time the title length has been reduced.

Tip: If you want to customize the keywords used in the URL, click **Edit** next to the Link Name displayed beneath the title field. Edit the link name as needed then click **Done**.



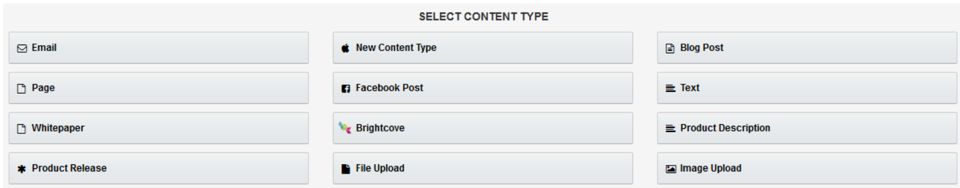
3. You have created the basis for an idea for a Content Asset, click 'Save' to save your idea to your library.

Create the first draft of your content asset:

Users can create their first draft from an existing saved idea, or they can create their first draft immediately from an idea of their own.

To create the first draft of your content asset:

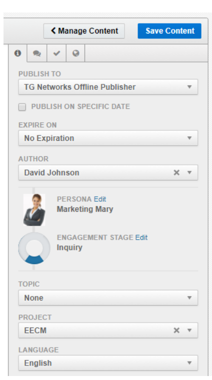
1. Select a content type. If your list of available content types do not accurately reflect the type of content you would like to create, see Creating content types for more information on creating new content types.



2. Create content for your asset by typing directly into the content editor. Learn more about customizing your content assets.

> **Note**: If you'd like to copy/paste content into the content editor, it is recommended to paste content first into Notepad and then into Content Marketing. Pasting content into Notepad will strip the text of all application specific formatting and HTML. Certain rich text editing programs contain hidden formatting plication specific formatting and HTML. Rich text editing programs contain hidden formatting that may not be HTML standards compliant markup that may interfere with web formatting. Learn more about copying text from Word.

3. On the **Content Settings** tab, configure the options as needed:



- **Publish on Specific Date**: Select to choose a specific date to publish the content asset. Select a date and time for the asset to be published.
- **Expire On**: Select an expiry option.
    - **No Expiration**: Content will not expire. By default, assets are not set to expire.
    - **Specific Date**: Content expires on a specific date. Set a time and date for content to be expired.
    - **Relative Date**: Content expires on a relative date. Set an amount of days or months content will expire after.
- **Author**: Select an author to assign to the content asset.
- **Persona**: Select a persona to associate to the content asset.
- **Engagement Stage**: Select the engagement stage the content asset is intended for.
- **Topic**: Select a topic to associate to the content asset.
- **Project**: Select a project to assign to the content asset.
- **Language**: Select a language to assign to the content asset.

4. (Optional) Configure the asset using the action panels.
    a. Content discussion subscriptions
    b. Managing content workflow
    c. Managing localized assets
5. Click **Save Content** when you are finished creating the content.

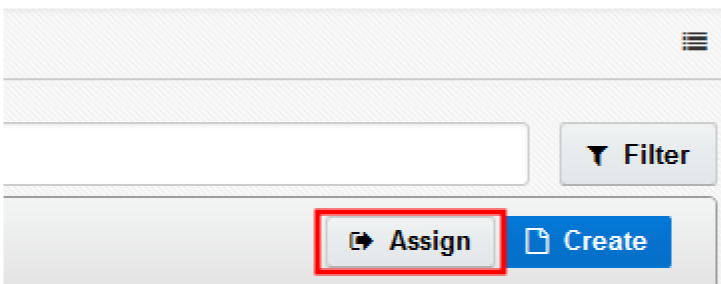
Note: The WYSIWYG editor will make modifications to your HTML including the removal of certain HTML selectors. See Storage of assets and files FAQs to learn more.

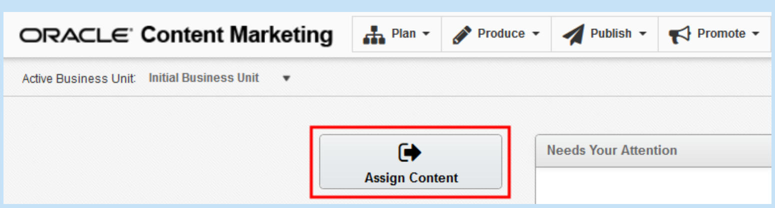
16.2 Assigning content to authors

You can assign a new content idea to an author, instructing them to begin the content creation process.

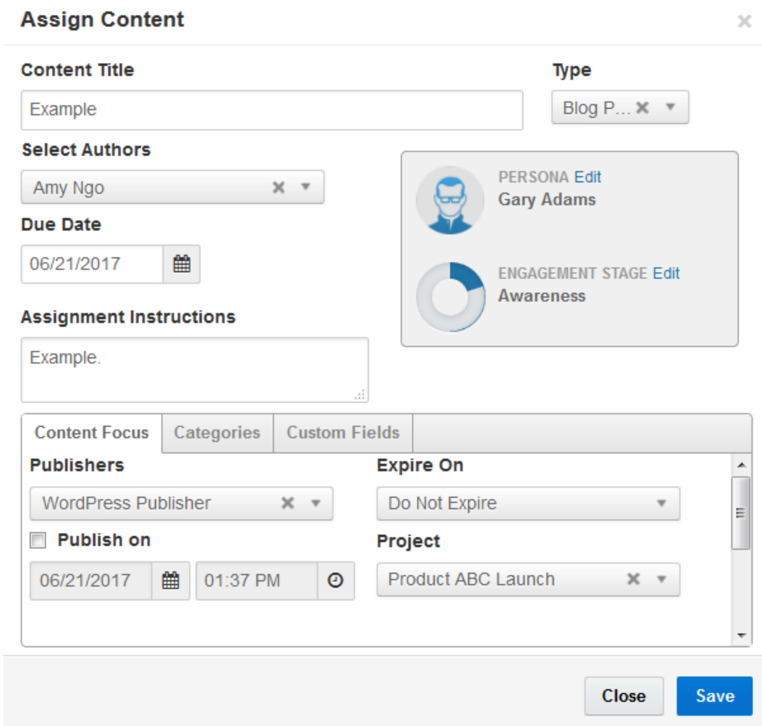
To assign a new content idea to an author:

1. Navigate to **Collaboration** > **Library** > **Assign**.



> **Tip**: You can also click **Assign Content** in the upper left-hand corner of the dashboard, typically seen immediately after you log in.
>
> 
>

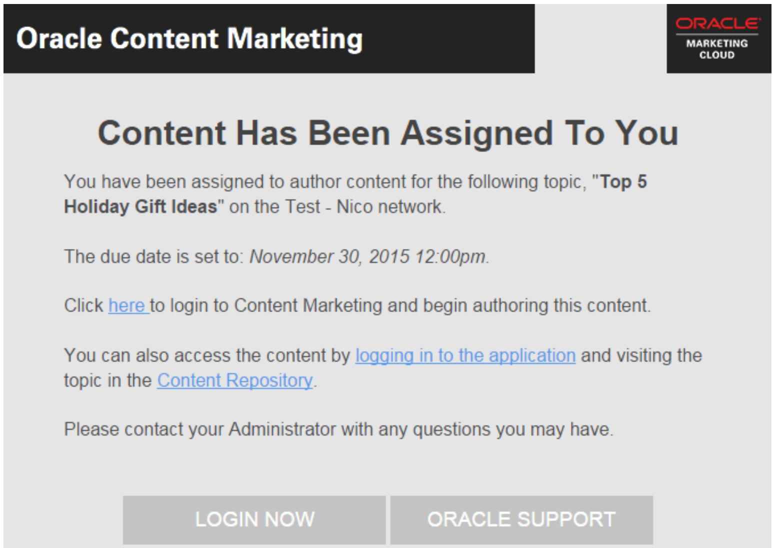
2. Complete the content assignment details:



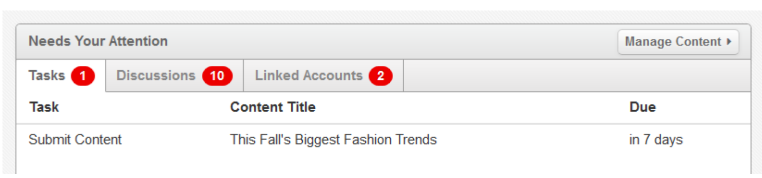
- **Content Title**: Enter a title for your content asset. The title should provide a brief description of the content, it will appear as a heading to the asset once it's published, it will also be a part of the asset's URL. The maximum character length for a content asset title is 255 characters.
- **Type**: Select one of the content types that have been defined in your license. If you need to create more content types, see Creating content types for more information.
- **Author**: Select an author to assign to create the content asset.
- **Due Date**: Select a date for the content asset to be completed by.
- **Persona**: Select a target persona to be associated with the content asset.
- **Engagement Stage**: Select an engagement stage to be associated with the content asset.
- **Assignment Instructions**: Enter any applicable content assignment instructions.
- **Content Focus**: Select a publish date and project for the content asset.
- **Categories**: Select categories to associate the content asset with.
- **Custom Fields**: Fill in data for any of the custom fields tied to the selected asset.

3. Click **Save**.

When a content assignment is created and assigned to an author, the author will be sent an email notification. and will see a notification on the dashboard in the *Needs Your Attention* section.



The author will see a notification on the dashboard in the *Needs Your Attention* section. Authors can then click on the task, or follow the link sent automatically to them in the trigger email, to view and complete an assignment.



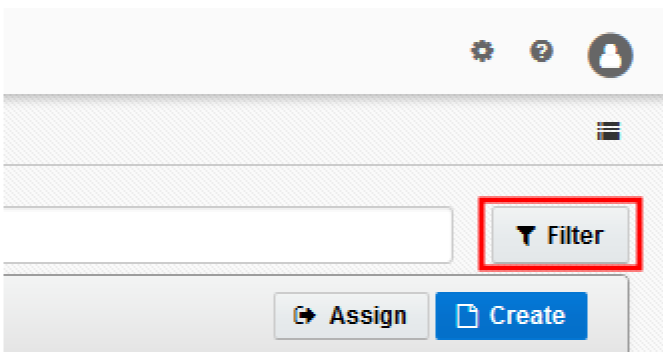
Note: You can search for assigned content by going to the *Manage Content* page (Navigate to **Produce** > **Manage Content**), then filter the results by *Stage*. See Filtering the content repository for more information.

16.3 Filtering the content repository

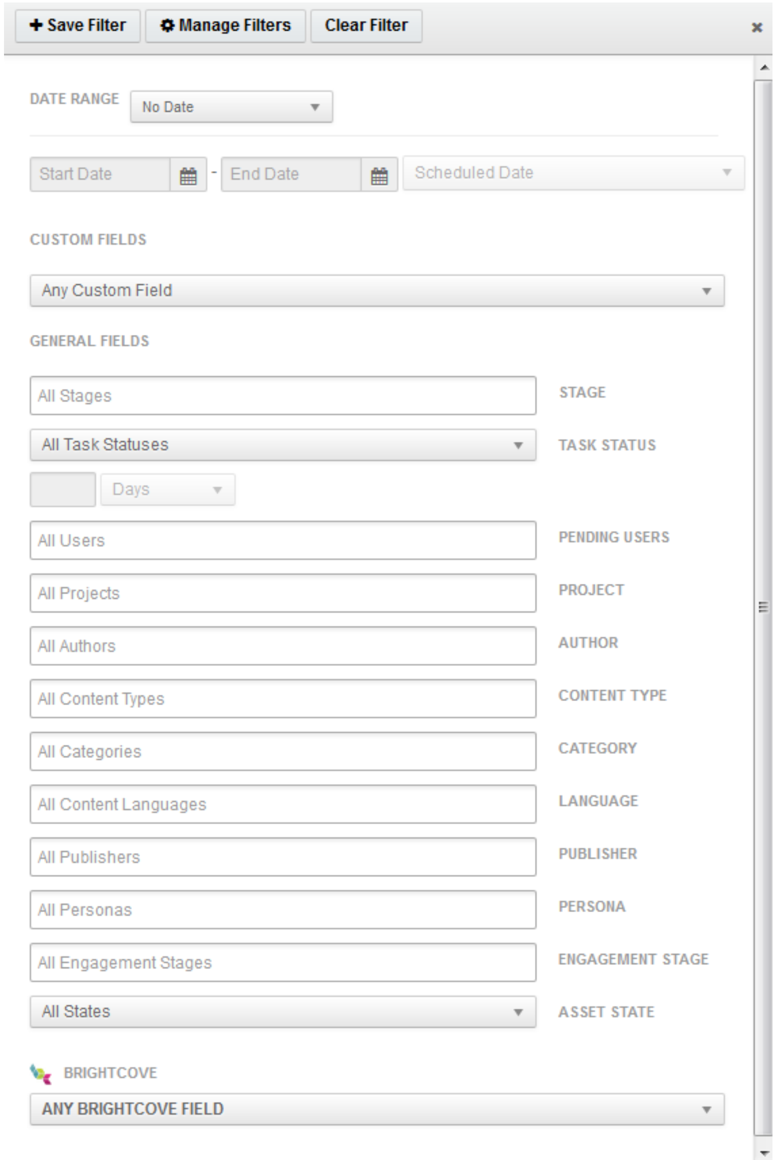
Filter the content repository to display specific content assets in the content list. Filter by date, workflow stage or other fields to locate the desired content assets. Alternatively, you can use the search to query against the body of asset and it's attachments.

To filter the content repository:

1. Navigate to **Collaboration** > **Library**. The search field and filter button will appear.
2. Click **Filter**.



3. Choose from the following filter options. Many filter options can have more than one value.



- **Date Range**: Select a date range to filter assets.

  Choose from a predefined date range or define a **Custom** date range. Users must choose one of the options to enable the data selectors, and the asset status menu.

  Selecting a **Custom** date range will default to filtering for the next day, or use one of the predefined date ranges to display results for the **Previous 7 Days** or **Previous Month**, as well as the **Next 7 Days** or **Next Month**. **Previous Month** will look at the previous 30 days, and **Next Month** will look at the next 30 days.

Assets must have a specific date set, according to the following definitions, to be returned with these filters. Assets without dates will not be returned.

- **Scheduled Date**: Displays all content assets that are scheduled to be published within the selected date range and do not have a post publication record.
- **Published Date**: Displays content assets that have been published at least once. Filter will return matches based on the asset's most recent publish date.
- **Expiration Date**: Displays content assets that have an expiration date set within the selected date range. An asset set to expire with a relative date on an asset that has not yet been published will not return.

- **Custom Fields**: Choose a custom field.
- **Stage**: Filter assets by current workflow stage.
- **Task Status**: Use this filter option to find content with active tasks that will be due soon, or are overdue. Users have two options at their disposal:
  - **Due Within**: This option will return content with active tasks that will be due soon. To use this option choose a date range, either Day or Month, and enter a number for the appropriate duration.

    This filter will return any results for the remainder of the current day plus the duration entered. Let's say for example at 3:00pm I search for all content with active tasks that are Due Within 3 days. This filter configuration will return content with active tasks for the remainder of the day after 3:00pm as well as the next three full days.
  - **Past Due Up To**: This option will return content with active tasks that are overdue. To use this option choose a date range, either Day or Month, and enter a number for the appropriate duration.

    This filter will return results any results for the current day plus the duration entered. Let's say for example at 3:00pm I search for all content with tasks that are Past Due Up To 3 days. This filter configuration will return all content with active tasks past due for the current day up to 3:00pm, as well as the previous three full days.
- **Pending User**: Filter assets that are pending approval in workflow by specific user.
- **Project**: Choose to show one or more of your existing projects.

- **Author**: Choose from any of your authors, or All Authors.
- **Content Type**: Choose a content type in your license, or **All Content Types**.
- **Category**: Choose from any of your categories.
- **Language**: Choose from any languages that have been defined for tagging content assets.
- **Publisher**: Choose a publisher.
- **Persona**: Choose from any of your personas.
- **Engagement Stage**: Choose an engagement stage.
- **Asset State**: Choose an asset state. See Expiring content assets for more information.
- **Brightcove**: Filter Assets from a selection of Brightcove fields including:
  - Video Name
  - Player Name
  - Player ID
  - Video ID
  - Tags (If configured in App settings)
  - Short Description (if configured in App settings)

4. Options exist to manage the current filter configuration, or save a configuration for re-use. Options available include:
   - **Save Filter**: Click to save the filter selection with a unique name.
   - **Manage Filters**: Click to manage your saved filters.
   - **Clear Filter**: Clears the filter selections made.

The content list will display content according to your filter criteria.

Each value selected in the filter, will display as items directly below the search bar, to help you remember what options were selected even when the filter menu is not open.

To clear the filter criteria:

- Click the **X** in the criteria below the search bar, OR
- Click the **X** in the criteria in the *Filter* pane.

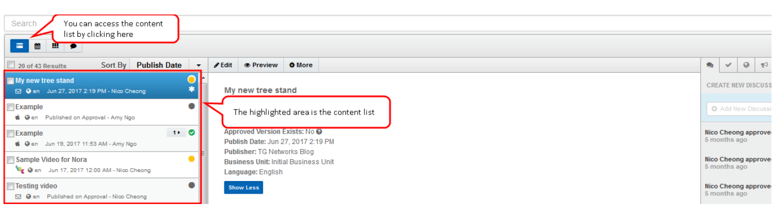
To clear all criteria:

- Click **Clear All** below the search bar, OR
- Click **Clear Filter** in the *Filter* pane.

16.4 The content list

The content list provides a list of all content within the content repository. For each content asset, the content list displays information specific to that content asset, including: content language, content author, as well as visual cues to indicate the content state. You can sort the list for the content assets that meet your criteria, and scan the list for the visual cues that interest you.

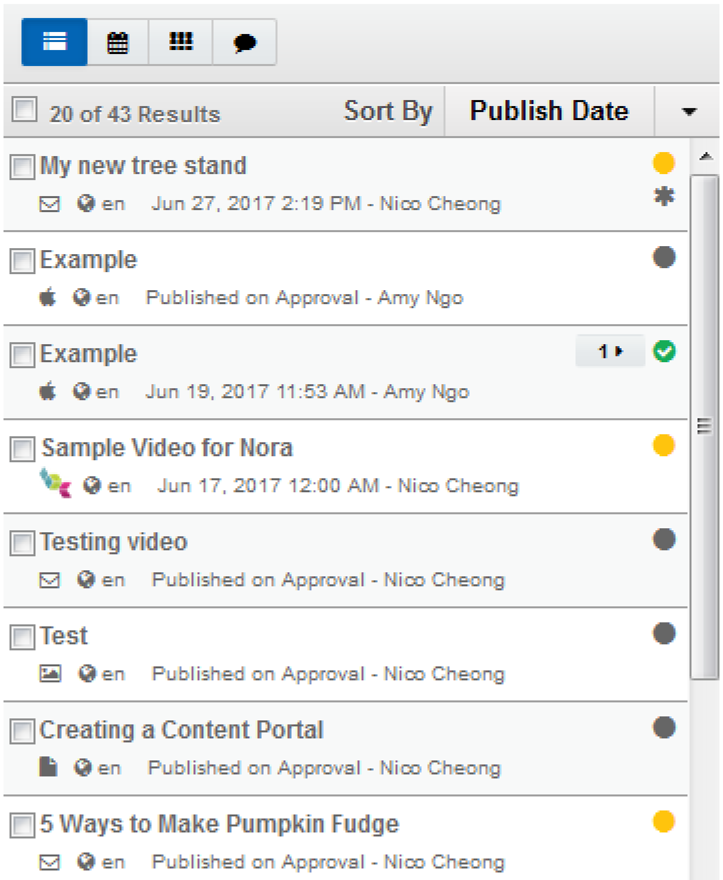
Navigate to **Collaboration** > **Library** to access the content list.



