# Studio User Manual

CoreMedia Content Cloud – v13

**Copyright** CoreMedia GmbH © 2026

CoreMedia GmbH

Altes Klöpperhaus, 5. OG

Rödingsmarkt 9

20459 Hamburg

**International**

All rights reserved. No part of this manual or the corresponding program may be reproduced or copied in any form (print, photocopy or other process) without the written permission of CoreMedia GmbH.

**Germany**

Alle Rechte vorbehalten. CoreMedia und weitere im Text erwähnte CoreMedia Produkte sowie die entsprechenden Logos sind Marken oder eingetragene Marken der CoreMedia GmbH in Deutschland. Alle anderen Namen von Produkten sind Marken der jeweiligen Firmen.

Das Handbuch bzw. Teile hiervon sowie die dazugehörigen Programme dürfen in keiner Weise (Druck, Fotokopie oder sonstige Verfahren) ohne schriftliche Genehmigung der CoreMedia GmbH reproduziert oder vervielfältigt werden. Unberührt hiervon bleiben die gesetzlich erlaubten Nutzungsarten nach dem UrhG.

**Licenses and Trademarks**

All trademarks acknowledged.
July 22, 2026 (Release 2512.1 )

1. Preface ..... 1
1.1. Audience ..... 2
1.2. About this Manual ..... 3
1.3. Typographic Conventions ..... 4
1.4. Change Record ..... 6
2. Basic Concepts ..... 7
2.1. Production and Live Environments ..... 9
2.2. Content Items and Folders ..... 11
2.3. Content and Site Model ..... 14
2.3.1. Simple Example Website Structure ..... 15
2.3.2. Structure of a Website ..... 16
2.3.3. Layout of a Website ..... 18
2.3.4. Business Content of a Website ..... 21
2.3.5. Grouped Content ..... 22
2.3.6. Active Content ..... 23
2.4. CoreMedia Studio User Interface ..... 25
2.4.1. Content App ..... 25
2.4.2. Workflow App ..... 47
2.4.3. Keyboard Shortcuts ..... 49
2.5. Permissions and Rights ..... 51
2.6. Versions ..... 54
2.7. Notifications ..... 55
2.8. Validators ..... 56
2.9. Workflows ..... 58
2.10. Multi-Site and Multi-Language ..... 61
2.11. Personalization ..... 64
2.12. Elastic Social ..... 65
2.13. Product Catalogs ..... 66
2.13.1. Local product catalog ..... 66
2.13.2. Commerce Integration ..... 66
2.14. Asset Management ..... 69
2.15. In-App Guide Portal ..... 70
3. Administration ..... 77
3.1. Studio Hardware Requirements ..... 78
3.2. Preparing the Browser ..... 79
3.2.1. Spell Checking ..... 79
3.2.2. Deactivating Pop-up Blocker in Firefox ..... 80
3.3. Changing Settings ..... 82
3.3.1. Changing your password ..... 82
3.3.2. Changing the language of the GUI ..... 83
3.3.3. Remove Site Chooser Button ..... 83
3.3.4. Configuring the Behavior of the Publish Button ..... 84
3.3.5. Enabling Colorful Content Type Representation in Studio ..... 85
3.3.6. Configure Preferred Types ..... 85
3.3.7. Disabling the Highlighting of Preview Content on Mouseover ..... 87
3.3.8. Configuring Scrollbars in the Device Preview ..... 87
3.3.9. Selecting a Preferred Site ..... 88

3.3.10. Configuring a Warning for Large Content Operations ..... 89
3.3.11. Configuring Available Comment Categories ..... 90
3.3.12. Configuring Workflow Validation ..... 91
3.3.13. Configuring Warnings ..... 96
3.3.14. Configuring *Elastic Social* ..... 96
3.3.15. Editing Mail Templates ..... 97
3.3.16. Defining Default Folders for Quick Create ..... 98
3.4. Getting Technical Information ..... 102
3.5. Managing Users and Groups ..... 103
3.5.1. Opening the User Manager ..... 103
3.5.2. Searching for Users and Groups ..... 103
3.5.3. Creating a New User ..... 104
3.5.4. Creating a New Group ..... 107
3.5.5. Adding, Deleting and Editing Rules ..... 110
3.5.6. Defining Rights on Folders ..... 111
3.5.7. Rights recommendations ..... 113
3.6. Hiding Studio Form Components ..... 115
3.7. Editing Rich Text Source Code ..... 118
3.8. Usage Tracking ..... 120
4. Working With Content ..... 124
4.1. CoreMedia Studio: log in and log out ..... 125
4.2. Using the Dashboard ..... 126
4.2.1. Adding Widgets ..... 126
4.2.2. Reloading Widgets ..... 127
4.2.3. Removing Widgets ..... 127
4.2.4. Scaling Widgets ..... 128
4.3. Locating Content ..... 129
4.3.1. Using Quick Search ..... 129
4.3.2. Searching in the Library ..... 130
4.3.3. Creating Search Folders ..... 136
4.3.4. Deleting a Search Folder ..... 137
4.3.5. Using Search Folders ..... 137
4.3.6. Navigating in the Library ..... 138
4.3.7. Finding Content Items that Link ..... 140
4.3.8. Opening Content Items From the Form View ..... 141
4.3.9. Opening Content Items from the Preview ..... 141
4.3.10. Showing Content Items in the Library ..... 142
4.4. Editing the Content Structure ..... 144
4.4.1. Creating Content ..... 144
4.4.2. Moving, Copying and Renaming Content Items ..... 157
4.4.3. Deleting and Restoring Content Items ..... 159
4.5. Editing the Navigation Structure ..... 161
4.5.1. Editing the Layout ..... 161
4.5.2. Creating a Navigation Node ..... 165
4.5.3. Adding a Sitemap ..... 168
4.5.4. Hiding Page from Navigation or Sitemap ..... 169
4.6. Editing Content ..... 170
4.6.1. Checking out and Checking in Content Items ..... 171