- Understand content items in the content repository
- Sort the content repository
- Scan the content repository

16.4.1 Understanding content items in the content list

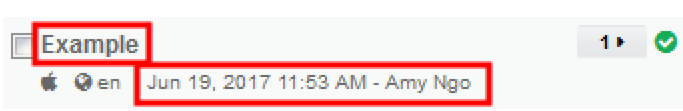
Content list items display specific data to help you visually identify content. The content list is displayed on the left side of the content repository.



Let's take a look at all of the data displayed on content items:

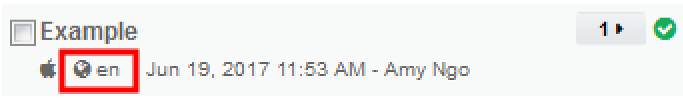
- **Content Overview Information**

  Content overview information such as the title, publish date (including scheduled publish date), and author are all displayed within the content list. This information is set when assets are created.



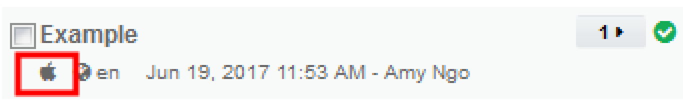
- **Content language**

  The language code of the content is indicated here. You can set content language when creating content or repurposing content for translation.

- **Content type**

  The content asset's content type is indicated here. Content type is specified when content is created.

Now that we've taken a look at the data displayed on a content list item, let's take a look at the various status icons that may display.

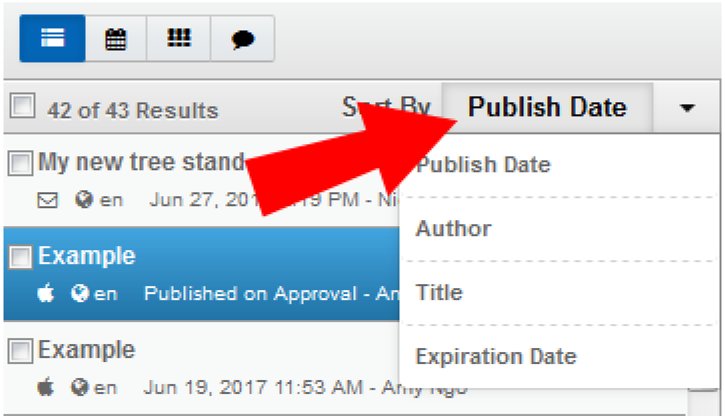
16.4.2 Sorting the content list

You can sort the content list to display content assets in the repository according to the order you want them displayed.

To sort the content list:

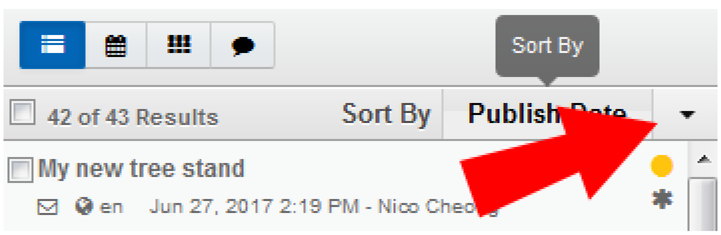
1. Navigate to **Collaboration** > **Library**.

2. Click **Sort By** and select an option to sort the content list.



- **Publish Date**: Sorts the content list by content publish date.
- **Author**: Sorts the list alphabetically by author.
- **Title**: Sorts the list alphabetically by content asset title.
- **Expiration Date**: Sorts the list by content expiration date.

3. Click **Sort Direction** to change the sort order direction. Content will be sorted alphabetically or numerically according to the selected sort option.



The content list was sorted.

Related

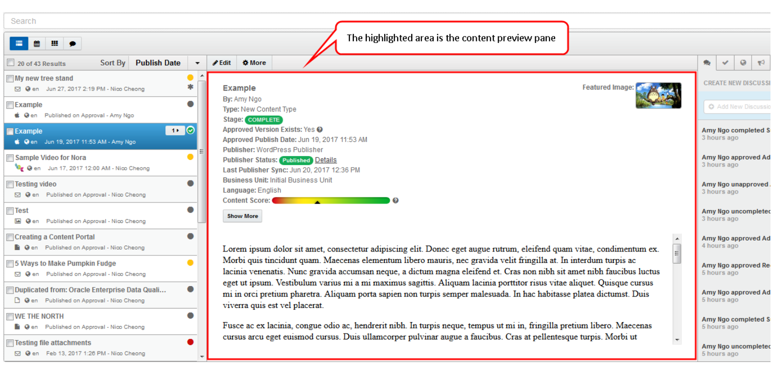
16.4.3 Scanning the content repository

There are various icons that can appear on content assets within the content repository that help visually identify content status. Let's take a look at all of the visual cues:

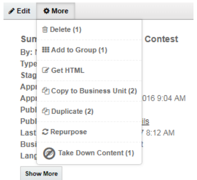
Icon	Description
	Content is in the draft workflow stage. The colour of this icon will reflect the current workflow stage for the asset. The color displayed will vary depending on your workflow configuration, and will reflect the color you've associated with a given workflow stage.
	Content is approved, and an approved version of the content exists.
	Content is scheduled to expire.
	Content is expired.
3	Content is repurposed and belongs to a collection. Click the icon to expand the collection of repurposed content assets.
1	Content is under discussion and you have been mentioned.
	Content has unsaved changes.
	Content needs your attention. This will display if there is a workflow task, other than draft, that is active and assigned to the user.

16.5 Using the content preview pane

The content preview pane is the middle pane which displays a preview of content assets. Select an asset in the Content List to view the content preview pane.



Clicking **More** in the preview pane provides a number of actions for your content. The actions available will vary, depending on whether your content has a published version or not. The following is a list of those actions and what they do:



- **Delete**: Deletes the content asset.
- **Add to Group**: If the content asset is published, adds content to a content group.
- **Get HTML**: Displays a window with the full HTML of the content asset. Select the contents and copy it to your clipboard to copy the HTML.
- **Copy to Business Unit**: For licenses with additional Business Units, users with access to other Business Units have the option to copy content to those other Business Units. See Copying content to other Business Units for more information.
- **Duplicate**: Makes a quick duplicate of the content asset. *'Copied From:'* is appended to the title of the duplicated asset.
- **Repurpose**: Creates a new, repurposed version of the content asset.
- **Version History**: Views the content version history for the asset.
- **Take Down Content**: Removes the content asset from the location it was published.

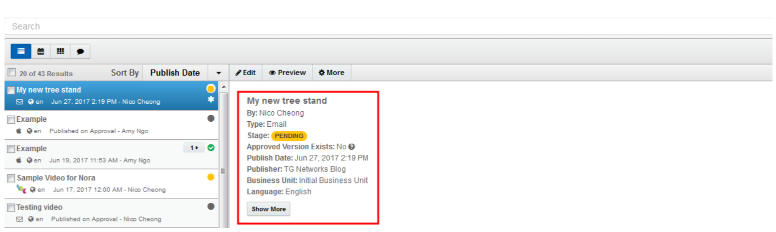
Clicking **Show More** in the preview pane provides additional information about the asset.

The information displayed follows:

- **Stage**: The workflow stage of the content asset.
- **Business Unit**: The Business Unit of the content asset.
- **Approved Version Exists**: Indicates if an approved version of the content exists. Once content is approved, that version of the content will remain approved (and live, depending on the publish date) even though subsequent versions go through workflow stages. You may edit content without affecting the approved version if the **Content Edits Don't Affect Workflow** right is granted.
- **Publisher**: The publisher for the content asset.
- **URL**: Displays the full URL of the content asset.
- **Categories**: Displays any categories the content asset is associated with.
- **Sticky**: Indicates if the content asset has been set to be sticky.

16.5.1 Understanding content metadata

When a content asset is selected, the content preview pane displays a summary of content metadata.



Clicking **Show More** in the preview pane provides additional information about the asset.

The metadata fields are:

- **Type**: The content type.
- **By**: The content author.
- **Persona**: The target persona for the content asset.
- **Engagement Stage**: The engagement stage for the content asset.
- **Created**: Displays the date the content asset was created.
- **Publish Date**: Displays the date the content asset was published.
- **Stage**: The current workflow stage.
- **Approved Version Exists**: Indicates if an approved version of the content exists. Once content is approved, that version of the content will remain approved (and live, depending on the publish date) even though subsequent versions go through workflow stages. You may edit content without affecting the approved version if the **Content Edits Don't Affect Workflow** right is granted.
- **Approved Publish Date**: The date the content was approved and published.
- **Expiration Date**: The content asset's expiry date.
- **Business Unit**: The Business Unit containing the content asset.

- **Language**: The language associated with a content asset, most commonly the language used in the asset.
- **Sticky**: Indicates if the content asset has been set to be sticky.

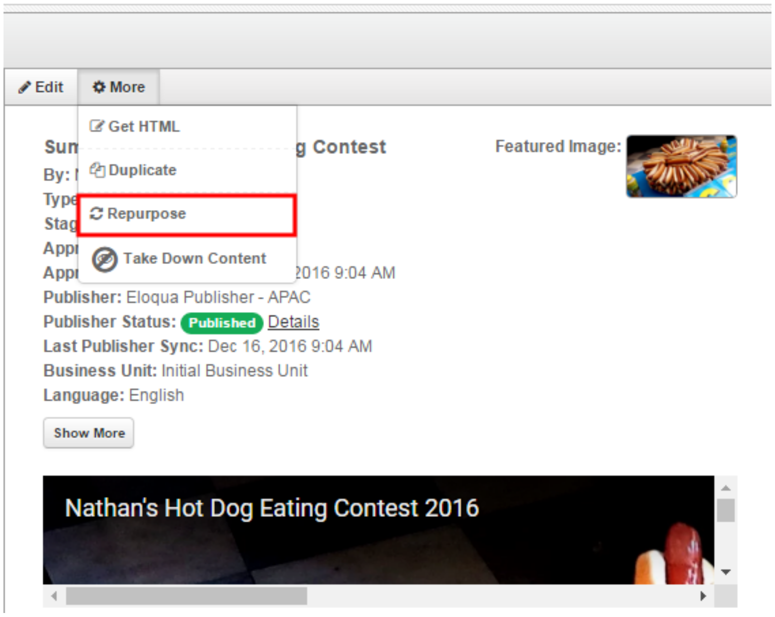
16.5.2 Repurposing content

You may want to repurpose content for another language, medium, or channel. Content Marketing allows you to repurpose content which then links content assets together as collections.

> **Note**: A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection is created when content assets are either repurposed or translated into another language.

To repurpose content:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset you want to repurpose and click **More > Repurpose**.



3. Select a content type for the new content asset.

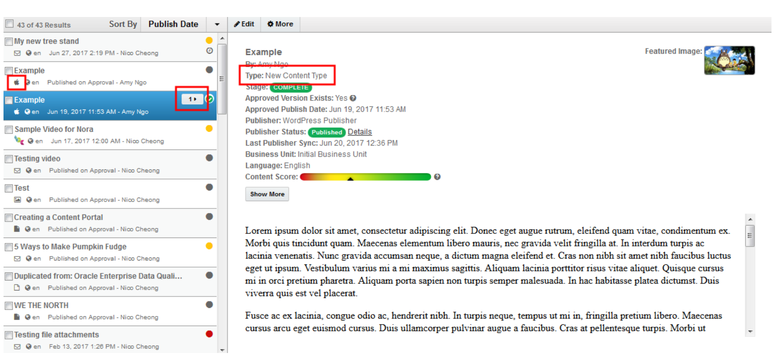
You are taken to the content editor to author a new content asset based on content populated from the original content asset.

Repurposed content in the content list

Content assets can be repurposed to be intended to be optimized for a specific channel.

Scanning the list

You might want to search for a content asset that has been repurposed for a specific channel. An expandable count is incremented on the content asset to indicate that there is more than one linked asset. Clicking the count will display all repurposed assets.



Note the different content type icons in the example. Setting up content type icons appropriate to your content assets will help you visually identify them in the content list.

16.5.3 Copying content to other Business Units

Organizations that have built up their library of content can better enable marketing teams to source and repurpose those approved assets for their own campaigns. Those customers that have more than one team working within Content Marketing using the Business Units functionality, have the option to copy one or multiple pieces of content to another Business Unit.

When copying assets to another Business Unit, users will be guided through a step-by-step wizard to review and customize data to ensure the content asset(s) are properly organized once they are copied.

The workflow generally consists of 4 steps:

1. Select the destination Business Unit for the content
2. (Optional) Choose to configure field settings in bulk
3. Review each asset and its corresponding fields
4. Copy the assets

The wizard will appear a little bit differently, depending on whether a user is copying a single asset or multiple assets. Additionally - When copying content, you can copy multiple content assets spanning multiple active Business Units into a single Business Unit.

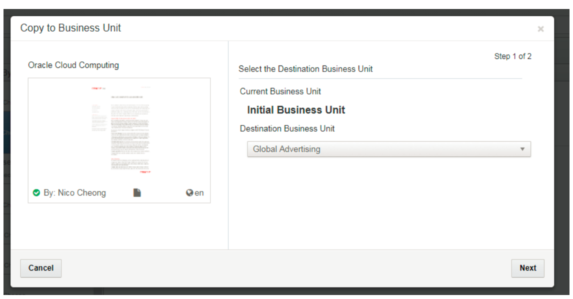
Prerequisites

- A user performing the copy must be assigned to more than one Business Unit. See Adding users for more information.

- A piece of content must have a matching content type in the destination Business Unit. For more information on how to share Content Types across Business Units, review the Content Types configuration documentation.
- A piece of content cannot still be an Idea.

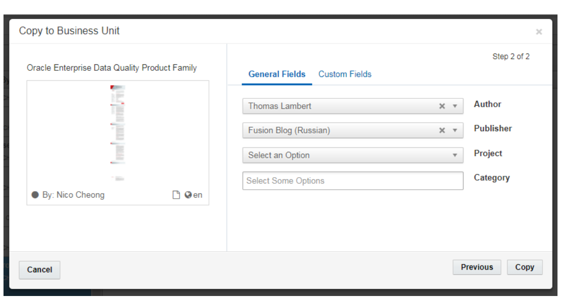
To copy a single content asset into a Business Unit:

1. In the Library, select a content asset.
2. Click **More** > **Copy to Business Unit**. A copy modal will appear.
3. Within the modal, click the drop down to select the destination Business Unit for the content, and click **Next**.

   The copy modal contains a summary of the asset. The summary displays a thumbnail of the asset, as well as the workflow status, author, content type, and language.

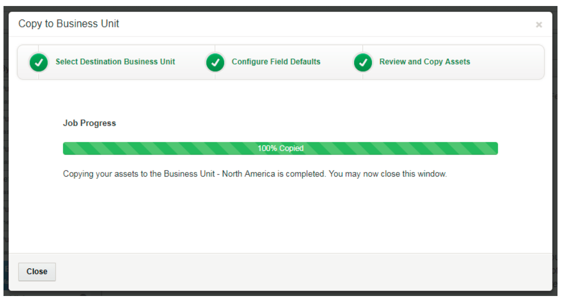
4. Click the drop downs to set the **General Field** and **Custom Field** default values for each of the fields. Under General Fields **Author** and **Publisher** are required and must contain a value. The fields that display in these two tabs will vary based on your license configuration.

> **Note**: Only Custom Field types configured to store a single or multiple predefined values will display in the **Custom Fields** tab. No other custom field types will display.

Click **Copy**.

A progress bar will display the progress of the copy. At any time you may navigate to another part of the app while you wait for your assets to be copied.

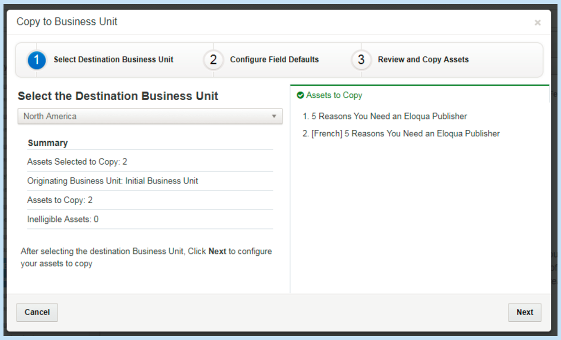


Users will receive notifications on their dashboard when their job to copy assets has completed. If there are any issues with the assets you have selected to copy, the notification will include guidance on what assets were and were not copied.

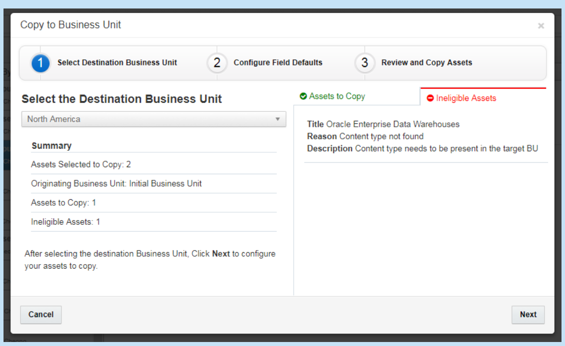
To copy multiple content assets into a Business Unit:

1. In the Library, select one or more content assets to copy.
2. Click **More** > **Copy to Business Unit**.
3. Click the drop down to select the destination Business Unit to copy the assets into. A summary of the assets to be copied will be displayed, including a count of assets that can and cannot be copied.

Example: We have selected two assets and both are eligible to be copied. The names of the assets that you have selected are displayed on the right side.

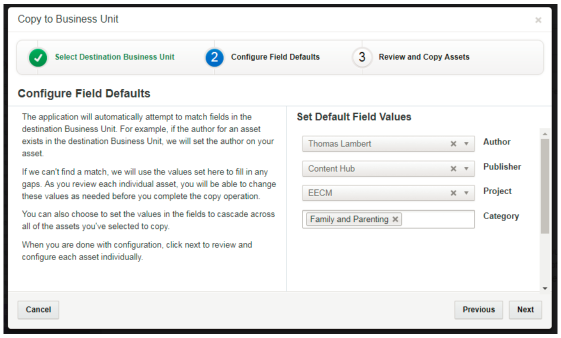


In this example, we have selected two assets, one is eligible to be copied and one is ineligible. View the *Ineligible Assets* tab to view the list of assets that will not copy, which includes some guidance on why they are ineligible.



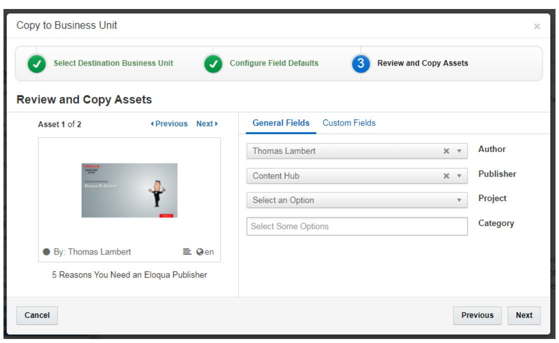
Review the information and click **Next**.

4. Click the drop downs to set the default values for the fields. **Author** and **Publisher** are required fields and must contain a value.



Click **Next**.