4.6.2. Comparing Versions ..... 173
4.6.3. Rich Text Editing ..... 175
4.6.4. Editing Struct Properties ..... 194
4.6.5. Editing Link Lists ..... 201
4.6.6. Managing Files ..... 206
4.6.7. Editing Images ..... 207
4.6.8. Editing Image Maps ..... 220
4.6.9. Advanced Teaser Management ..... 224
4.6.10. Editing 360°-Views ..... 231
4.6.11. Editing Shoppable Videos ..... 231
4.6.12. Editing Top-N Lists ..... 233
4.6.13. Setting a Displayed Date ..... 234
4.6.14. Time Dependent Visibility ..... 235
4.6.15. Working with Authors ..... 238
4.6.16. Metadata Management ..... 238
4.7. Managing Content ..... 245
4.7.1. Bookmarking Content ..... 245
4.7.2. Publishing Content ..... 247
4.7.3. Localizing Content ..... 259
4.7.4. Translating Content ..... 261
4.7.5. Synchronizing Content ..... 277
4.7.6. Working With Projects ..... 283
4.7.7. Getting Keyword Recommendations ..... 297
4.7.8. Checking Content in External Preview ..... 298
4.7.9. Uploading Content to Salesforce Marketing Cloud ..... 300
4.7.10. Adding Comments on Content Properties ..... 301
5. Working with Assets ..... 304
5.1. Extracted Metadata ..... 306
5.2. Creating Assets in Studio ..... 308
5.3. Creating Pictures from Assets ..... 310
5.4. Creating Videos from Assets ..... 312
5.5. Categorizing Assets ..... 314
5.6. Searching for Assets ..... 316
5.7. Publishing Assets ..... 317
5.8. Configuring the Asset Download Portal ..... 318
6. Working with Product Catalogs ..... 320
6.1. Using the CoreMedia Product Catalog ..... 321
6.1.1. Creating a New Category ..... 321
6.1.2. Creating a New Product ..... 322
6.1.3. Copying Products ..... 322
6.1.4. Editing the Category Hierarchy ..... 323
6.1.5. Deleting Products and Categories ..... 323
6.1.6. CoreMedia Product Catalog Content Mode ..... 323
6.2. Working with Commerce Content ..... 326
6.2.1. Accessing Commerce Content in Studio ..... 327
6.2.2. Adding Commerce Content to CMS Pages ..... 332
6.2.3. Adding CMS Content to Your Shop ..... 338
7. Working with Personalized Content ..... 368

7.1. Working with Experiences ..... 369
7.2. Working with Segments ..... 372
7.3. Previewing Client Personalization ..... 374
8. Working with User Generated Content ..... 376
8.1. Working with Comments and Reviews ..... 377
8.1.1. Opening the Moderation View ..... 379
8.1.2. Filtering the List of Moderated Items ..... 379
8.1.3. Approving or Rejecting a Comment ..... 379
8.1.4. Prioritize a Content ..... 381
8.1.5. Editing a Comment ..... 381
8.1.6. Working with the Blocklist ..... 382
8.1.7. Opening Corresponding Contents ..... 383
8.1.8. Writing Comments ..... 384
8.1.9. Annotating Users ..... 385
8.1.10. Browse and Search all Comments ..... 385
8.1.11. Transfer Comments in the Repository ..... 386
8.1.12. Preview Integration ..... 388
8.2. Working with Users ..... 389
8.2.1. Opening a User Profile ..... 390
8.2.2. Editing a User Profile ..... 392
8.2.3. Prioritize Users ..... 396
9. Reference ..... 398
9.1. Content Types ..... 399
9.2. Conditions ..... 404
10. Support ..... 410
Glossary ..... 412
Index ..... 417

# List of Figures

2.1. Architecture of a CoreMedia CMS system ..... 9
2.2. Folder properties ..... 11
2.3. Collection and its subtypes in search results ..... 12
2.4. The Article content item in Studio ..... 13
2.5. Content type chooser in the library ..... 14
2.6. Simplified site structure ..... 15
2.7. Navigation children and navigation on page ..... 17
2.8. Site Indicator linking to the root page ..... 18
2.9. Different layout variants of the same Collection ..... 19
2.10. Different page grids with the page grid navigation shown in the preview ..... 20
2.11. Locked Footer Bar ..... 21
2.12. Portrait Banner layout of a collection ..... 22
2.13. Action items in a page ..... 24
2.14. The workspace ..... 25
2.15. Zooming in the Preview ..... 28
2.16. Adapt the Preview for different devices ..... 28
2.17. Highlight Placements in the Preview ..... 29
2.18. The Control Room ..... 31
2.19. Project tab in Studio ..... 33
2.20. Your projects in the Control Room ..... 34
2.21. Moderation View ..... 35
2.22. User Manager GUI ..... 35
2.23. User Management View ..... 37
2.24. The Library ..... 38
2.25. Studio with docked Library ..... 39
2.26. The Publication window ..... 41
2.27. Feedback Hub ..... 42
2.28. Content Hub ..... 43
2.29. The Dashboard ..... 44
2.30. Localization status ..... 45
2.31. Localization status: Disabled – in this case for English (Canada) ..... 46
2.32. Localization status: Outdated ..... 46
2.33. Starting Workflow App from the Main Menu of Studio ..... 47
2.34. Workflow app main view ..... 48
2.35. Opened workflow in Workflow app ..... 48
2.36. Workflow App in split-screen mode with Content App ..... 49
2.37. Studio shortcuts ..... 50
2.38. Rules attached to a group ..... 52
2.39. Check effective rules ..... 52
2.40. Editing history of a content item ..... 54
2.41. Notifications ..... 55
2.42. Validators in the Form ..... 56
2.43. Searching for issues in content ..... 57
2.44. Starting a publication workflow ..... 58
2.45. Starting your workflows in the Control Room ..... 59

2.46. Managing workflows in the Workflow App ..... 60
2.47. Preferred site in the Library ..... 61
2.48. Side-by-side view showing the master relationship ..... 62
2.49. Sites Window ..... 63
2.50. Studio with local catalog items ..... 66
2.51. Library with eCommerce content ..... 67
2.52. Tooltip with catalog name ..... 68
2.53. Initial activation window ..... 121
2.54. Open Preferences Menu ..... 122
2.55. Preferences Menu ..... 123
2.56. Open In-App Guides Portal ..... 72
2.57. The In-App Guides Portal ..... 73
2.58. Perform an action to proceed ..... 74
2.59. Click Next to proceed ..... 74
2.60. Leave a guide ..... 76
2.61. Give us feedback ..... 76
2.62. Feedback Form ..... 76
3.1. Enabling spell checking ..... 80
3.2. Editing Permissions in Firefox ..... 81
3.3. Site Chooser button with information ..... 83
3.4. Publish button in the Action toolbar ..... 84
3.5. Change behavior of the publish button in the Action toolbar ..... 85
3.6. Preferred Types New Content Selection ..... 86
3.7. Preferred Types in the New Content Menu (Library) ..... 86
3.8. Preferred Types in the Create menu ..... 86
3.9. Preferred Search Types in the Library ..... 86
3.10. Mobile device preview with scrollbars ..... 88
3.11. Site selector ..... 89
3.12. Configuring available filter categories for comments ..... 90
3.13. Guidance by Workflow Validation ..... 91
3.14. WorkflowValidation Settings ..... 92
3.15. Hint for Disabled Validation ..... 92
3.16. Hint for Active Dependent Content Items Size Limit ..... 94
3.17. Enable warnings again ..... 96
3.18. Elastic Social configuration in a Settings content item ..... 97
3.19. Quick Create an Article ..... 100
3.20. Editor Preferences ..... 100
3.21. Global Settings Folder ..... 100
3.22. Folder paths in Content Creation content ..... 100
3.23. The About window ..... 102
3.24. Open User Manager ..... 103
3.25. Search fields ..... 104
3.26. Create new user with icon ..... 105
3.27. Create new user popup windows ..... 105
3.28. Set home folder and group membership ..... 106
3.29. Check effective rules ..... 107
3.30. Create new group ..... 108
3.31. Create a new group popup windows ..... 108
3.32. Set group members and membership ..... 109