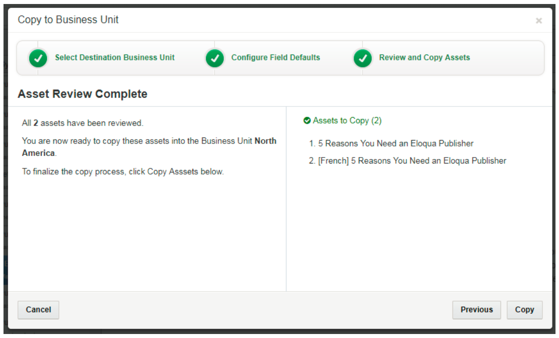
5. Now you will be able to review and customize the **General Field** and **Custom Field** values for each asset. The fields that display in these two tabs will vary based on your license configuration. Click the **Previous** and **Next** options above the asset preview to view and configure the values set for each asset.



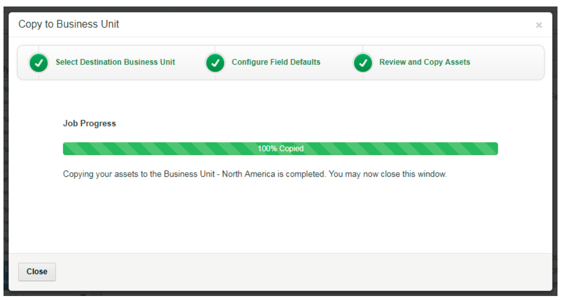
Note: Only Custom Field types configured to store a single or multiple predefined values will display in the **Custom Fields** tab. No other custom field types will display.

Once you are satisfied with all of your field configurations, click **Next**.

6. A summary will display of the assets to copy. Review the details and click **Copy**.



A progress bar will display the progress of job to copy your content. At any time you may navigate to another part of the app while you wait for your assets to be copied.



Users will receive notifications on their dashboard when their job to copy assets has completed. If there are any issues with the assets you have selected to copy, the notification will include guidance on what assets were and were not copied.

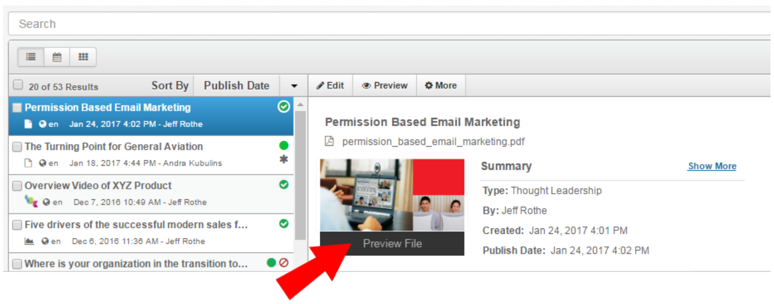
16.5.4 Previewing content assets

From the content repository, you have two content preview options:

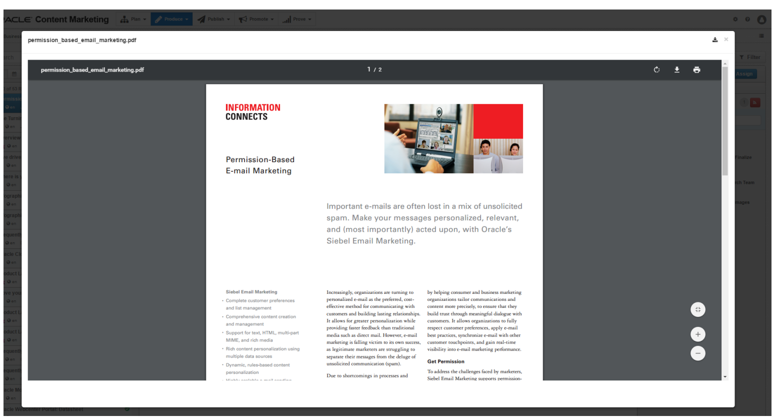
- Previewing uploaded files and documents from within the content repository.
- Previewing content as it would appear published in the selected publisher. See Publishers for more information.

To preview content:

1. Navigate to **Collaboration** > **Library**.
2. Select a content asset.
3. To see a preview of a single file upload, click **Preview File**. Note that the content asset must be of the File Upload content type to display this preview.



The file opens in a preview window and additional preview features are available.

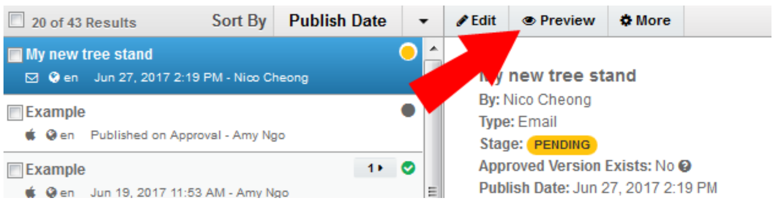


Preview Features

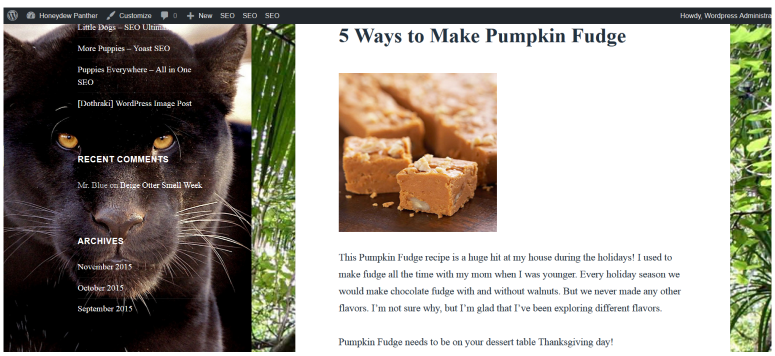
- **Previous / Next Page**: Moves to the corresponding document page in the preview.
- **Rotate left / right**: Rotates the preview 90 degrees.
- **Fit page to window**: Adjusts the zoom to fit the page length to the preview window.

- **Fit page to window width**: Adjusts the zoom to fit the page width to the preview window.
- **Zoom to actual size**: Adjusts the zoom to 100 %.

4. To see a preview of the selected content asset displayed in the selected publisher, click **Preview**.



A preview of the content asset will be displayed in the selected publisher.



16.5.5 Expiring content assets

You can set content to expire on a specific time and date, or on a relative date in the future. This functionality is used to automate the process of setting an end of life time frame on a single, or group of content assets. When content hits a set expiration date, it can automatically be removed from where the asset was published.

Common use cases include:

- Assets published on a CMS that are specific to a promotion or event that need to be taken offline by a specific date.

- Assets stored within Content Marketing that are made available for teams outside of marketing to distribute, are clearly marked as expired within the repository.
- Assets published on a content hub that have been created for an annual study, or to promote a piece of research, can have a relative date set to take those assets offline, so that marketing communications can refresh the content within the asset for the next year.

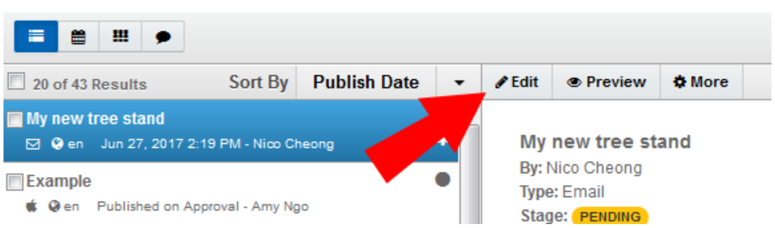
Note: This feature must be enabled by an Administrator in the License Configuration menu.

Prerequisites

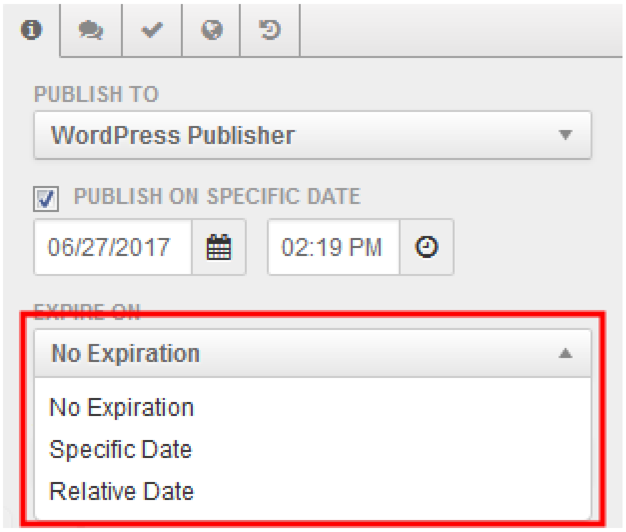
- The **Unpublish Content** right is required. See Managing user rights for more information.

To set content to expire:

1. Navigate to **Collaboration** > **Library**.
2. Select a content asset and click **Edit**.



3. In the *Content Settings* tab, click **Expire On**.
4. Select a content expiration option:

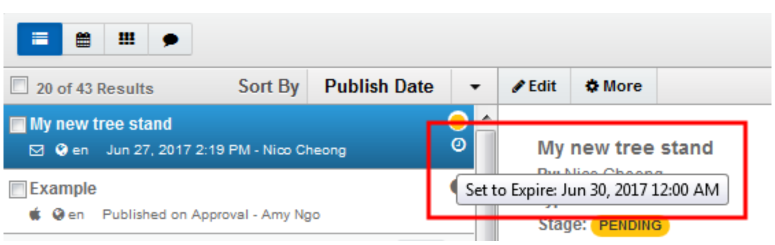


- **No Expiration**: Content will not expire. By default, assets are not set to expire.
- **Specific Date**: Content expires on a specific date. Set a time and date for content to be expired.
- **Relative Date**: Content expires on a relative date. Set an amount of days or months for content to expire.

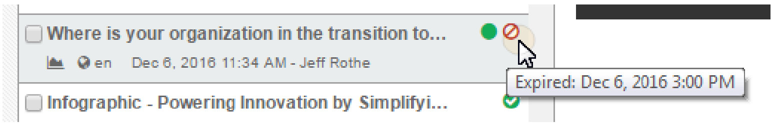
5. Click **Save Content**.

The content asset is now set to expire. In the content repository, users will be able to see which assets are expired, or set to expire.

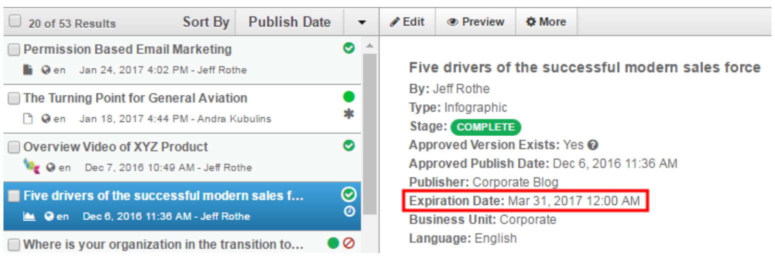
In the content list, assets set to expire are indicated by a clock icon. Hovering over the icon will display the date the asset is set to expire.



Assets that have already expired will display a red icon.



When selecting a content asset from the content list, the preview pane will display metadata for an asset. Included in this metadata is information about the expiration date.

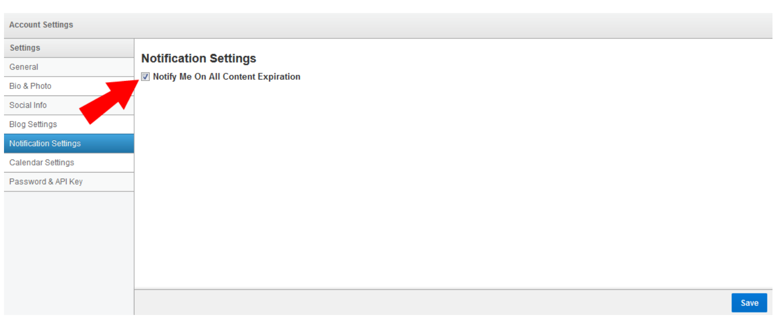


Expiring asset notifications

You can select whether or not you want to be notified of all expiring content assets.

To change this setting:

1. Click **Profile** and select **Notification Settings**.
2. Select 'Notify Me On All Content Expiration' to receive notifications about expiring content. Leave it unselected to continue not receiving expiration notifications.



16.5.6 Managing expired content assets

Expired content assets can be unexpired to be repurposed. There are two common workflows:

- Revising an asset, and then when revisions are complete, unexpiring the asset.
- Unexpiring an asset and then making revisions.

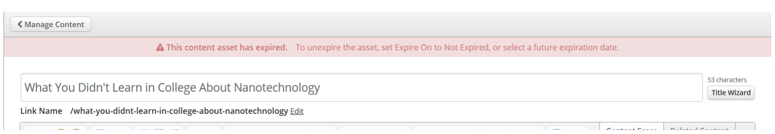
In both use cases, users will unexpire an asset and then republish. Let's look at how users unexpire assets.

Prerequisites

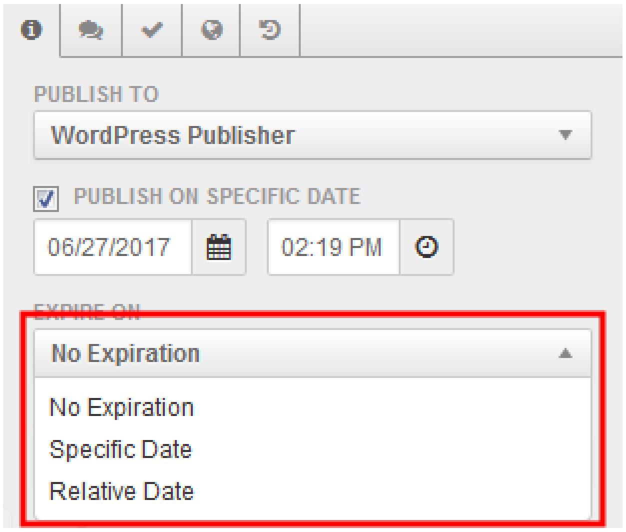
- The **Unpublish Content** right is required. See Managing user rights for more information.

To unexpire assets:

1. Navigate to **Collaboration** > **Library**.
2. Select an expired content asset and click **Edit**.
3. In the editor, a message is displayed indicating the asset has expired.



4. In the *Content Settings* tab, click **Expire On**.
5. Unexpire the asset either by selecting **No Expiration**, or selecting a future expiration date.



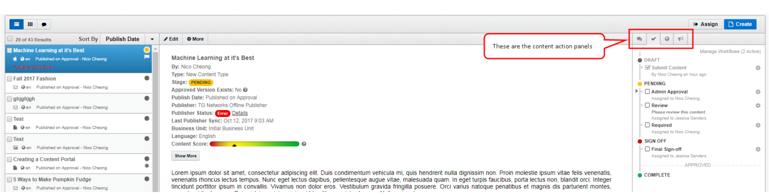
- **No Expiration**: Content will not expire. By default, assets are not set to expire.
- **Specific Date**: Content expires on a specific date. Set a time and date for content to be expired.
- **Relative Date**: Content expires on a relative date. Set an amount of days or months content will expire after.

6. Click **Save Content**.

The content asset was unexpired.

16.6 Using the content repository action panels

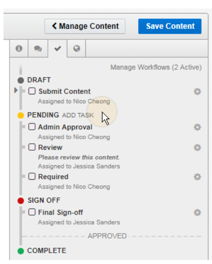
The content action panels within the content repository are used to perform various actions to help manage content.



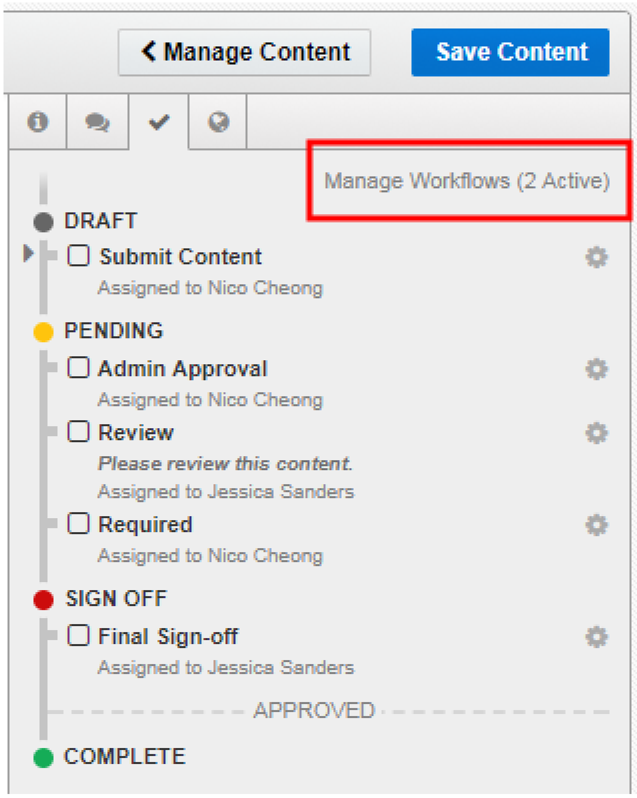
- Managing content workflow
- Promoting content
- Managing localized assets
- Content discussion subscriptions
- Adding inline comments
- Viewing content revision history

16.6.1 Managing content workflow

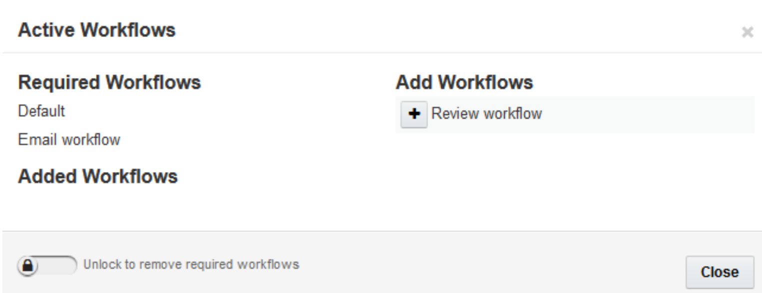
The workflow panel is used to see what has happened and what needs to happen on a particular content asset. Tasks can be edited and ad-hoc tasks can be created from this panel.



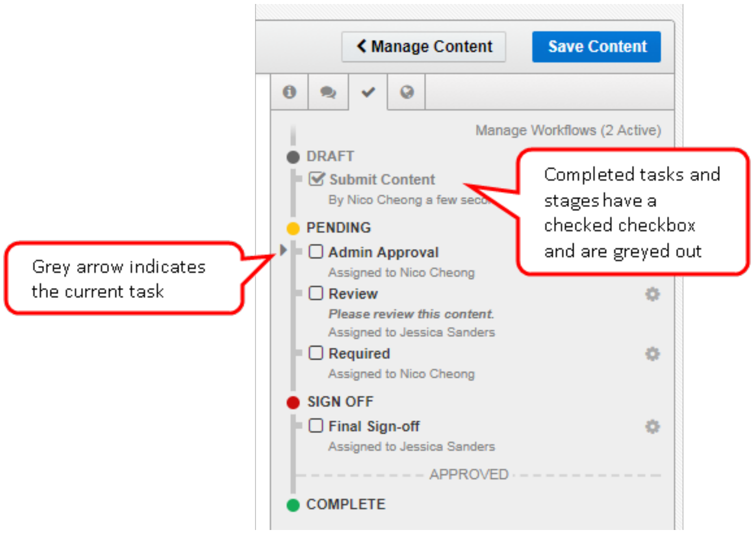
Workflows can also be removed or added through the *Manage Workflows* link if the user has the appropriate rights.