3.33. Check effective rules ..... 110
3.34. Adding rules ..... 110
3.35. New rule in list ..... 111
3.36. Open the Properties window ..... 112
3.37. Add rules to folder ..... 113
3.38. Configure Content Form Button ..... 115
3.39. Content Form Configuration Dialog ..... 116
3.40. Content Form Configuration Button after Configuration ..... 116
3.41. Enabling source code editing ..... 118
3.42. Initial activation window ..... 121
3.43. Open Preferences Menu ..... 122
3.44. Preferences Menu ..... 123
3.45. Open Preferences Menu ..... 122
3.46. Preferences Menu ..... 123
4.1. The login window ..... 125
4.2. Adding a widget ..... 126
4.3. Widget in configuration mode ..... 127
4.4. Scale widget ..... 128
4.5. Quick Search Dialog ..... 129
4.6. Quick Search Results ..... 130
4.7. Full-text search options ..... 131
4.8. Filter your results ..... 134
4.9. Creating a search folder ..... 137
4.10. Search Folders ..... 138
4.11. Hiding columns ..... 139
4.12. The Tree view ..... 139
4.13. Content items linking to this content item ..... 140
4.14. Linklist with context menu ..... 141
4.15. Context menu in the preview ..... 141
4.16. Context menu in Preview ..... 142
4.17. Open in library ..... 143
4.18. Article creation ..... 145
4.19. Page form ..... 146
4.20. New Gallery dialog ..... 148
4.21. The Query List Editor ..... 149
4.22. Items with fixed position ..... 151
4.23. Drag file in Library ..... 152
4.24. Upload document with wrong MIME type into a media link list ..... 153
4.25. Upload dialog ..... 153
4.26. Topic page for keyword Corporate ..... 154
4.27. Default topic page ..... 155
4.28. Link to a topic page as a tag ..... 155
4.29. Topic page creation dialog ..... 156
4.30. Custom topic page for the keyword "Young" ..... 157
4.31. Changing the name of a folder ..... 159
4.32. Locked Navigation Bar placement in a sub page ..... 162
4.33. Selecting layout variant in placement of a Page content item ..... 164
4.34. Page creation dialog ..... 165
4.35. Page from Template dialog ..... 167

4.36. Adding a Sitemap ..... 168
4.37. The Sitemap type ..... 169
4.38. Comparison view ..... 173
4.39. Get the list of changes ..... 174
4.40. Rich text change highlighting ..... 174
4.41. Selecting another version ..... 175
4.42. A simple text field and a rich text field ..... 175
4.43. Paragraph styles ..... 180
4.44. Language menu for code block ..... 181
4.45. Choose a style ..... 183
4.46. Create a link ..... 184
4.47. Select more options ..... 185
4.48. Specify size of table ..... 186
4.49. Select table ..... 187
4.50. Inserting paragraphs ..... 187
4.51. Contextual toolbar ..... 188
4.52. Edit rows menu ..... 188
4.53. Merge Cells menu ..... 189
4.54. Drag image into a rich text field ..... 189
4.55. Editing an image ..... 190
4.56. Find text in rich text ..... 192
4.57. Find text in rich text ..... 192
4.58. Struct editor in a Settings content item ..... 194
4.59. Select content type for Link ..... 198
4.60. Context menu for struct entry ..... 199
4.61. A *Split* button with available options ..... 200
4.62. LinkList with several entries ..... 200
4.63. Example of a link list ..... 202
4.64. Search for content in the link list ..... 202
4.65. Drag image into link list ..... 203
4.66. Annotated link list with changed default state of link list item ..... 205
4.67. Visible from annotation in placements ..... 206
4.68. A field for external files ..... 206
4.69. Cropping images ..... 209
4.70. Overview with all selection frames ..... 209
4.71. Moved focus point with automatically arranged 1:1 crop ..... 210
4.72. Decoupled selection frame ..... 210
4.73. The crop is too small ..... 211
4.74. Enlarged image with white background ..... 212
4.75. Move focus point ..... 213
4.76. Effect of rotation on the selection frames ..... 217
4.77. Exposure controls ..... 217
4.78. Undo steps ..... 219
4.79. Reset to initial state ..... 220
4.80. Hot Zones in an image map (pop-up) ..... 221
4.81. Hot Zones in an image map (inline) ..... 221
4.82. Configuring image maps ..... 222
4.83. Creating hot zones with an inline overlay zone selected for editing ..... 223

4.84. Open Teaser panel ..... 225
4.85. Select style for movable teaser text ..... 226
4.86. Formatting text ..... 226
4.87. Position text ..... 227
4.88. Example style definition ..... 229
4.89. Call-to-action button in teaser view ..... 229
4.90. Call-to-action checkbox in teasable content item ..... 230
4.91. Call-to-action checkbox in Teaser content item ..... 230
4.92. Images of a dress with a slight counterclockwise rotation ..... 231
4.93. The shoppable video editor ..... 232
4.94. Site preview with shoppable video ..... 233
4.95. Dynamic Elastic Social List ..... 234
4.96. Setting a Displayed Date ..... 235
4.97. The Validity field ..... 236
4.98. Icons for validity ..... 236
4.99. The visibility ..... 237
4.100. Time Travel dialog ..... 237
4.101. Authors ..... 238
4.102. Query List with taxonomy condition ..... 239
4.103. Categorized Article ..... 240
4.104. Tag chooser ..... 241
4.105. Taxonomy filter in the Library ..... 242
4.106. The taxonomy editor ..... 243
4.107. Adding a new tag ..... 244
4.108. Check for linking content items ..... 244
4.109. Bookmark in the Form view ..... 246
4.110. Bookmark in the Library ..... 246
4.111. Current state of the content item ..... 247
4.112. Start Publication Workflow Window from Action Toolbar ..... 248
4.113. Start Publication Workflow Window ..... 249
4.114. Selecting a group or user ..... 250
4.115. Warning because of missing rights ..... 250
4.116. Content form showing a locked content item ..... 251
4.117. Abort workflow ..... 252
4.118. Offered Reviewed Publication Workflow in the Control Room ..... 252
4.119. Accepted workflow ..... 253
4.120. Next steps for Reviewed Publication workflow ..... 254
4.121. Needs Revision Task of Reviewed Publication Workflow in the Control Room ..... 255
4.122. Offered Compose Task of Reviewed Publication Workflow ..... 255
4.123. Publication window with problems ..... 257
4.124. Dialog when content has incoming links ..... 259
4.125. Disable updates from master ..... 261
4.126. Sites Window ..... 263
4.127. Derive a site dialog ..... 264
4.128. Derived Site in Sites Window ..... 265
4.129. Translation State Dashboard Widget ..... 266
4.130. Translation State Library Filter ..... 267
4.131. Locale Switcher ..... 268

4.132. Side-by-Side view ..... 269
4.133. Translation workflow detail panel next steps ..... 270
4.134. Download XLIFF file ..... 272
4.135. Translation Workflow Window ..... 273
4.136. Translation workflow panel ..... 275
4.137. Aborting translation workflow in Control Room ..... 276
4.138. Aborting translation workflow in Workflow App ..... 277
4.139. Sites Window ..... 279
4.140. Derive a site dialog ..... 279
4.141. Derived synchronized sites ..... 280
4.142. Localization Workflow Window ..... 281
4.143. Warning for deselected subsites ..... 282
4.144. Newly created project ..... 284
4.145. Withdrawal error window ..... 285
4.146. Withdrawal project ..... 286
4.147. About this Project section of a project ..... 286
4.148. Content field of the project tab ..... 287
4.149. The Members section of the project tab ..... 288
4.150. Add Members dialog ..... 288
4.151. Add members window with selected group ..... 288
4.152. Removing members from a project ..... 289
4.153. New to-do ..... 290
4.154. Selecting a user ..... 290
4.155. Calendar of a project ..... 291
4.156. Completed to-do ..... 291
4.157. Dragging to-dos ..... 292
4.158. Filtered to-dos ..... 292
4.159. Publish all in the Project window ..... 293
4.160. Start publication workflow context menu ..... 294
4.161. Publish selected items ..... 294
4.162. Localize all ..... 295
4.163. Withdraw all from Project ..... 295
4.164. Context menu of the project tab ..... 296
4.165. Deletion of a project ..... 296
4.166. Feedback Hub Window with keywords from Imagga system ..... 297
4.167. Nagbar showing Error during the loading of keywords ..... 298
4.168. Preview dialog ..... 299
4.169. External Preview menu ..... 299
4.170. Preview dialog ..... 300
4.171. Upload progress ..... 300
4.172. Uploaded assets ..... 301
4.173. Editorial Comments in the Content Form ..... 302
4.174. Editorial Comments in the Feedback Hub ..... 302
5.1. Picture Asset content item ..... 305
5.2. IPTC metadata setting in Photoshop ..... 307
5.3. Metadata for Assets ..... 309
5.4. Create picture from asset button ..... 310
5.5. Newly created picture shown in Picture Asset ..... 311
5.6. Product linked by picture ..... 311

5.7. Create video from asset button ..... 312
5.8. Newly created video shown in Video Asset ..... 313
5.9. Taxonomy for assets ..... 314
5.10. Add category to asset ..... 315
5.11. Download portal with Asset ..... 315
5.12. Select property for publication ..... 317
5.13. Asset download portal ..... 318
5.14. Configuration of the download portal ..... 319
6.1. Editing the CoreMedia product catalog ..... 321
6.2. Newly created product ..... 322
6.3. Choose how to copy product ..... 323
6.4. The CoreMedia product catalog preference tab ..... 324
6.5. CoreMedia product catalog as content ..... 324
6.6. Catalog Lost And Found ..... 325
6.7. eCommerce content in Library ..... 328
6.8. Commerce product opened in Studio ..... 329
6.9. Search for product ..... 330
6.10. Search for product variants ..... 330
6.11. Search picture content items assigned to a product ..... 331
6.12. Found picture content items assigned to a product ..... 331
6.13. New product teaser ..... 333
6.14. Example of a product list ..... 334
6.15. CMS content in product list ..... 335
6.16. Augmented categories in the tree view of the Library with specific icon ..... 336
6.17. Creating an e-Marketing spot ..... 337
6.18. Newly created e-Marketing spot ..... 338
6.19. Commerce website with CMS content ..... 339
6.20. Example of a page with a page grid for fragment use. The placements that corresponds to the commerce layout are highlighted in blue and are the only ones that can be edited. ..... 340
6.21. Decision diagram ..... 341
6.22. Add widget to slot in Salesforce ..... 343
6.23. Add widget to slot in SAP Commerce ..... 344
6.24. Add widget to Slot in *Connector for HCL Commerce* ..... 345
6.25. Configure CoreMedia Content Widget ..... 345
6.26. Creating page for Content Display ..... 346
6.27. Augment a category ..... 348
6.28. Newly created augmented category ..... 349
6.29. Augmented Category with content ..... 350
6.30. Augment PDPs through a category ..... 351
6.31. Newly created augmented category ..... 351
6.32. Augment a Product ..... 352
6.33. Newly created augmented product ..... 353
6.34. Navigation Settings for another page ..... 354
6.35. Product detail page with image gallery and download content .... 357
6.36. Assign a product to a picture ..... 358
6.37. Assign a product to a picture ..... 359
6.38. Set Product Image URLs in Management Center ..... 360