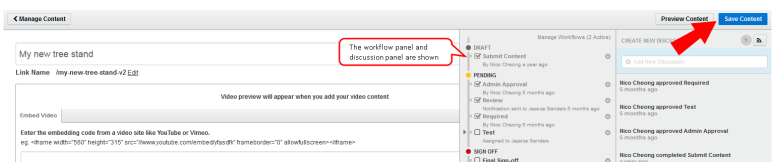
After clicking **Manage Workflows**, the Active Workflows window will be displayed. Users can add new workflows under *Add Workflows*, or remove workflows by clicking the *Unlock to remove workflows* icon. New workflows will display under **Added Workflows**.



The current task is indicated by a grey arrow and completed tasks and stages have a checked checkbox and are slightly greyed out.



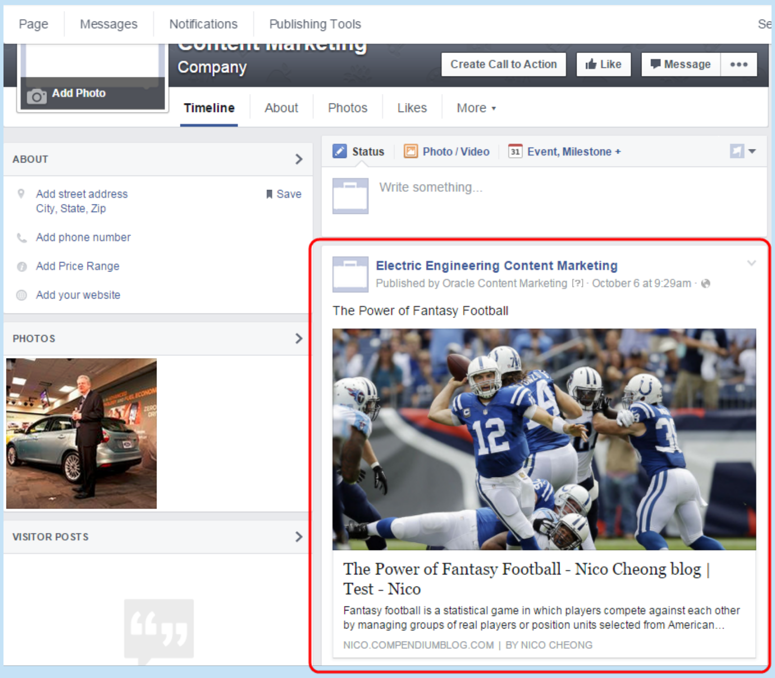
The workflow panel is available on both the *Manage Content* and *Edit Content* pages. On the *Edit Content* page, hovering over **Save Content** will display both the workflow panel and the discussion panel.



16.6.2 Promoting content via Oracle Content Marketing

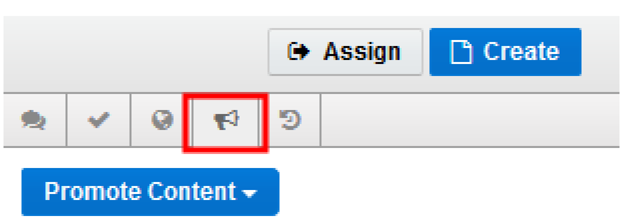
Promoting is the process Content Marketing uses to transfer content asset data to another application or platform. You can promote content to the out-of-the-box social channels within Oracle Content Marketing, or to a more complete set of social channels using Oracle Social Relationship Management, or GaggleAMP. When you promote content via Oracle Content Marketing, bit.ly is used to provide a shortened URL.

Example: Content assets promoted to Facebook display within the Facebook page:

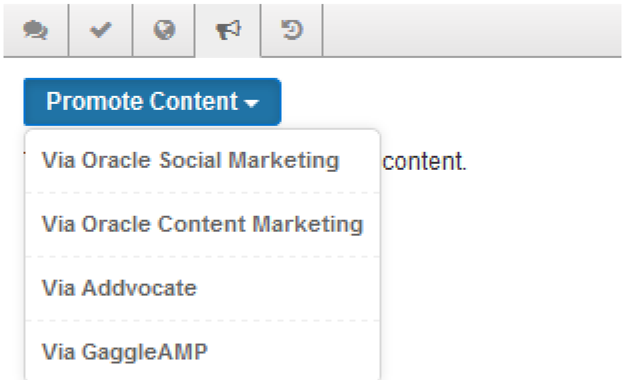


To promote content:

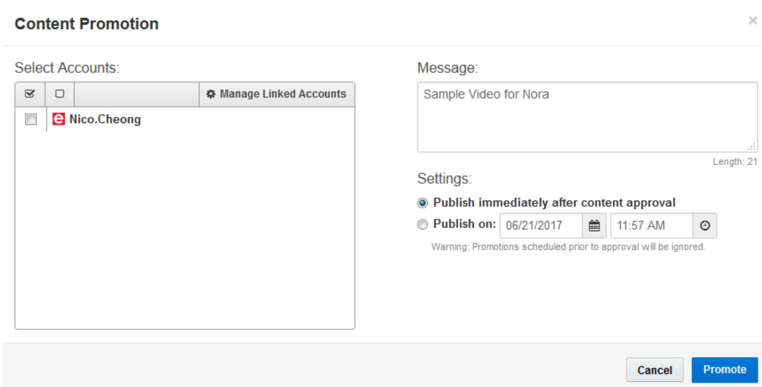
1. Navigate to **Collaboration** > **Library**, the content management page opens.
2. Select the content that you would like to promote, and select the *Promote* tab, signified by a megaphone icon.



3. Click the **Promote Content** drop-down list, then select **Via Oracle Content Marketing**, the *Content Promotion* window opens.



4. Complete the fields as appropriate.



- **Select Accounts**: Select the check box next to the accounts you want to promote across.
- **Manage Linked Accounts**: Click to manage your linked accounts. You can link new accounts or remove any existing accounts from this dialog.
- **Message**: Enter your promotion message. The content asset's title will be populated in the message field by default.
- **Publish immediately after content approval**: Select this option for the promotion to be published immediately once the content asset has been approved in workflow.
- **Publish on**: Select this option to promote the content asset on a specific date and time.

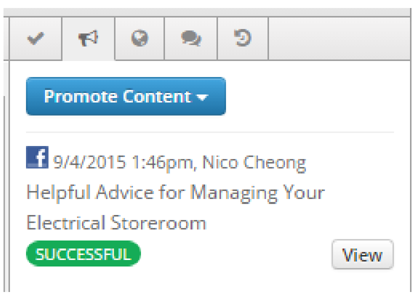
- **Promote to Facebook as an Image**: Select this option to promote an image from your content asset to Facebook.

5. Click **Promote**.

The asset was promoted, however, the asset may or may not be published to the linked account yet depending on the workflow stage of the content asset and promotion configuration:

- **Approved assets**

  When approved, and **Publish immediately after content approval** is selected, the promotion will be published immediately and you can manage the post from the respective social account. The promotion status will change to **Successful** once the promotion is live. Click **View** to view the promotion details.

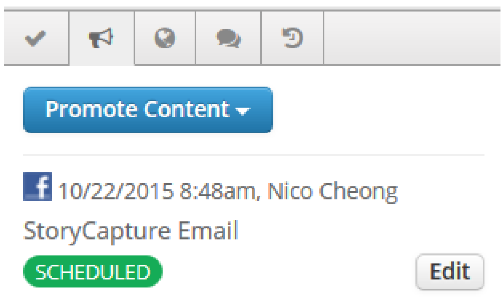
  

- **Assets pending approval**

  When an asset has not yet been approved, and **Publish immediately after content approval is selected**, the promotion status will display **Pending Post Publication** until the asset is approved. Click **Edit** to modify or cancel the promotion.

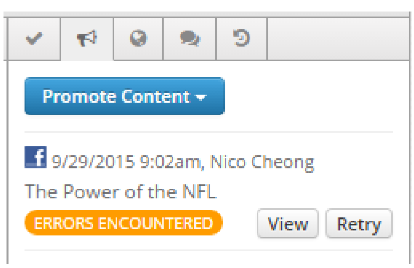
- **Scheduled assets**

  If scheduled for a future date, the promotion status will display **Scheduled** until the publish date. Click **Edit** to modify or cancel the promotion.



- **Failed promotions**

  In the event a promotion fails: an email will be sent to you, a **Retry** button will appear in the *Promote* panel, and the promotion status will change to **Errors Encountered**. Click **View** to learn more about the error, or click **Retry** to reattempt the promotion.



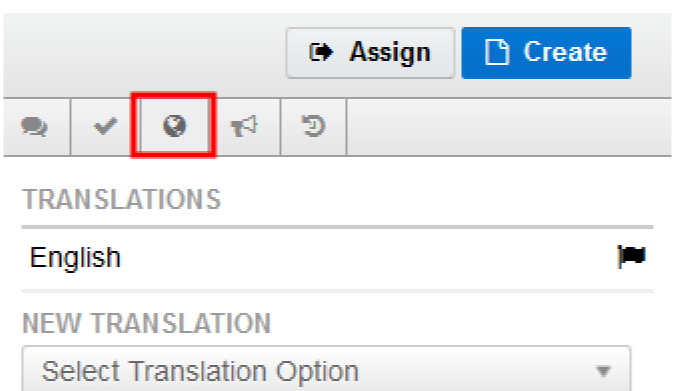
16.6.3 Managing localized assets

Content Marketing allows you to create and manage localized content assets. Assets that are created with the intention to be localized can be organized into collections. A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection of localized assets will include an original source, and one or more derivative translations of that source asset.

Note: A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection is created when content assets are either repurposed or translated into another language.

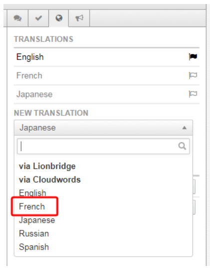
To create an asset translation:

1. Navigate to **Collaboration** > **Library**.
2. Select the content asset you want to translate and click the translation panel.



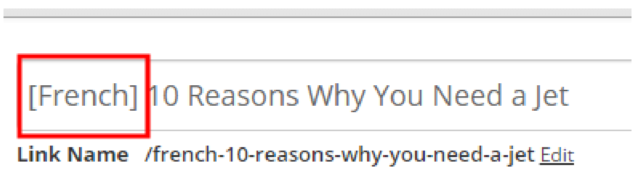
3. Click the **New Translation** drop down menu and select a language to translate the content

into. You can add Languages by navigating to **Settings** > **Content Languages**.

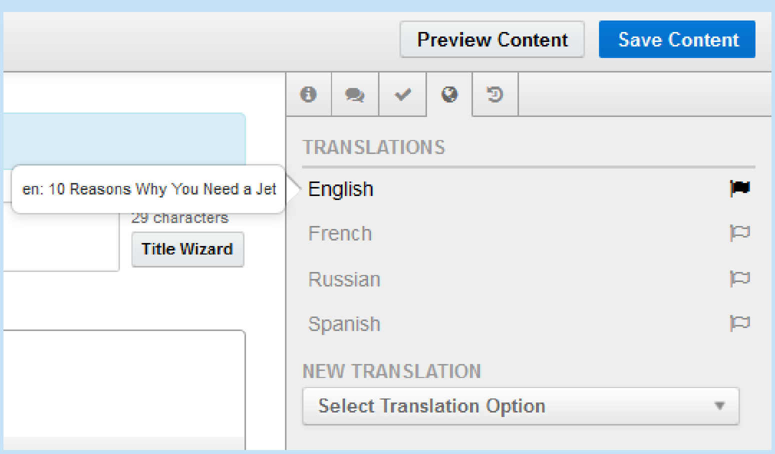


You have created an asset translation.

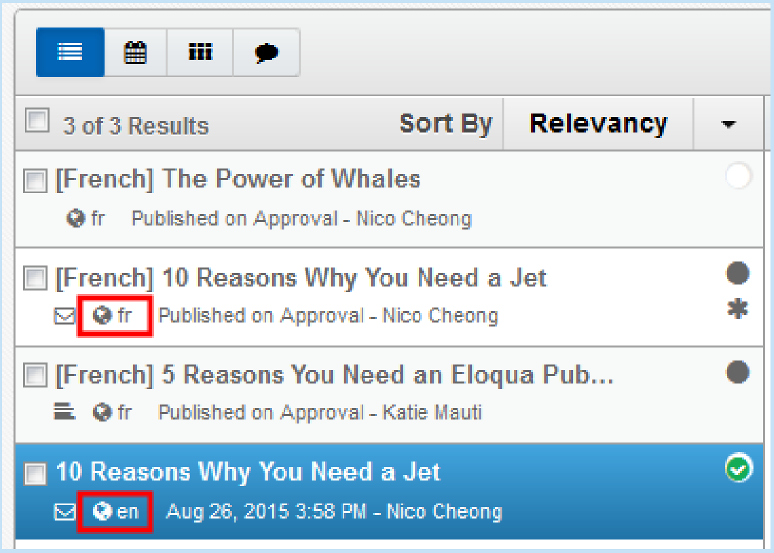
You will be redirected to the asset editor to create the localized asset. The language you have selected for the translation will be inserted into the title field for the content asset.



Tip: While in the editor, you can also click the label for any other language to edit the asset available in that language.



Within a collection in the content list, reviewing the language code is one of the clearest ways to identify a content asset available in a specific language. The language code is displayed to the left of the asset's publish date.

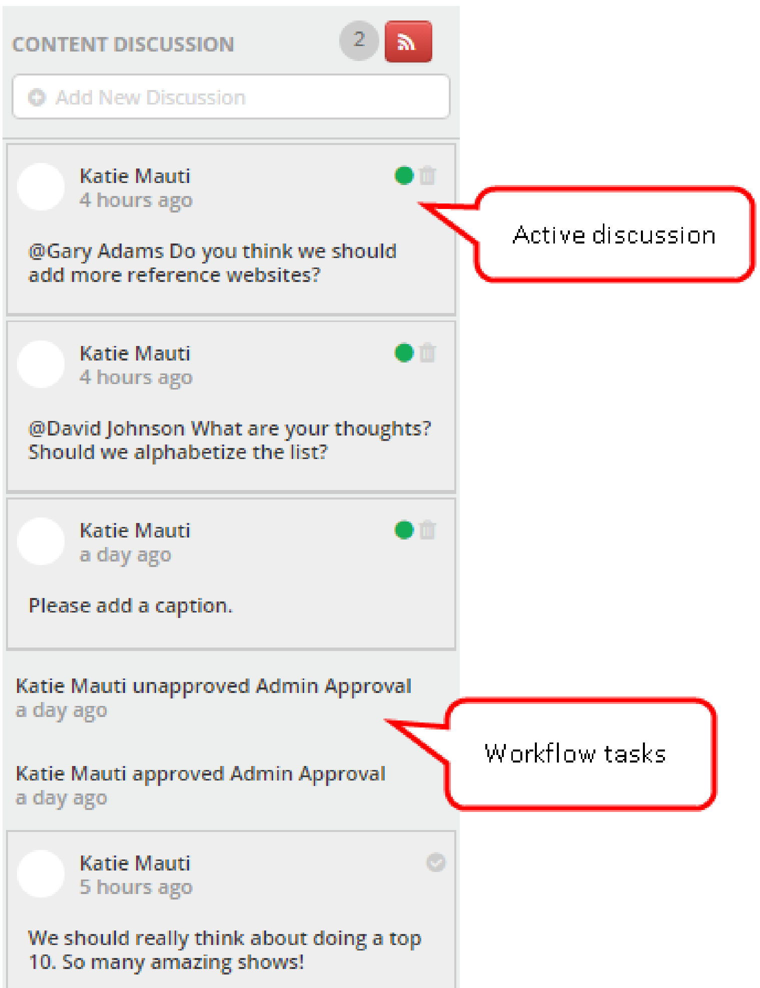


16.6.4 Creating content discussions

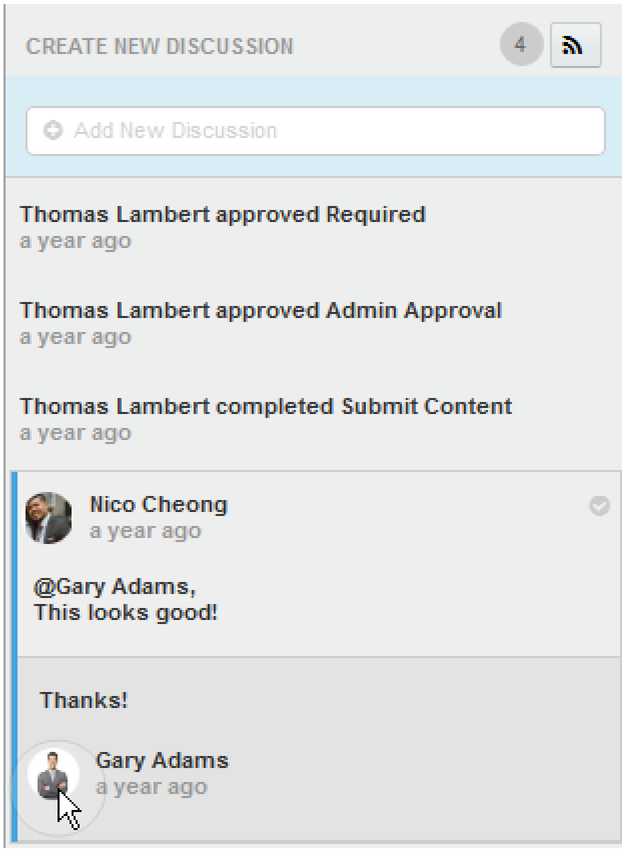
The *Content Discussion* panel allows users to collaborate on content assets. You can post discussions, reply to threads, mention other users, and see who and when other actions have been completed on an asset, like a completed workflow task, or the expiring of an asset.

Note: Content Marketing offers capabilities for Inline Commenting that help facilitate collaboration on content creation. For more information please see Adding Inline Comments.

Discussions with more than one reply, will display the most recent reply, and a number summarizing the additional replies that are available for that discussion. There are a number of visual cues to help users discover and navigate discussion threads. Discussions threads have a faint outline in gray to distinguish a discussion from other entries in this panel, like a completed workflow task. The original discussion comment is displayed in a lighter gray, and all successive replies are displayed with a darker gray background.

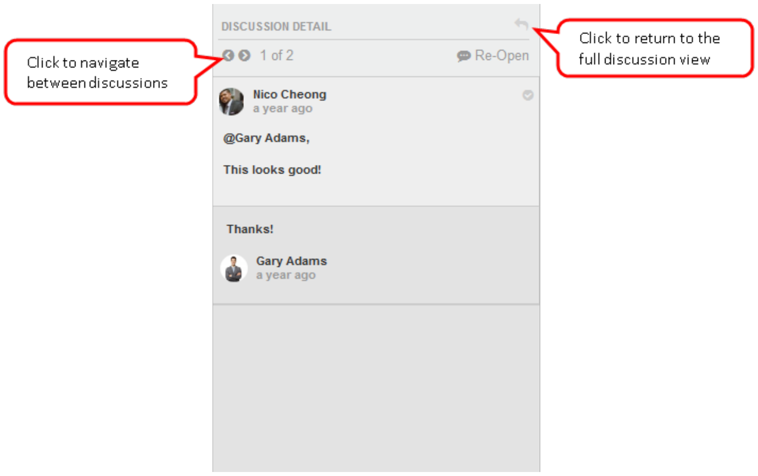


To add a new reply, the user will click a discussion to see the *Discussion Detail* view.