6.39. Set default catalog picture in Studio ..... 361
6.40. Enabling editing of navigation ..... 363
6.41. New page with inherited header and footer ..... 364
6.42. New page in navigation ..... 365
6.43. Make navigation editable ..... 366
6.44. Added category in navigation ..... 366
6.45. Hide from navigation ..... 367
7.1. Define an experience ..... 369
7.2. Information window for an experience ..... 370
7.3. Update experience variants ..... 370
7.4. Synchronizing variants ..... 371
7.5. Segmentation Content Item ..... 372
7.6. Select preview from the linklist toolbar ..... 374
7.7. Preview in Preview Toolbar ..... 375
8.1. Moderation View ..... 377
8.2. Prioritized comments ..... 378
8.3. Applying filters to the list of comments and users ..... 379
8.4. Select the email window and reject comment ..... 380
8.5. Select the email window and restore last comment or user ..... 381
8.6. Add word to blocklist ..... 382
8.7. Open the target content in the Form ..... 383
8.8. Show curated content list in the Form ..... 384
8.9. The annotation field ..... 385
8.10. All comments view ..... 386
8.11. Create Article from comments ..... 387
8.12. Article created from the comment ..... 387
8.13. Comment highlighting in the preview ..... 388
8.14. Comment highlighting in the preview ..... 388
8.15. User Profile View ..... 389
8.16. Open user profile from the Moderation View ..... 391
8.17. Search window with suggestions for your search ..... 392
8.18. Results of the search ..... 392
8.19. Reset the profile ..... 394
8.20. Editing the current email ..... 396
8.21. Prioritize Users ..... 397
9.1. Date condition example ..... 405
9.2. Time condition example ..... 406
9.3. Date and time condition example ..... 406
9.4. String condition example ..... 406
9.5. `Enum` condition example ..... 407
9.6. Segment condition example ..... 407
9.7. SFMC Journey condition example ..... 407
9.8. Commerce segment condition example ..... 408
9.9. Keyword condition example ..... 408
9.10. Percentage keyword condition example ..... 408
9.11. Example of a Boolean condition ..... 409

# List of Tables

1.1. Typographic conventions ..... 4
1.2. Pictographs ..... 5
1.3. Changes ..... 6
2.1. Key icons in the Header Bar ..... 26
2.2. Workflow Lists ..... 32
2.3. Content Hub Feature Set ..... 43
2.4. Rights icons ..... 51
2.5. Example groups ..... 53
2.6. Group rights ..... 53
2.7. Icons for starting workflows ..... 60
2.8. Site icons ..... 62
3.1. Recommended rights ..... 113
4.1. Dashboard Icons ..... 126
4.2. Search Elements ..... 132
4.3. Icons for content item creation ..... 144
4.4. Icons for managing content ..... 148
4.5. Icons for managing content ..... 152
4.6. Icons for Deletion and Restoring ..... 159
4.7. Layout icons ..... 161
4.8. Properties for the Page ..... 165
4.9. Properties for the Page ..... 167
4.10. Apply changes icons ..... 171
4.11. Supported Markdown shortcodes ..... 176
4.12. Toolbar Elements ..... 178
4.13. Text formatting icons ..... 182
4.14. Link editing icons ..... 183
4.15. Table editing icons ..... 186
4.16. Image icons ..... 190
4.17. Formatted Text - Content related Keyboard Shortcuts ..... 193
4.18. Struct editor icons ..... 195
4.19. Names of link list icons ..... 201
4.20. Buttons for cropping images ..... 211
4.21. Icons for flipping and rotating ..... 215
4.22. Icon for exposure changes ..... 217
4.23. Icons for undo and redo ..... 218
4.24. Icon for resetting to initial state ..... 220
4.25. Configurable properties for a teaser overlay style ..... 227
4.26. Configurable properties for the 'style' sub struct ..... 228
4.27. Time dependent visibility icon ..... 237
4.28. Taxonomy icons ..... 239
4.29. Publication State icons ..... 247
4.30. Options to finish a workflow ..... 253
4.31. Options to finish a workflow ..... 254
4.32. Icons for Publication Actions without Workflow ..... 256
4.33. Icon for Withdrawal ..... 258
4.34. Icons for Translation ..... 262
4.35. Icons for Synchronization ..... 277

4.36. Icons for project management ..... 283
6.1. Icons for working with commerce ..... 326
6.2. Fields of product list ..... 334
6.3. Placeholders for URL parameters ..... 355
6.4. CoreMedia Product Asset Widget configuration options ..... 356
9.1. Content types of CoreMedia Blueprint ..... 399
9.2. Logical operators ..... 404

# List of Examples

3.1. CoreMedia Richtext 1.0 in Studio ..... 118
3.2. CoreMedia Richtext 1.0 on Server ..... 119

# 1. Preface

This manual describes how to use *CoreMedia Studio*, a web application that is intuitive for users new to the system while flexible enough for experts to use. It's never been so simple to create and maintain your website in *CoreMedia CMS*.