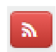


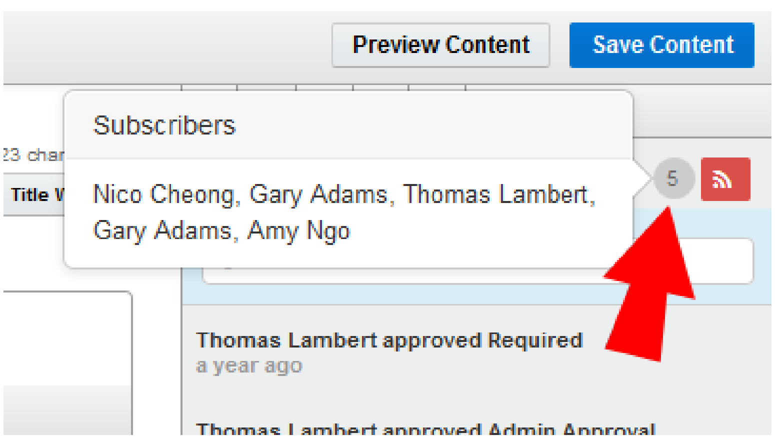
Here is an example of the Discussion Detail, with all of the replies for the original discussion. Users can navigate through all open discussions and inline comments using the left / right buttons at the top of the panel, or return to the full discussion view by clicking on the return icon in the upper right. Resolved discussions appear at the bottom of the Content Discussion panel.

When navigating with the left / right buttons, all active discussions are displayed first and closed discussions are displayed after the last active discussion. Active discussions are displayed in descending order by date of when the discussion was created. Resolved discussions are displayed in descending order by date of when the discussion was resolved.



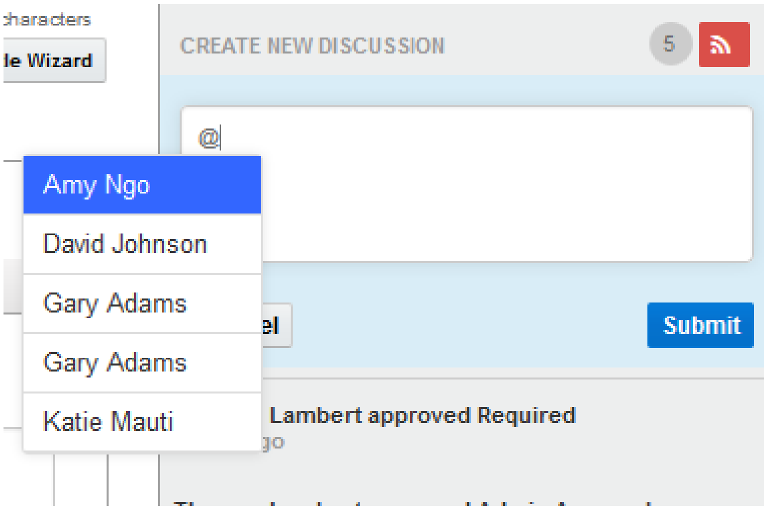
Notifications

Users can subscribe to a content discussion to receive email notifications on that discussion by clicking the **Subscribe** button . By default, the author is always subscribed to a content discussion. Click on the number next to the subscribe button to view a list of the users subscribed to the discussion.



Mentions

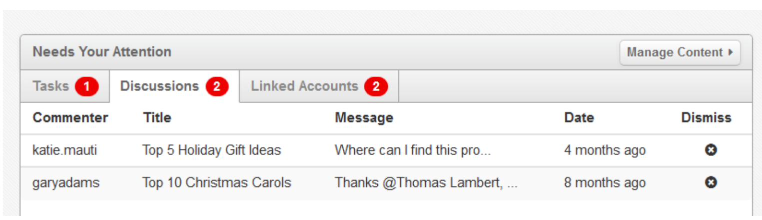
To send a notification to a specific user to make sure they review a comment, type the "@" symbol to be prompted with a list of users to mention.



When users are mentioned in a content discussion, they are notified in two ways:

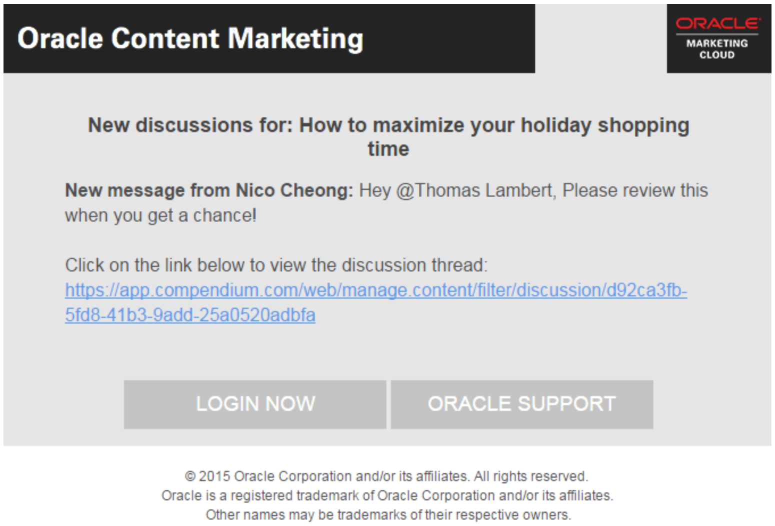
a. **Via the *Needs Your Attention* pane**

   The **Needs Your Attention** pane will display a discussion notification. If users click the notification, they will be sent to the content asset where they were mentioned.



b. **Via email**

The mentioned user will be notified via email about the content discussion.

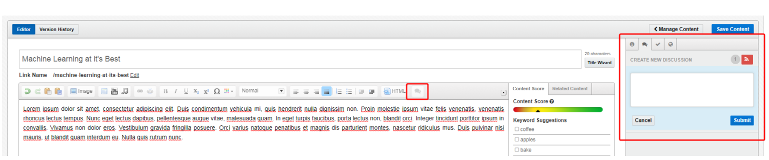


16.6.5 Adding inline comments

Inline comments can be added to content assets in order to facilitate communication regarding specific items and details within the content.

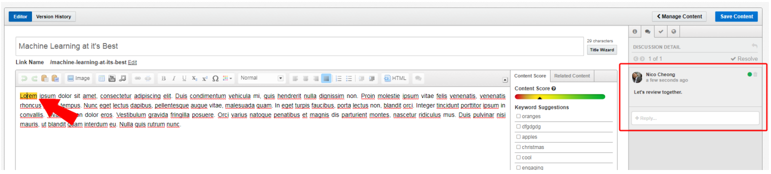
To add an inline comment:

1. Navigate to **Collaboration** > **Library**.
2. Select a content asset and click **Edit**.
3. In the Content Editor, highlight a region of text select an image.
4. Click on the **Insert Comment** icon . A text box appears in the *Content Discussion* panel:



5. Enter your comments and click **Submit**. You will be taken back to the *Content Discussion*

panel, where you will see your new comment.



You have added an inline comment. When the newly added comment thread is selected, the text containing the inline comment is highlighted. A user can select a discussion by either clicking in the panel, or clicking on the highlighted portion in the editor.

The user who creates the discussion will be subscribed to the thread automatically. Users who subscribe to this Content Discussion will receive an email indicating there is a new comment assigned to that content asset.

Tip: You can mention other users within a content discussion to get their attention about a specific comment. Those users will receive an email notification, with the included instructions.

17 Personas

Personas help authors keep track of the target audiences concerns and possible questions, it is a reference for them to keep in mind when creating content. You can create personas as needed to suit the specific needs of different content.

Learn more: For more information, sign up for the Oracle Content Marketing: Content Targeting course from the Oracle Marketing Cloud Academy.

17.1 Creating personas

As an administrator, you can create *Personas* to help authors target the intended audience at their specific stage in the buying cycle.

It is common that a marketing communications team has defined a set of broad personas that are used to guide the creation of marketing content. In the situation where multiple marketing teams are creating content within Content Marketing, persona information will be tailored to fit the specific needs of a local audience, product line, or channel.

To create a new persona:

1. Navigate to **Planning** > **Personas**, the Personas management screen opens.
2. If you have access to multiple business units, click the drop-down list and select the applicable Business Unit.
3. Click the **Add Persona** button, in the upper right-hand corner, the *Edit Persona* screen opens.

4. Select an image to represent the persona. This image will be used in a couple of places, including the content authoring screen to guide creators, and in the Dynamic Cloud Content App.
5. Add demographic and psychographic information for the persona under the *Attributes* tab.
6. Click **Funnel Stages** and enter questions or search phrases the persona would ask when considering your product.
7. Click **Save** at the bottom of the page to save the new persona.

17.2 Creating persona funnel stages

Creating a funnel stage for your Personas allows you to narrow down specific questions/terms that persona would ask/search for. There are 5 automatic funnel stages from which you can choose: Awareness, Consideration, Inquiry, Purchase, and Retention.

To add funnel stages to each persona:

1. Navigate to **Planning** > **Personas**, the Personas management screen opens.
2. Hover over the persona you would like to edit, then click the gear icon that appears, the **Edit Persona** page opens.
3. Select the *Funnel Stages* tab to view the funnel stages.
4. Add questions or search phrases that you think the persona would ask when considering your product.
5. Click **Save** at the bottom of the page to save your changes.

Note: You can also add your own custom funnel stages.On the Persona home page, click **Add Stage** (under the Stage column) then enter a name for the new stage and click **Save**.

17.3 Pairing personas to Eloqua segments

You can pair a persona to an Eloqua segment to associate your perceived target audiences with actual contacts in Eloqua. After you have paired a persona to an Eloqua segment, you can use the Dynamic Content app to:

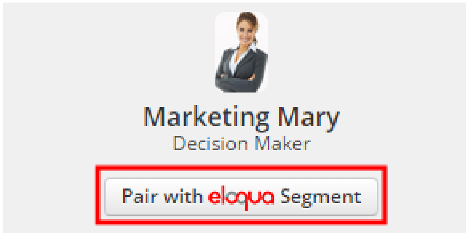
- Insert dynamic content from Content Marketing into Eloqua emails and landing pages
- Personalize dynamic content for a specific persona/segment by using filters
- Configure the dynamic content to display the most recently approved content asset

Prerequisites

- You must have an Eloqua Linked Account.

To pair a persona with an Eloqua segment:

1. Navigate to **Planning** > **Personas**.
2. Locate the persona you want to pair, and click **Pair with Eloqua Segment**.

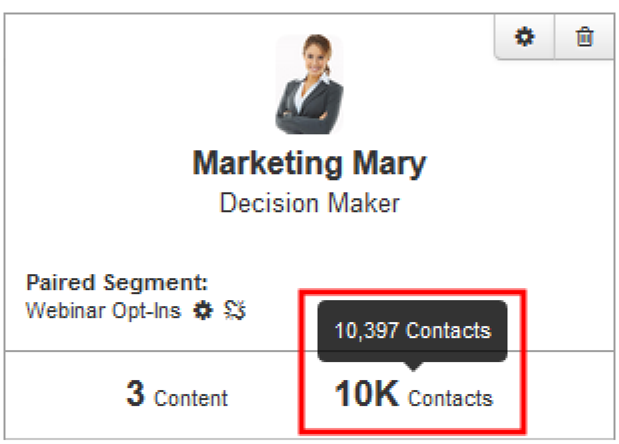


3. Select the appropriate Eloqua account to see the available segments if there are more than one linked Eloqua account.
4. Select an Eloqua segment to complete the mapping and click **Save**.

The persona is paired to the Eloqua segment. Within Eloqua, two fields are inserted to store data from Content Marketing in each contact record within the segment:

- Persona ID
- Persona Name

A summary of the amount of Eloqua contacts within the segment will display on the Persona record. Content Marketing will display the total number of contacts within a segment. For segments with 10,000 or more contacts, the number displayed will summarize the total number of contacts in the segment. For example, a segment with greater than 9,999 contacts, but less than 10,999 contacts, will display as a summarized number: 10K. On hover, the total contact count will display.



For contacts that are stored within more than one segment, Content Marketing will use the Persona ID & Name on the first segment that was mapped.

Note: It can take up to an hour for contacts from the Eloqua segment to display in Content Marketing.

You can now use the Dynamic Content app to add Content Marketing content assets to your Eloqua emails and landing pages.

18 Projects

Creating a Project is a great way to organize your posts that associate with a project, campaign, or promotion that you are running. When you are in the content management section, you can filter through Projects to look back on the posts that were associated with it.

Learn more: For more information, sign up for the Oracle Content Marketing: Content Production course from the Oracle Marketing Cloud Academy.

18.1 Creating projects

You can create a project to help organize the posts that relate to a specific campaign or promotion.

To create a project:

1. Navigate to **Collaboration** > **Projects**, then click **New Project** in the upper right-hand corner, the *Edit Project* window opens.
2. Enter the project details:
   - **Name**: Enter the name of the project.
   - **Description**: Enter a description of the project.

Tip: If you enter a URL, users will be able to click this URL when viewing the project from the calendar.

- **Start Date / End Date**: Select a start and end date for the project.
- **Color**: Select a color for the project. Adding colors makes it easier to distinguish projects.
- **Business Units**
  - **All Business Units**: Select to allow all Business Units to access this project.
  - **Specific Business Units Only**: Select to limit this project to specific Business Units. Select the Business Units this project will be applicable to.

Note: This option is only available in multi Business Unit licenses.

3. Click **Save Project**.

Note: A saved project can be edited at any time, simply select the project from the list, then click **Edit**.

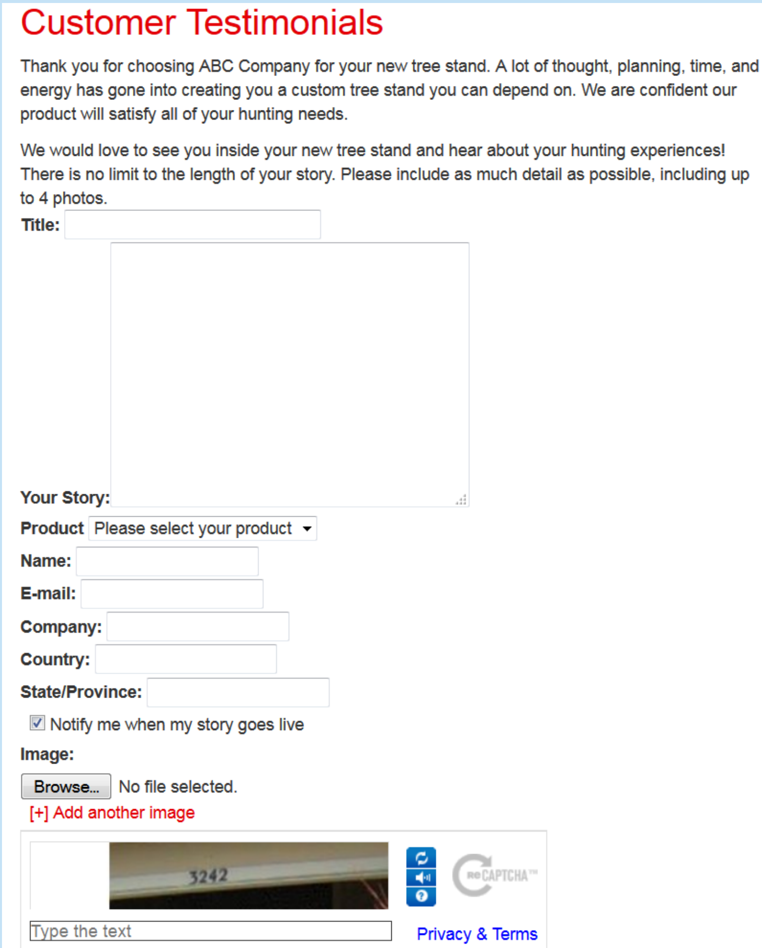
4. Optionally, you can add *Child* projects to add more specific details to the main project. Select the main project then click **Add Child**, the *Edit Project* window opens. Enter the details for the child project as needed.

19 StoryCapture

StoryCapture (formerly Web-to-Post) helps marketing teams empower their employees and engage their customers to contribute to their content production efforts. StoryCapture is a form that can be embedded on any website that allows an individual to author content and upload images that can be submitted directly into Oracle Content Marketing to be used in marketing communications.

StoryCapture can be utilized for many purposes including collecting success stories, great customer service experiences, contest entries, or other types of user-generated content.

Example: The following StoryCapture form was created to capture customer testimonials.


Customer Testimonials

Thank you for choosing ABC Company for your new tree stand. A lot of thought, planning, time, and energy has gone into creating you a custom tree stand you can depend on. We are confident our product will satisfy all of your hunting needs.

We would love to see you inside your new tree stand and hear about your hunting experiences! There is no limit to the length of your story. Please include as much detail as possible, including up to 4 photos.

Title:

Your Story:

Product Please select your product

Name:

E-mail:

Company:

Country:

State/Province:

Notify me when my story goes live

Image:

Browse... No file selected.

[+] Add another image

Type the text

Privacy & Terms

19.1 StoryCapture campaign workflow

A StoryCapture campaign follows a simple process:

1. Marketers configure and share their StoryCapture form.
2. Customers share their experiences.
3. An editor in Oracle Content Marketing reviews the story before it appears live.

19.2 Managing StoryCapture submissions

Before starting a StoryCapture campaign, marketers must decide how StoryCapture submissions will be managed within their license. There are several different scenarios to consider such as:

- Who is the user who manages the submissions? Is it one user or multiple?
- Will there be a generic account created in Content Marketing to manage submissions used by multiple users?
- Should marketing setup an alias on an email to notify more than one user tasked with editorial review?

Important: The Content Marketing account that will be used to manage StoryCapture submissions must be the user logged in when accessing the code used to configure StoryCapture.

After the StoryCapture submission workflow has been decided, you can configure StoryCapture.

19.3 Configuring StoryCapture

You can add a StoryCapture form into your website to capture the stories and experiences of your audience. The use cases for a StoryCapture form vary, but typically customers embed StoryCapture on a Content Marketing content hub, or embed the form directly into a page on their CMS.

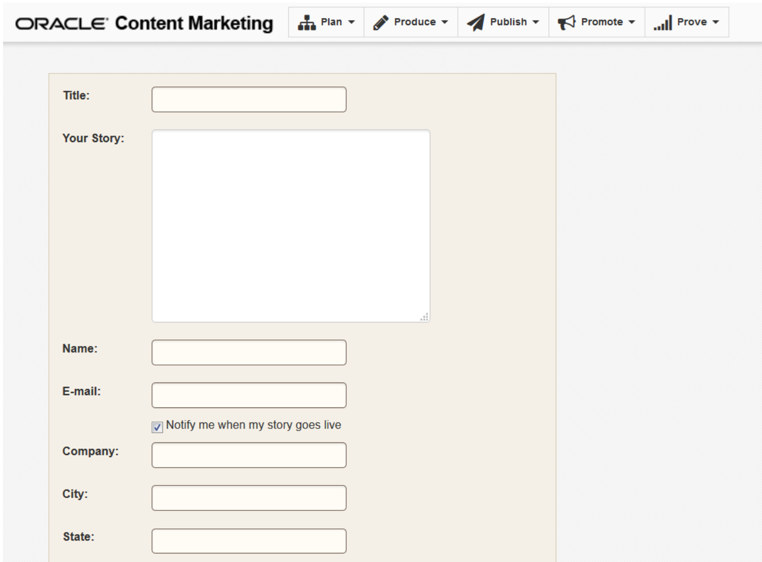
Note: Each custom field and their associated values that have been configured are included as options within the base StoryCapture form HTML. This provides two options for configuring StoryCapture form fields.

a. Plan and create your StoryCapture form fields first by creating a custom field for each StoryCapture form field. While configuring your StoryCapture form, remove any custom fields you do not want in the form.

b. Design the form fields you want to capture on your website first. Create custom fields and map each custom field to a StoryCapture form field. Remove any custom fields you do not want in the form.

To setup a StoryCapture form in your website:

1. Navigate to https://app.compendium.com/app/posts/webtopost.
2. Login with your Oracle Content Marketing credentials for the user responsible for managing StoryCapture responses. See Managing StoryCapture submissions for more information.
3. The default StoryCapture form template is displayed.



4. At the bottom of the page is a text area that contains the HTML for the StoryCapture form. Copy the StoryCapture HTML to your clipboard or a place where you can view all of the HTML.

5. Customize the styling of your form by editing the HTML according to your needs. All custom

fields in your Content Marketing license will be included.

> **Important**: Do not modify the HTML that has been highlighted below. These are keys that are specific to the user accessing the form and should not be changed.

The form only accepts submissions of image file types at this time. The File Type custom field that will prompt the user to choose a file on their local machine will only allow image file type submissions.

Omit the fields you do not want to appear on your StoryCapture form. Let's take a look at what is happening in the code.

```
<div id='form_container'>
       <link rel="stylesheet" type="text/css"
href="https://app.compendium.com/css/w2p.css">
       <form id="cb_web_to_post"
action="https://app.compendium.com/app/posts/webtopost"
method="post" enctype="multipart/form-data">

<!-- The BlogKey directs the form to which user blog the pending
StoryCapture submission needs to be created for. This key is
user specific. -->

               <input name="BlogKey"
value="NW3wZzDK8/rm6epFQJVhvSCkvEMjzlbauVvzMvtDceqpRMwBkW2T8kMII
Y2AMva22WMBeCp4WDwBS0baaGBEFA==" type="hidden">
<!-- The PublisherKey represents the publisher the user in
Content Marketing is posting to. -->
```

```
                <input name="PublisherKey"
value="m5U4fNmmFOuUyhN+MJx0YmI1YrTWYciCur5aCk1d55bnvnJ9K6e0j0bVE
8TEYx6Bl0ZVVbYsqddtdu8XHlowMQ==" type="hidden">

<!-- The BusinessUnitKey is the Business Unit the user is
assigned to. -->

                <input name="BusinessUnitKey"
value="2vW6UXMB6BQtVZC5nc0ykhYL611WSV2pBYWdYq0PzK2lb82abah8BK1RU
kWju1ROsV+UNJf5gkn0ni2iXOGq7g==" type="hidden">

<!-- This is the Return URL. This link will be opened after a
StoryCapture submission is submitted. You can update this link
to provide a "Thank you" landing page URL. -->

                <input name="RetUrl" value="http://www.compendium.com/"
type="hidden">

<!-- The "Title" and "Your Story" fields must stay within the
form. You can customize the fields accordingly, but these fields
must be in your StoryCapture form for the form to work
correctly. -->

                <div class="form_item">
                        <label for="Title">Title: </label>
                        <input type="text" name="Title" id="Title" size="30"
value="">
                </div>
                <div class="form_item">
```

```
                        <label for="Body">Your Story: </label>
                        <textarea id="Body" name="Body" cols="100" rows="10"
style="width: 300px"></textarea>
                </div>

<!-- The form fields below can be modified. If you are mapping
custom fields to form fields, the "input id" from the form field
must match a custom field's "Field ID" and the "input name" must
match a "Field Label". -->

                <div class="form_item">
                <label for="Product">Product</label>
                        <select id="Product" name="Product" type="text" value
                                <option selected="selected" value="Please sel
product">Please select your product</option>
                                <option value="Tree Stand Mini">Tree Stand Mi
                                <option value="Tree Stand Regular">Tree Stand
Regular</option>
                                <option value="Tree Stand Deluxe">Tree Stand
                        </select>
                </div>
                <div id="form_item_name" class="form_item">
                <label for="DataField_Name">Name: </label>
                        <input id="DataField_Name" name="DataField[Name]" val
type="text">
                </div>
                <div class="form_item">
                        <label for="HiddenField_EmailAddress">E-mail: </label
                        <input id="HiddenField_EmailAddress" name="HiddenFiel
```

```
[EmailAddress]" value="" type="text">
                <div class="form_item">
                        <label for="DataField_Company">Company: </label>
                        <input value="" name="DataField[Company]" id="DataFie
Company" type="text">
                </div>
                <div class="form_item">
                        <label for="DataField_City">Country: </label>
                        <input value="" name="DataField[Country]" id="DataFie
Country" type="text">
                </div>
                <div class="form_item">
                        <label for="DataField_State">State/Province: </label>
                        <input value="" name="DataField[State]" id="DataFiel
type="text">
                </div>
                <div>
                        <label> </label>
                        <input name="Settings[Notify]" checked="checked" valu
type="checkbox"> Notify me when my story goes live</div>
                </div>
                <div id="image_fields">
                <div class="form_item">
                        <label for="UserFiles_0">Image: </label>
                        <input id="UserFiles" name="UserFiles[0]" type="file'
                </div>
                </div>

<!-- This is the code for the captcha. This can be moved around
```

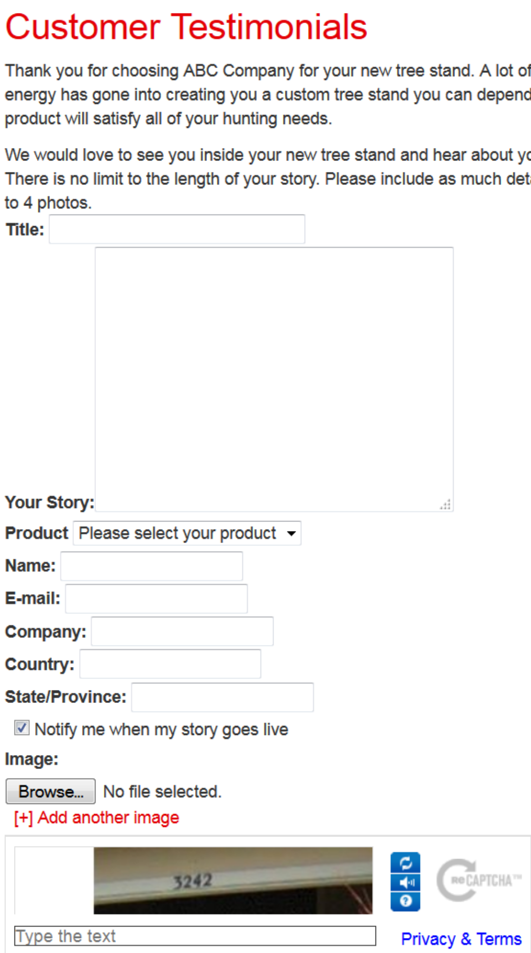
```
within the code and additional code can be added. -->

               <div class="form_item" id="add_another_image_link"></div>
               <div class="cb_captcha" id="cb_captcha"></div>
               <div class="form_item">

<!-- This is the Share button. Customize the label according to
your needs. -->

                       <button type="submit">Share your Story</button>
               </div>
               <script src="https://app.compendium.com/js/w2p.js"
type="text/javascript"></script>
       </form>
</div>
```

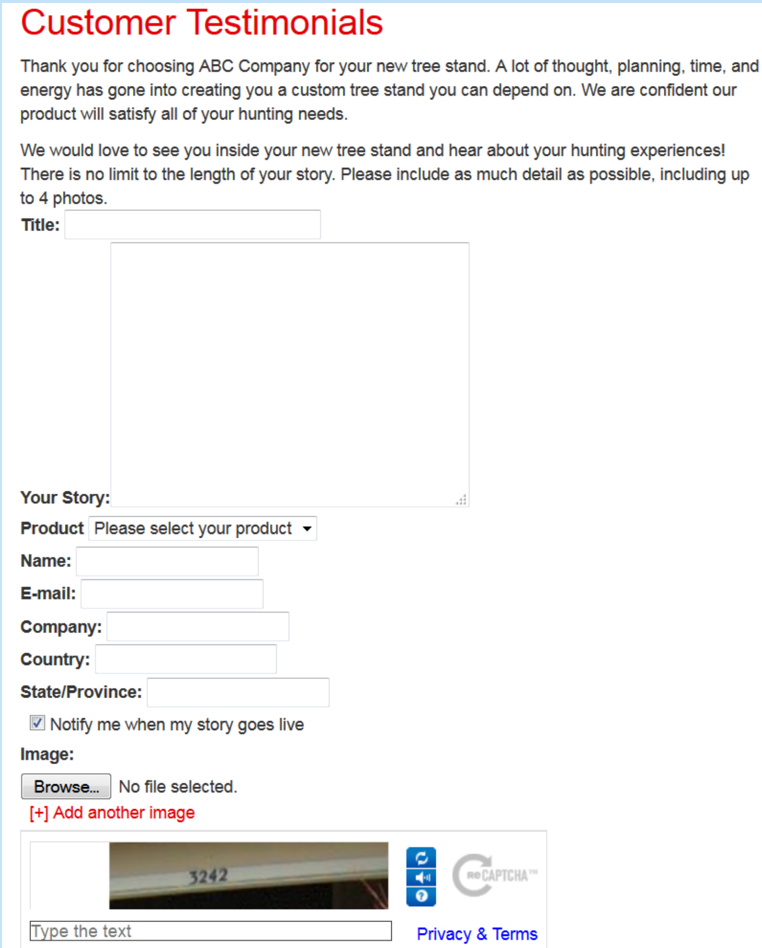
See the preview of this StoryCapture form:



6. Insert the code snippet into your site.

Your StoryCapture form was shared.

Example: The following StoryCapture form was created to capture customer testimonials.


Customer Testimonials

Thank you for choosing ABC Company for your new tree stand. A lot of thought, planning, time, and energy has gone into creating you a custom tree stand you can depend on. We are confident our product will satisfy all of your hunting needs.

We would love to see you inside your new tree stand and hear about your hunting experiences! There is no limit to the length of your story. Please include as much detail as possible, including up to 4 photos.

Title:

Your Story:

Product Please select your product

Name:

E-mail:

Company:

Country:

State/Province:

Notify me when my story goes live

Image:

Browse... No file selected.

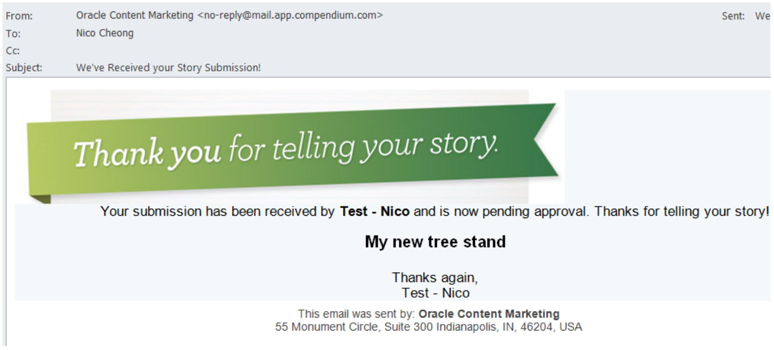
[+] Add another image

Type the text

Privacy & Terms

19.4 Customizing the StoryCapture email header

When users submit your StoryCapture form, an email is sent to them thanking them for their submission.

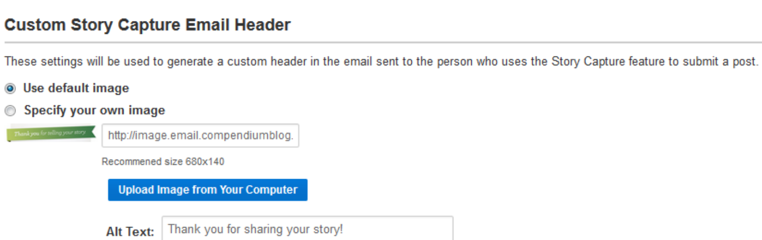


You can customize this email's header.

Note: This feature must be enabled by an Administrator in the License Configuration menu.

To customize the StoryCapture email header:

1. Navigate to **Settings** > **General Settings**.
2. In the **Custom StoryCapture Email Header** section, complete the settings as necessary:



- **Use default image**: Select to use the default image as the email header.
- **Specify your own image**: Select to use a custom image as the email header.
- **Upload Image from Your Computer**: Click to upload an image.

- **Alt Text**: Enter alternative text for the email header image.

3. Click **Save**.

All changes to the StoryCapture response email were saved.

20 Translation Management

Translation Management allows marketers to manage the process of creating and organizing localized content, directly connecting with Language Service Providers (LSPs) to translate content that can be automatically pulled back into Oracle Content Marketing.

Note: To enable this feature, please log in to My Oracle Support (http://support.oracle.com) and create a service request.

20.1 Configuring content languages

To properly configure your Content Languages, you will need to use the language codes that match your organization's workflow for authoring translated assets. The two most common approaches to configuring content languages are:

- Authoring and organizing translated assets using the language standard adopted within your organization
- Authoring and organizing translated assets using the language standard provided by a third-party Language Service Provider (LSPs).

If your organization already has a standard for language codes and you do not plan on using third-party LSPs to translate content, use your organization's standard when Adding Content Languages.

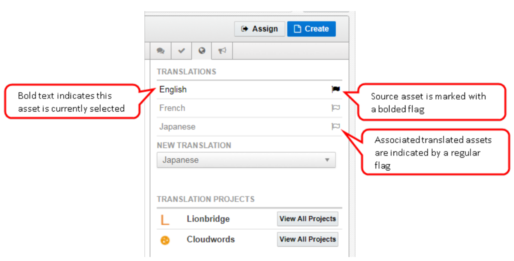
Configuring language codes for a third-party Language Service Provider

Users planning on using third-party LSPs to translate content must configure content languages to use the selected translation provider's supported language codes. See your translation provider's language code list below.

- Cloudwords

20.2 Using the translation panel

The translation panel helps users to manage localized assets. At the top of the translation panel, a collection of translated assets will display (if there are any created) - the source asset for the collection appears at the top, and all translated versions of that asset will appear below. The source asset will be marked with a bold flag, and any associated translations will display a regular flag. The label for a selected content asset will display with bolded text.



Creating new translations

The **New Translation** section provides the user two options for creating a translated asset matching the two most common workflows for creating translated content:

a. Internal experts will create the translation(s) for a piece of content

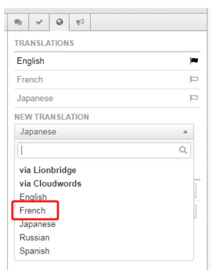
b. Third party Language Service Providers will create the translation(s) for a piece of content

Prerequisites

The user must have the 'Create Content' right to create new translations.

To create the translation(s) for a piece of content:

1. Click the drop-down and select a content language to create localized content assets intended for translation.



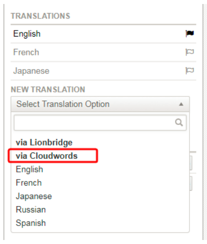
To use a third party language server provider to create translation(s) for a piece of content:

Prerequisites

The user performing this operation requires one of the following rights:

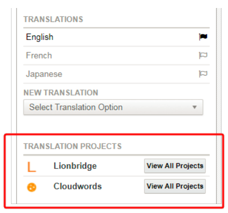
- Edit All Content (Admin)
- Edit Own Content (General User)

1. Click the drop-down and select a translation vendor to add the asset to an existing translation project or create a new translation project.



Managing translation projects

The **Translation Projects** section displays all integrated translation vendors and all translation projects that include the currently selected content asset.



20.3 Creating translation projects in Cloudwords

Create translation projects to send your content to Cloudwords to be translated.

Prerequisites

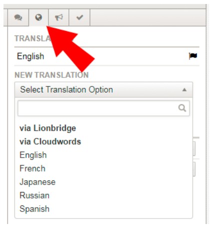
- A configured Cloudwords app.

To create a new translation project:

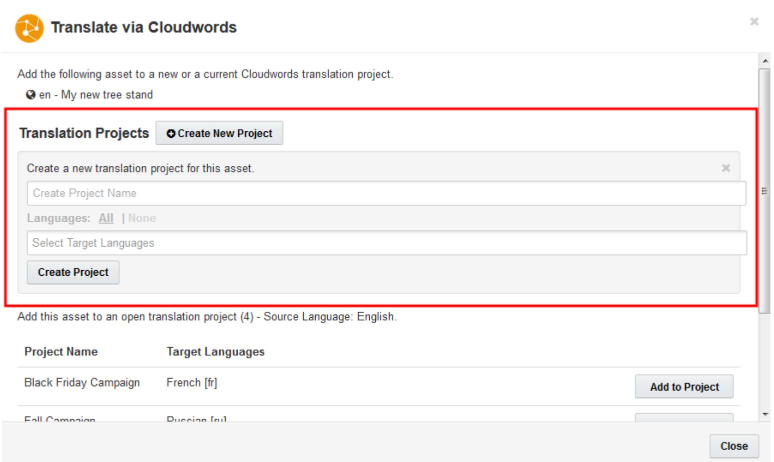
1. Navigate to **Collaboration** > **Library**.
2. In the Content List, select a content asset to send off for translation.

3. Click the **Translate Content** panel.

4. From within the panel under **New Translation**, **Select Translation Option** select **Via Cloudwords**. If you do not see this option, see Troubleshooting translation management.



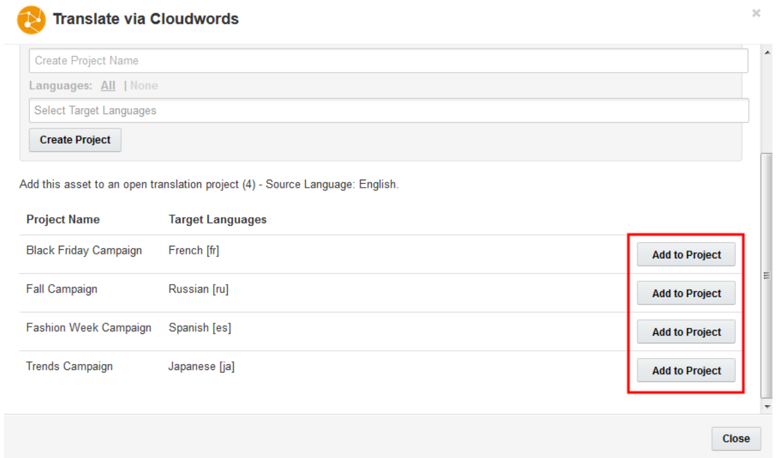
5. Click **Create New Project** and enter the project details.



- **Create Project Name**: Enter a name for the translation project.
- **Select Target Languages**: Select the content languages you want to translate the asset to. You have the option to select all or remove all defined languages added to a project. If you do not see the desired content language, see Adding Content Languages to learn more.

6. Click **Create Project**. Your project will now appear in the list below of all active Cloudwords projects.

7. Find the project you just created, and click **Add to Project** to add the content asset to the new translation project.