In addition, the manual describes the use of *CoreMedia Studio* plugins from other CoreMedia modules. That is, *CoreMedia Adaptive Personalization*, *CoreMedia Elastic Social* and *CoreMedia Blueprint* and the eCommerce Connectors.

In this manual, you will learn how to use *Studio* to maintain your content.

- Chapter 2, *Basic Concepts* [7] describes several basic features of the CoreMedia system, including the GUI, that you should be aware of while working.
- Chapter 3, *Administration* [77] describes some administrative tasks that you have to do.
- Chapter 4, *Working With Content* [124] shows you how to work with *CoreMedia Studio* content.
- Section 2.14, "Asset Management" [69] shows how to work with picture assets.
- Chapter 6, *Working with Product Catalogs* [320] shows how to work with the internal CoreMedia catalog and with external eCommerce catalogs.
- Chapter 7, *Working with Personalized Content* [368] shows how to work with personalized content, that is how to use content that depends on specific characteristics of a user.
- Chapter 8, *Working with User Generated Content* [376] shows how to work with user-generated content, comments, likes, user profiles, for instance.
- Chapter 9, *Reference* [398] gives an overview over the default content types and condition types used in *CoreMedia Content Cloud*.

# 1.1 Audience

This manual gives users of *CoreMedia Content Cloud* a quick overview of all the basic concepts and functionality they require for their day-to-day work. This includes the creation of new text items, the editing of existing text, the publication of new content or the maintenance of a website's structure but also the generation of personalized content or the moderation of comments and users.

# 1.2 About this Manual

*CoreMedia Content Cloud* is a modular system where most of these add-ons add functionality to *CoreMedia Studio*. Nevertheless, the system you are working with might not contain all the add-ons or might be otherwise adapted to your specific needs. Therefore, your system might miss some of the functions described in this manual or might have some extras that are not described here.

Add-ons are:

- *CoreMedia Elastic Social*: Adds functionality for user generated content (comments, likes ...) and external user management. See Chapter 8, *Working with User Generated Content* [376] for the functionality.
- *CoreMedia Native Personalization*: Adds functionality for personalized content with customer segments or personas. See Chapter 7, *Working with Personalized Content* [368] for the functionality.
- *Advanced Asset Management*: Adds functionality for management of assets, like pictures, videos or PDF documents. See Section 2.14, "Asset Management" [69] for details.
- *CoreMedia Blueprint*: Combines all modules and adds functionality such as easy creation of content.
- *Commerce Hub*: Connects the CoreMedia System with commerce systems from third-party providers.
- *Content Hub*: Connects external systems with the CoreMedia System and displays the content in Studio.
- *Feedback Hub*: Connects external systems with the CoreMedia System, so that you get external information to your data. For example, tags, related content or spellchecking.

Functionality that stems from separate modules is therefore highlighted with a note at the beginning of the section.

# 1.3 Typographic Conventions

CoreMedia uses different fonts and types in order to label different elements.
The following table lists typographic conventions for this documentation:

| Element | Typographic format | Example |
|---|---|---|
| Source code<br>Command line entries<br>Parameter and values<br>Class and method names<br>Packages and modules | Courier new | `cm systeminfo start` |
| Menu names and entries | Bold, linked with \| | Open the menu entry<br>**Format\|Normal** |
| Field names<br>CoreMedia Components<br>Applications | Italic | Enter in the field *Heading*<br>The *CoreMedia Component*<br>Use *Chef* |
| Entries | In quotation marks | Enter "On" |
| (Simultaneously) pressed keys | Bracketed in "<>", linked with "+" | Press the keys <Ctrl>+<A> |
| Emphasis | Italic | It is *not* saved |
| Buttons | Bold, with square brackets | Click on the **[OK]** button |
| Code lines in code examples which continue in the next line | \ | `cm systeminfo \`<br>`-u user` |
| Mention of other manuals | Square Brackets | See the [Studio Developer Manual] for more information. |

*Table 1.1. Typographic conventions*

In addition, these symbols can mark single paragraphs:

| Pictograph | Description |
| --- | --- |
| | Tip: This denotes a best practice or a recommendation. |
|  | Warning: Please pay special attention to the text. |
| | Danger: The violation of these rules causes severe damage. |

*Table 1.2. Pictographs*

# 1.4 Change Record

This section includes a table with all major changes that have been made after the initial publication of this manual.

| Section | Version | Description |
| --- | --- | --- |

*Table 1.3. Changes*

# 2. Basic Concepts

*CoreMedia Studio* is the editor that can be used by both casual and power users of the system. Its functionality covers all the stages in a web-based editing process, from content creation and management over management of user generated content to preview and publication. As a modern web application, *CoreMedia Studio* is based on the latest standards like Ajax and is therefore as easy to use as a normal desktop application.