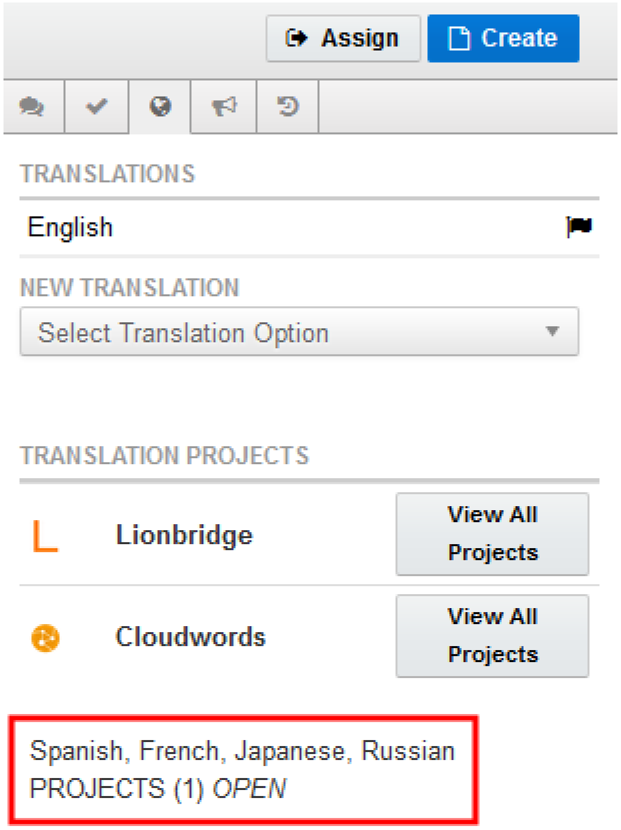


8. A message will appear confirming the save was successful. Once the save is complete, the asset is automatically sent to Cloudwords.

9. Click **Close**.

Now that the asset has been sent to Cloudwords, the user will manage the remainder of the project workflow from within Cloudwords.

You can verify the asset was sent to Cloudwords using the *Translate Content* panel. The *Translate Content* panel will display all active projects where the asset is included. Your newly created translation project will appear, with a status message of “OPEN”.



20.4 Supported language codes in Cloudwords

The following is a list of languages supported for content translation, and the respective language codes that should be used in configuring the Content Languages for your license.

Cloudwords supports the following languages for translation and their respective language codes.

Note: Language codes entered in Content Marketing are case sensitive.

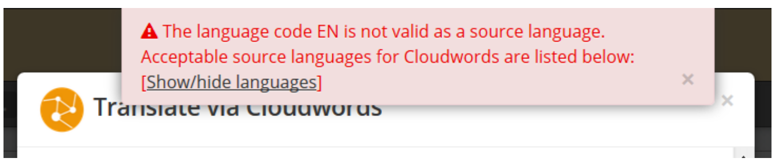
Language	Language Code
Arabic	ar
Bulgarian	bg
Czech	cs
Danish	da
German	de
Greek	el
English	en
English (UK)	en-gb
English (US)	en-us
Spanish	es
Spanish (Spain)	es-es
Spanish (Mexico)	es-mx
Estonian	et
Finnish	fi
French	fr
French (Canada)	fr-ca
French (France)	fr-fr
Hungarian	hu
Italian	it
Japanese	ja
Korean	ko
Lithuanian	lt
Latvian	lv
Dutch	nl
Norwegian	no
Polish	pl
Portuguese	pt
Portuguese (Brazil)	pt-br
Portuguese (Portugal)	pt-pt
Romanian (Romania)	ro
Russian (Russia)	ru
Swedish	sv
Thai	th
Turkish	tr
Chinese (Simplified)	zh-cn
Chinese (Traditional)	zh-tw

20.5 Troubleshooting translation management

If you are unable to successfully create your translation projects and/or translate content, see the following troubleshooting tips.

1. **Ensure language codes are correct**

   If your language codes do not match your Language Service Provider's list of supported language codes, you receive an error message informing you that your content languages were not configured correctly.

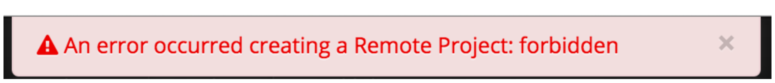
   - Verify your content languages are configured according to your translation provider's supported language codes.
     - Supported language codes in Cloudwords

2. **Ensure you have the appropriate rights**

   If the user sending the translation project to the translation provider does not have one of the following rights, they will be unable to complete the action:

   - Edit All Content (Admin)
   - Edit Own Content (General User)

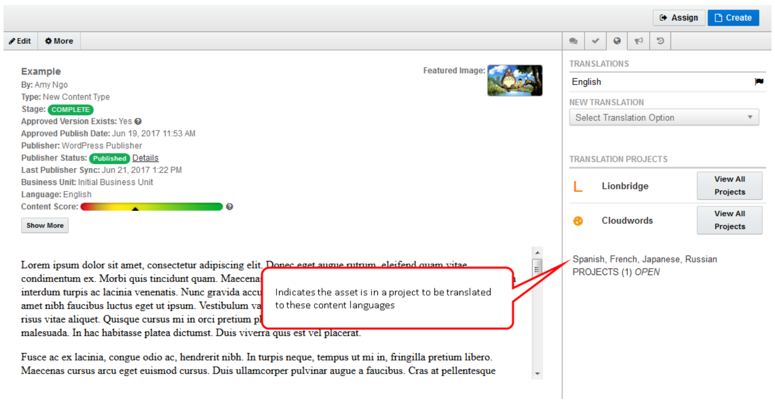
   Without the appropriate rights, users may receive error messages.

3. **(Cloudwords) Ensure Cloudwords projects contain assets**

If your assets were not added to your Cloudwords project, they will not be included in the translation.

With the asset selected in the content list, verify in the *Content Translation* tab if the asset is included in an open project and therefore set to be translated.



21 Workflows

While powerful, the content workflow system is also very simple. Content flows through a collection of tasks grouped into customizable stages. Multiple workflows can be combined on each content asset to create a list of tasks for that asset. The combination of stages, workflows, and tasks can handle almost any scenario.

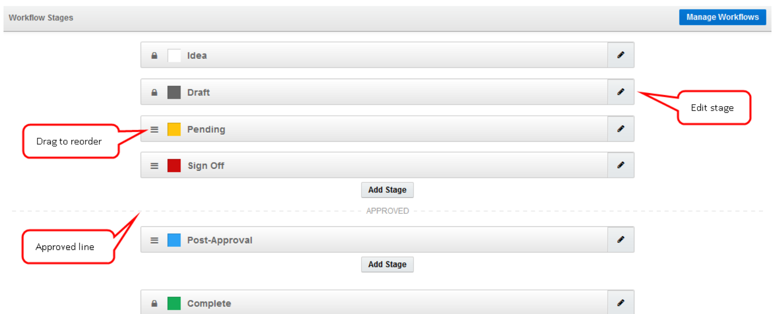
Example: Most blogging customers will have a Pending stage and a Default workflow with a Marketing Team Approval task. However, content being published on the corporate CMS might automatically trigger an additional Corporate CMS workflow which contains a Marketing VP Approval task. Content for the CMS would not exit the Pending stage until both the marketing team and the marketing VP have approved the content. Similarly, an infographic-specific workflow could be triggered for all infographics with a list of tasks that only apply to the creation of infographics via a design resource or other person in an organization.

Each time a content asset is edited, the workflow starts over from the beginning. Tasks can be required for every content edit, or they can be ignored in subsequent passes through the workflow.

What is a stage?

A *Workflow Stage* is a representation of the status of a content asset. Each stage has a name and a color, which is used throughout the application for easy recognition. The list of stages is global across an entire instance. The default stages are Idea > Draft > Pending > Complete, but this setup can be edited at any time.

There is an "Approved" line on the Manage Stages page and the Workflow Panel. When a content asset has completed all the tasks prior to this line, the asset will be considered approved, and in many cases, also be published live on the internet. New stages can be added both before and after the approved line. An example of a stage that would be useful after the approval line would be a "Notify Social Team" stage.



What is a task?

A *Workflow Task* is the action or event which is required in a particular stage of a workflow, there are several types of tasks: Basic Tasks, Validation Tasks, Approval Tasks, Notifications, and e-Signatures.

- *Basic tasks* must be completed before the workflow process continues. They can be assigned to any user, including pseudo users "Creator of Content" and "Author of Content". Each task can be required again if the content is ever edited, or the task can be ignored in subsequent workflow passes.
- *Validation tasks* check to ensure a field has been populated on an asset. Validation tasks can have other configuration options depending on the fields selection. Review Configuring Workflow Validation Tasks for more information.
- *Approval tasks* function just like basic tasks; however, by default, they require a higher permission level to mark them as completed for a user other than the task’s assignee (i.e, if Joe is the content author, he could complete the "Add Featured Image" basic task assigned to Sally, but he could not complete the "Marketing Approval" approval task assigned to Jennifer).

- *Notifications* trigger an email to each assignee and do not require any action on behalf of the assignee. They are perfect for sending messages like "Hi social team, this is ready to Tweet now" without holding up the rest of the workflow.
- *e-Signature* tasks are used to gather the equivalent of a digital signature on a content asset. E-signature task types follows the guidelines outlined by the FDA in the Title 21 CFR Part 11 regulation, which defines the criteria under which electronic records and electronic signatures are considered trustworthy, reliable, and equivalent to paper records.

Note: Tasks can be added and edited on the Manage Workflow screen, but they can also be added or edited on individual content assets. Tasks added on an individual content asset are called ad-hoc tasks and do not affect the overall workflow configuration, only that content asset. By default (this can be changed), any user can complete basic tasks and create ad-hoc tasks on a content asset.

Learn more: For more information, sign up for the Oracle Content Marketing: Workflow Management course from the Oracle Marketing Cloud Academy. And for a quick glimpse into the features and functionalities of workflows, check out this YouTube video.

21.1 Adding Workflows

Add a workflow to group tasks into a set of customizable stages. Each workflow can be defined separately, and layered on top of one another, to allow enterprise marketing teams the flexibility to account for each of the different derivations that may branch off of a base workflow.

To add a workflow:

1. Navigate to **Collaboration** > **Workflow**.
2. If you have access to multiple business units, click the drop-down list and select the applicable Business Unit.
3. Click **Add Workflow**.
4. Complete the fields as appropriate.
   - **Name**

     Enter a name for the workflow.
   - **Priority**

     Click the drop-down list to select a priority for the workflow. The priority defines how tasks from different workflows are merged together at the asset level. Tasks in the same stage from workflows with lower numbers will be merged before tasks with workflows from higher numbers (1-10 is the priority order).

     > **Example**: If a workflow containing a "Proofread" task in the editing stage has a 1 priority and another workflow containing a "SEO Audit" task in the editing stage has a 10 priority, the "Proofread" task will be placed first because its workflow has a lower priority number. By default, workflows are given a priority of 10. We recommend only changing the priority if the task order is important.

   - **Requirement Rules**

     Requirement rules define when a workflow is required. Workflows can be automatically required based on an asset’s content type, category, publisher, or author. A workflow can also be required for every content asset. Some workflows may be entirely optional and never required. User roles can be given the right to remove a required workflow.

- **Required for all content assets**

  Select for this workflow to be required for all content assets.

- **Select Content Types**

  Type or select a content type to use this workflow.

- **Select Publishers**

  Type or select a publisher to use this workflow.

- **Select Categories**

  Type or select a category to use this workflow.

- **Select Authors**

  Type or select an author to have access to this workflow.

- **Select Language**

  Type or select a Language for this workflow.

5. Click **Save**.

The workflow was added.

21.2 Configuring content workflows

The default workflow configuration is four stages: **Idea** > **Draft** > **Pending** > **Completed**. The Idea, Draft and Completed stages are special stages and cannot be moved, but their names and colors can be changed. For new customers, only one workflow will exist, the Default Workflow. It will contain only one task, an approval task assigned to the first administrator created. While the workflow system is extremely flexible, keeping the configuration as simple as possible is ideal.

See workflow frequently asked questions for more information about workflows.

To configure a workflow:

1. Navigate to **Collaboration** > **Workflow**, then click **Manage Stages** in the upper right-hand corner.
2. Click **Add Stage** to create the stages that will appear in the workflow. Assign a name and color then click **Save**. We recommend creating the fewest stages possible to clearly communicate asset status. Creating stages for each team, content type, or business unit will unnecessarily complicate the workflow process
3. Click **Manage Workflow** when you are finished creating stages, the *Workflows* screen opens.
4. Click **Add Workflow** to create a new workflow, the following is a list of recommended workflows:
   - **Default Workflow**: For simplicity, we recommend having a single workflow named "Default Workflow". This workflow should be marked as "Required for all content assets". For this workflow, add the tasks that are to be completed on every content asset. For most organizations, this is at least one or two layers of approval and often several basic tasks such as proofreading or SEO. Notifications to social and email marketing teams may be added to a post-approval stage.
   - **Required Workflows**: If there are tasks or approvals that should be required for particular users, categories, content types, or publishers, create separate workflows for these tasks. If there is content serving distinctly different purposes, this would also be a good time to consider the creation of those additional content types which can be used to automatically require workflows.
   - **Optional Workflows**: There may be sets of tasks or approvals that are not dependent upon any particular content attribute, but would be useful to add in certain scenarios. An example might be "blog posts that the IT team should fact-check". Important Note: By default, only administrative users have the ability to add and remove workflows on a content asset. Many organizations may wish to give their content producers the ability to add and remove optional workflows. Permission settings can be adjusted on the Rights & Roles page.
5. Test the workflows by submitting test content then adjusting the stages as needed.

6. Adjust workflow permissions. Navigate to **Settings** > **Rights & Roles**, then use the check boxes to adjust the permissions for each of the roles listed in the left-side menu. We recommend putting as much power as possible in the hands of content producers, trust people to do their jobs. Workflow is designed to simplify the content production process, not block the process. By default, the permissions are configured to be restrictive to users. Remember, the content history panel will list every change made to an asset, both content attributes and workflow status. Learn more about user roles and permissions.

21.3 Configuring Workflow Validation Tasks

On a daily basis, marketing users work with a variety of other users within their organizations who contribute to the content creation process. Those marketing users need to establish controls to ensure content is completed according to business process, while minimizing back and forth communication to ensure content is completed in a timely manner.

Workflow validation tasks help marketing users guide others to effectively contribute, whether that is to provide the correct supplemental content or to ensure that all fields for a content asset have been completed. Here are a couple sample use cases of how validations tasks may be used:

- Line of business has requested a campaign from the marketing team. The marketing team needs the line of business to contribute specific content at the beginning of the planning process to move the planning forward, such as a campaign outline attached as a PDF and specific images that will be used in the campaign.
- A marketing organization needs to route a screenshot of the final proofed piece of content to a compliance team. In order for that content to be considered 'approved', a reference ID from the compliance team must be included in a custom field on the asset.

Requirements

You have the ability to set both standard fields within the platform and custom fields as mandatory for completion in the workflow for a piece of content.

All of the Custom Field 'Field Types' are available to be set as required. These field types are:

- Textbox
- Large Textbox
- WYSIWYG Editor
- Single Selection Dropdown
- Multiple Selection Dropdown
- File Upload
- Checkbox

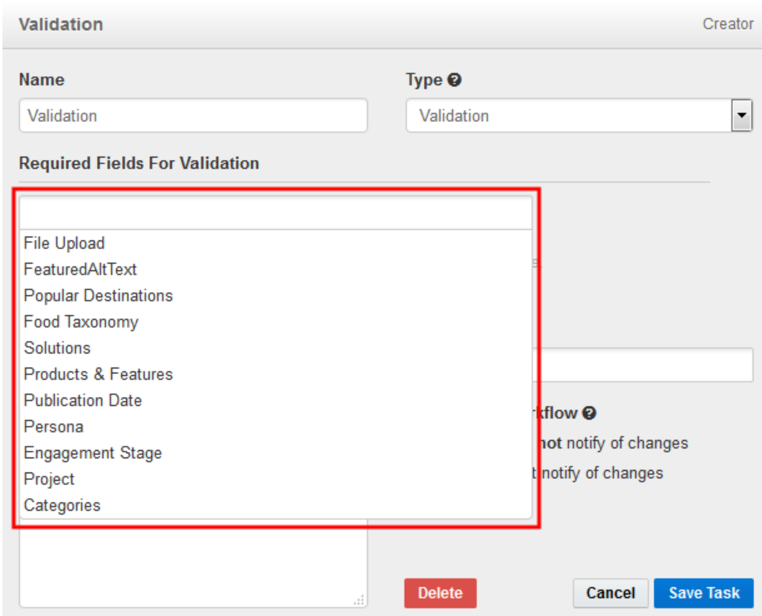
There are several standard fields that are used in the planning process that can be set as required. The labeling for these fields is consistent with their usage in the platform, those standard fields include:

- Persona
- Engagement Stage
- Project
- Categories

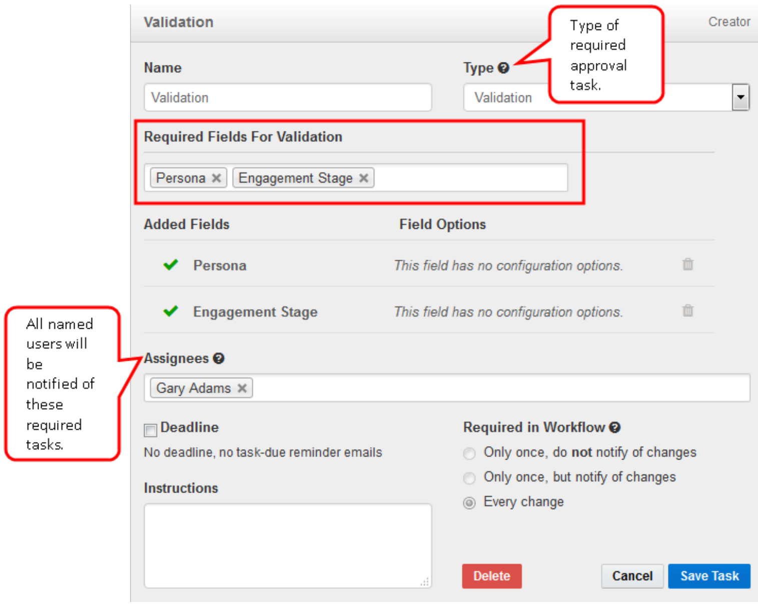
Adding required fields in workflows

To require specific fields to be populated, you will need to use the Validation task type option available within the workflow management screen.

After selecting the validation task type, you will see a search appear to find the fields you would like to require in workflow. Clicking in the search field will show a list of the fields available to be set in workflow. This list displays all Custom Fields available on top and any available standard fields below.



Each field selected will display under the Added Fields section with a green check mark indicating in order to confirm it is now a required field for validation. The Field Options will display with a message indicating whether or not there are additional configuration options available for that particular field.

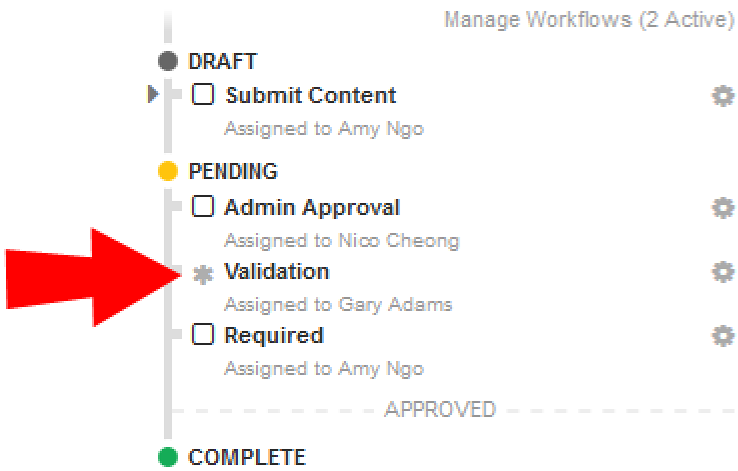


For custom fields that have a File Upload field type, the following field options will display:

- By default, a required Field Upload field will check to see if any file has been uploaded.
- Optional: Require users to upload file(s) of a specific type (i.e. photo as a .jpg)
  - Include the extension(s) of the files that should be restricted to be uploaded

Finish setting up your workflow task by selecting the appropriate assignee(s) that should ensure the fields are completed, configure other workflow options as appropriate (deadline, instructions and how the task is required in workflow) and select **Save Task**.

The new required validation tasks appear in the content asset workfow with a 'required' asterisk.



When an asset is saved, the application will check to see if the fields have been completed according to the requirements set in workflow. If the task has been completed correctly, the task will be checked off automatically. The user needs to focus only on completing the field; the task completion is automated. Relatedly, required tasks cannot be completed manually.

Best Practice Suggestion

How you configure validation tasks will depend on your business process for completing a content asset. Here are a couple of suggestions for things to consider:

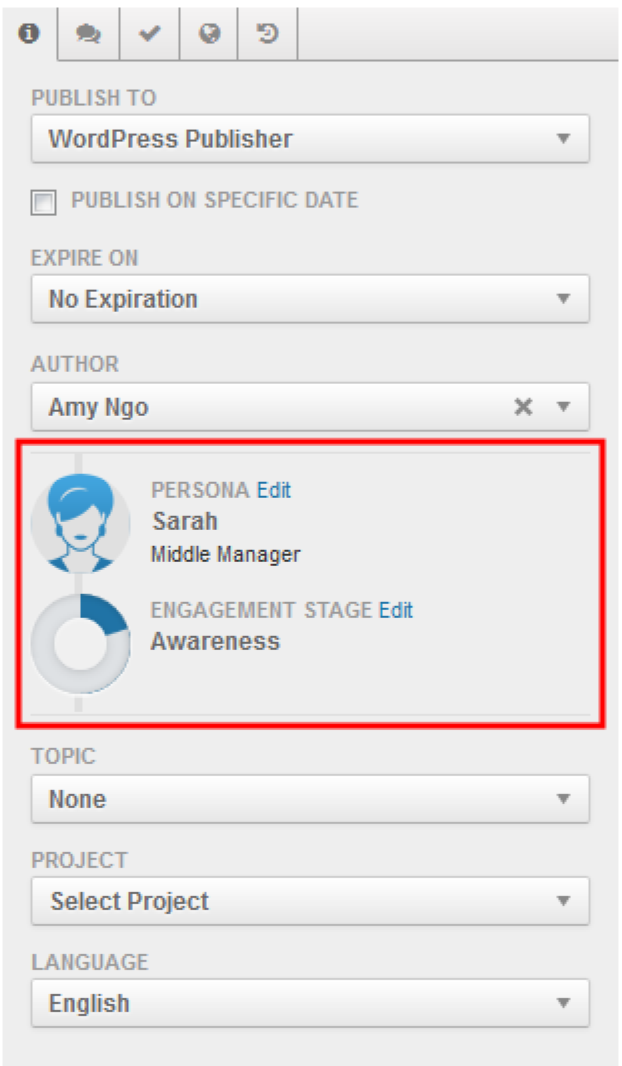
- Notifications are sent for each workflow task. If your content creation process allows for completion of all validation tasks as the last step in workflow, you may consider grouping all required fields into a 'Required Fields' workflow stage prior to the approval line in workflow. This would be a simple design for your workflow. and would send one notification for all tasks to be completed vs. one notification for each task.
- For organizations that need to complete a field before the asset can move to the next task, validation tasks should be configured to include one or a limited number of fields on a single task within each stage where a field is required to be completed.
- Where a user is required to complete a basic editorial task and populate a field as a final step before the asset should progress in workflow, attempt to place the basic task and validation

task together such that they can see those tasks displayed in the workflow panel and they will receive the validation notification immediately after they complete the editorial task.

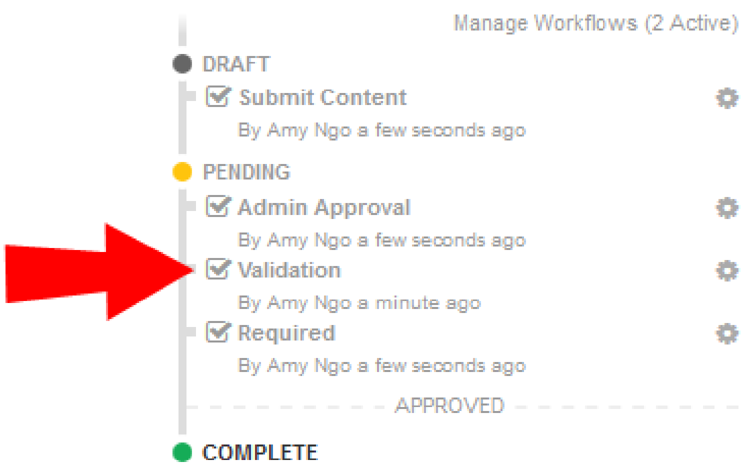
Example Flow for Completing a Validation Workflow Task

Let's look at an applied example of how a validation task would work.

In this example, we have required users to set a Persona on an asset before the asset can be approved. Here we see that the user is currently in the editor reviewing the asset and has set a Persona in the Content Settings pane, and will save their change.



There are no configuration options for Requiring a Persona on an asset, only that a value was set. The required workflow validation task will now display with a check mark to show it has been successfully completed.



Note: Any user who has the right to edit an asset and its associated fields could populate a field that would complete a required workflow task.

21.4 Using e-Signatures in Workflow

Organizations in industries governed by the US Food and Drug Administration (FDA) may need to implement additional controls when developing marketing content in electronic form. Organizations that make submissions to the FDA in electronic form must implement a set of controls to ensure the integrity of their records, one of those controls being electronic signatures. The e-Signature task follows guidelines outlined by the FDA in the Title 21 CFR Part 11 regulation, which defines the criteria under which electronic records and electronic signatures are considered trustworthy, reliable, and equivalent to paper records.

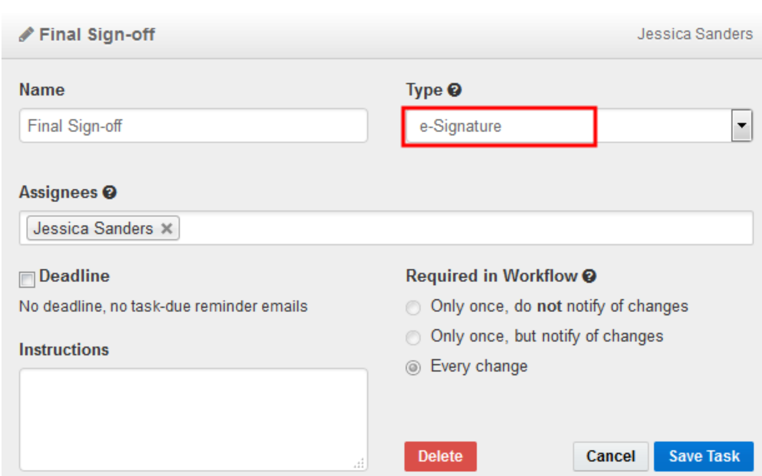
Adding e-Signatures as Required Tasks in a Workflow

Users can include e-Signatures as required tasks in a Workflow.

1. Select a workflow and click **Add New Task** and provide a name.
2. For the Type of Approval Task, select **e-Signature**.
3. Choose a Name for this task and an Assignee.
4. Click **Save Task**.

Note: Best practice for following FDA guidelines would be to configure a single assignee for an e-Signature task.

Every modification to a content asset is considered a new version, where a digital signature should be required before an asset can be considered re-approved. For that reason, the Required in Workflow rule is set to **Every Change** and cannot be customized.



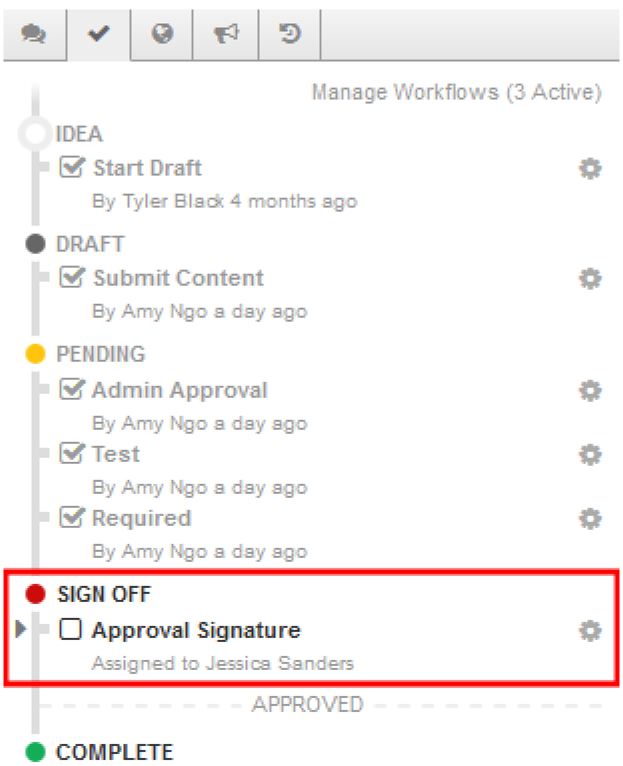
Best Practice

It is considered best practice to include the e-Signature task as the last task prior to approval. There are two options for this configuration:

Option 1 - In workflow configuration, create a stage that will contain only e-Signature task(s) that is the final stage before asset approval (recommended).

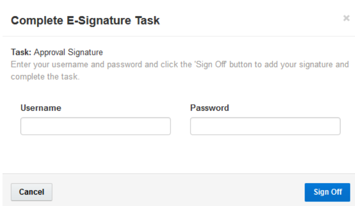
Option 2 - In workflow settings, configure the priority number on each workflow such that an e-Signature appears as the last task within a stage where multiple items are being composited.

Here is a screenshot showing an ideal implementation for e-Signature tasks, with a stage labeled *Sign Off* with a single e-Signature task.



Completing e-Signature Tasks

When a user attempts to complete an e-Signature task in workflow, they will receive a prompt to provide their credentials; both their username and password on first task completion in a session, and just the password for any successive task completion. An attempt includes whether a task is completed or uncompleted, in both scenarios the user will be prompted for their credentials.



Using e-Signatures with SSO Configured

Local users will be challenged for their local username/password when completing e-Signature tasks. When SSO is configured for a license, users will be challenged for their username, but the local password is not present and therefore cannot be validated. Users within the licenses setup to use SSO will need to create a secondary password that is used specifically for executing digital signatures to approve content in the form of e-Signature tasks.

Users assigned a role with the Manage e-Signature Tasks right enabled will have an additional setting in their profile settings menu to create this secondary password. Users expected to execute digital signatures will need to create a secondary password. Users expected to execute digital signatures will need to create this password as a final step before they can start completing e-Signature tasks.

22 Oracle Content Marketing Glossary

B

Best Practice

Best Practice suggestions are guidelines authors can follow to improve content creation.

Blog

A *blog*, also known as a "web log," is a website where entries are commonly displayed in reverse chronological order. "Blog" can also be used as a verb, meaning 'to maintain or add content to a blog.' Blogs can be private, or used to enhance the communication and culture for marketing, branding, and public relations for your business. The latter type of blog is also referred to as a "corporate blog." A blog post or blog entries are the individual content entries that make up the blog. A typical blog post combines text, images, and links.

Business Unit

Business Units functionality within Oracle Content Marketing allows marketers to create consistency in content planning and production across multiple teams, while maintaining separation of content assets, analytics, editorial plans, and other content data between those teams within your license.

C

CNAME

A *CNAME*, short for Canonical Name, record is an entry in the Domain Name System (DNS) that specifies where a author can find your web pages, or any other URL. You'll use this to associate your custom domain with your blog. A CNAME specifies that the domain name is an alias of another canonical domain name. With a CNAME record, multiple domain names to be pointed to another domain which can be managed over a single or in Oracle Content Marketing's case, several IP addresses/DNS servers.

Collection

A collection is a grouping of assets that can be individually optimized for a specific channel or distribution. A collection is created when content assets are either repurposed or translated into another language.

Compending

Compending is the proprietary process that Oracle Content Marketing uses to organize content. The software searches content assets and sorts each content asset based on the relevancy of the asset to the different category or topic-specific blogs. Compending allows readers to easily locate information on a specific topic. Compending also allows search engines to find, index, and rank your blogs before serving up relevant content to the searcher.

Content Languages

Content Languages in Oracle Content Marketing allows marketers to define a set of content languages that can be used to better organize their content assets. There are no limits to the number of languages that can be created to store in Content Marketing.

Content Type

Content types are an organizational tool used to structure your posts, they are the dominant factor in the post. For example, text, image, video, file, and so on.

Custom Field

Custom fields provide a method to associate metadata with your content assets that can make finding and working with content assets easier.

I

Indexing

Essentially, *indexing* is the process search engines take to acknowledge whether a website is a valid, credible site. This then begins the process of ranking for searcher results.

Search engine indexing collects, parses, and stores data to facilitate fast and accurate information retrieval. An alternate name for the process in the context of search engines designed to find web pages on the Internet is Web indexing. Popular engines focus on the full-text indexing of online, natural language documents. Media types such as video and audio and graphics are also searchable. The purpose of storing an index is to optimize speed and performance in finding relevant documents for a search query.

Oracle Content Marketing uses a sitemap on each client's network in order to help with indexing. Additionally, sitemaps help visitors and search engine bots to find pages on the site.

A sitemap index is an XML file that lists multiple XML sitemap files. The XML format of a Sitemap index file allows webmasters to include additional information about each XML sitemap (when it was last updated). After creation of a Sitemap index file, webmasters can notify search engines about the index file, and the other XML sitemaps that are included in the Sitemap index file will be automatically notified, too.

K

Keyword Suggestion

A Keyword Suggestion is a feature that recommends keywords to content authors during authoring.

M

Manual Categories

Manual categories allow Authors and Administrators to easily bucket content into specific categories. They are typically more generic, overarching terms that you want to use in organizing your network's blog content.

Example: If you want a "Current Events" category, you can add a "Current Events" manual category and select relevant content assets to appear on that blog page.

Manual categories differ from Oracle Content Marketing's standard automatic categories. Relevant content automatically compends to the appropriate automatic category pages, while content will only appear on a manual category page if an Author or Administrator selects it to appear there. A Network Administrator can utilize both types of categories to accomplish the goals of your blogging program.

P

Page Rank

Page Rank is a linking algorithm used by Google to measure importance of a web page relative to all other web pages in the network. The numerical rank value indicates the importance of a particular page. A hyperlink to a page counts as a vote of support, with the strength of the 'vote' depending on the other page's Page Rank. A page that is linked to by many pages with high Page Rank receives a high rank itself. If there are no links to a web page, there is no support for that page and it is likely to have a lower Page Rank. Pages that search engines feel are important are more likely to appear at the top of search results, thus, the higher rank your page has, the more likely it is to be at the top of search results.

Pinging

Pinging is the process of notifying search engines that new content has been published on a blog. This allows search engines to provide fresh results very quickly by pulling only newly-updated blogs. Similarly, aggregators, which pull content from your preferred sources, use results from ping servers to tell subscribers which items on their subscription lists have fresh material. As long as your blogs are regularly updated with fresh content, you will have increased efficiency with organic search results.

Oracle Content Marketing automatically pings the following sites every time a new content asset is approved:

- Bing
- Bloglines
- Blogs
- Google Blog Search
- Moreover
- NewsGator
- Weblogs.com
- Yahoo

Promoting

Promoting is the process Content Marketing uses to transfer content asset data to another application or platform.

Publisher

A Publisher is a service which provides a method of publishing and distributing content.

R

Redirect 301

A *301 redirect* occurs when a author types in an address to a website and is automatically redirected to another. This redirect happens server-side and is seamless to the end user. The 301 status code indicates that the web page has permanently moved to another place. The purpose of a 301 redirect is to ensure that authors get to the proper web page even if there was a typo in the address bar or a permanent change in the location they are trying to access.

A web page may be redirected for several reasons:

- A website might need to change its domain name
- An author might move his or her pages to a new domain
- Two websites need to merge

RSS

Really Simple Syndication (RSS) is used to publish frequently updated work - such as blog post entries. An RSS document includes full or summarized text. RSS benefits readers because it provides regular updates from favored websites or to aggregate feeds from many sites to one place.

RSS feeds can be read using software called an "RSS reader," "feed reader," or "aggregator," which can be web-based. The Author subscribes to a feed by entering the feed's URL into the reader or by clicking an RSS icon in a browser that initiates the subscription process. The RSS reader checks the User's subscribed feeds regularly for new work, downloads any updates that it finds, and provides an author interface to monitor and read the feeds.

An RSS feed is nothing more than a file on your web server that your readers' RSS aggregators check periodically for updates. You are not notified when they are checking for updates or how often they check for updates.

S

SaaS

Software as a Service (SaaS) is software that is deployed over the internet and hosted by a vendor or service provider; Oracle Content Marketing is a SaaS product in which the provider licenses the application to its customers. It is made available to customers who have an internet connection, as well as a username and password associated with the application that allows them to log in. Software as a Service is also referred to as an "on-demand service." Changes and upgrades made to the software apply to all clients. Content Marketing handles all software upgrades and updates, which eliminates the need for client-side maintenance and support.

Several advantages of Content Marketing being a Software as a Service include:

- Easy accessibility anywhere, anytime
- Scalability
- Security
- Reliability
- Application Programming Interface (API)
- Sticky content

SEO

Search Engine Optimization (SEO) is the process of improving the visibility, volume, and quality of search traffic to a website or blog through organic results. Organic search or natural search is the result in a search engine that is not a paid advertisement. The results that come up naturally are based on their *indexing within a search engine. Organic search results are beneficial to your company, and you should strive for high rankings in organic searches using optimized category phrases. Generally, the earlier and more frequently a site appears on the search engine results list, the more "visitors" it will receive from the search engine.

*Indexing - Getting indexed by the search engines simply means that they are aware that your posts exist. Oracle Content Marketing provides several tips to clients in order to help them get indexed as quickly as possible. Most of our clients see their blogs indexed within 30-60 days of creating their first post. The two most critical factors in getting indexed wtihin a similar timeframe are links and steady content creation.

Sticky content

Sticky content is typically used to share information about the author with readers or it can provide readers with the purpose of the company blog. Specific sticky content should be discussed with your Administrator. Authors usually set up sticky content during the initial setup of their account. They generally serve as a bio post to introduce an author and their blog. Often, it contains an image of the author to personalize the page for visitors.

Submitting

Submitting is the process of notifying search engines that your web page exists.Search engines need one of two things in order to make them aware of your web page:

- You can submit your main URL to be included in their index.
- Another site already in the search engine's index links back to your site and the bots follow the link to your site.

T

Taxonomies

Content Marketing's Taxonomies capabilities provide marketing teams greater flexibility for organizing content around taxonomy structures that can be mapped to other individual Content Management Systems or source of truth systems that manage taxonomies across a set of Customer Experience applications.

W

Workflow

A Workflow is a collections of tasks grouped by stage, a workflow could contain 20 tasks or just one. They can be automatically required based on an asset's content type, publisher, category, author or language. This allows for different workflows to be automatically applied for videos, content published on the CMS, content written by Joe Smith, and so on. At the asset level, multiple workflows are combined to create a single list of tasks.

Workflow stage

A *Workflow Stage* is a representation of the status of a content asset. Each stage has a name and a color, which is used throughout the application for easy recognition. The list of stages is global across an entire instance. The default stages are Idea > Draft > Pending > Complete, but this setup can be edited at any time.

Workflow task

A *Workflow Task* is the action or event which is required in a particular stage of a workflow, there are several types of tasks: Basic Tasks, Validation Tasks, Approval Tasks, Notifications, and e-Signatures.