This chapter describes a number of basic concepts used by *CoreMedia Content Cloud*. While *CoreMedia Studio* is simple to use, a number of concepts nonetheless differ from the familiar Windows working environment. Accordingly, please ensure you read this section to familiarize yourself with the basic *Studio* concepts.

- Section 2.1, "Production and Live Environments" [9] describes the architecture of a *CoreMedia CMS* system.
- Section 2.2, "Content Items and Folders" [11] discusses the concept of content items, projects and folders.
- Section 2.3, "Content and Site Model" [14] describes the different content types and how they define site.
- Section 2.4, "CoreMedia Studio User Interface" [25] presents an overview of the user interface of *CoreMedia Studio*.
- Section 2.5, "Permissions and Rights" [51] gives a brief introduction to the permissions system used by *CoreMedia Studio*.
- Section 2.6, "Versions" [54] describes how versions of content items are managed.
- Section 2.7, "Notifications" [55] describes the notifications mechanism.
- Section 2.8, "Validators" [56] describes validators, which ensure that all relevant properties of a content item are filled by the editor.
- Section 2.9, "Workflows" [58] describes the usage of workflows for publication and translation.
- Section 2.10, "Multi-Site and Multi-Language" [61] describes how multiple sites in multiple languages are supported in *CoreMedia Studio*
- Section 2.11, "Personalization" [64] describes the basics of conditional content which can be used to show content depending on specific conditions, for example in *Native Personalization*
- Section 2.12, "Elastic Social" [65] gives a short overview over *Elastic Social* features.
- Section 2.13, "Product Catalogs" [66] gives a short overview over the integration of commerce content into *Studio*.
- Section 2.14, "Asset Management" [69] gives an overview over the management of assets in *Studio*.

- Section 2.15, "In-App Guide Portal" [70] gives on overview over the In-App Guide Portal which gives you, among other things, guides inside Studio.

# 2.1 Production and Live Environments

A *CoreMedia CMS* installation consists of two separate systems. The production system is used to produce your content: here you can write new articles, correct mistakes, change the page structure and much more besides. However, the key point here is that none of these changes will have a direct effect on the websites that are accessible to your readers.

In order for changes to be visible on the live system, you need to approve and then publish these changes. Before you publish your changes, however, you can use the *Studio* preview to see how these changes will look to your users on different devices and different times. This functionality is provided by the *CAE Preview* module which you can see in Figure 2.1, “Architecture of a CoreMedia CMS system” [9].

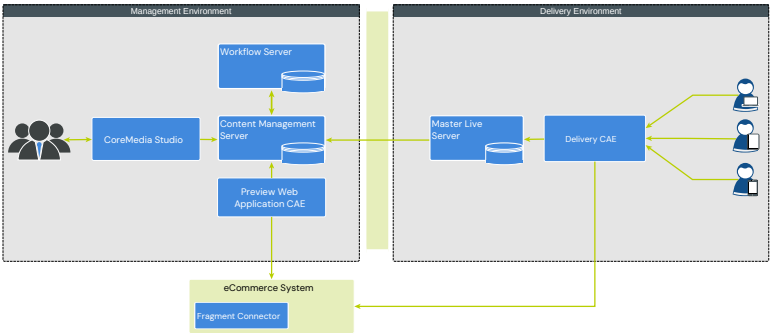


*Figure 2.1. Architecture of a CoreMedia CMS system*

The two systems are separated by a firewall. This also ensures that the production environment is protected from external attacks.

*Publishing content items*

To make a content item visible for your users, you must publish it to the live environment (see Section 4.7.2, “Publishing Content” [247]). If this content item references other items that have not yet been published, its publication would result in "dead links" in the live environment. For example, a user would click on a menu link and receive an error message stating that the link target does not exist in the live environment.

*Preserve link consistency*

To prevent this happening, *CoreMedia CMS* automatically checks whether a content item links to other content. If these items have already been published, then everything is OK. If not, the system checks whether the other content items

have been approved. If yes, then they are also published automatically – if not, then the publication process is aborted. In this case, you will need to approve the other content items first or remove the links. The Publication window gives you precise details of what you then need to do (see Section 4.7.2, "Publishing Content" [247]).

While *CoreMedia CMS* generally enforces link consistency as described in the previous paragraph, certain link properties might be set up as weak links. These links are excluded from the previously described checks.

# 2.2 Content Items and Folders

With *CoreMedia Content Cloud* you do not work directly on pages but on content items. A content item is an object that holds information that belongs to a certain area. Take, for example, a `Picture` item. Here you can store the actual image, describing text, metadata and many more information. On the other hand, an `Article` item stores the article's text, teaser text and other data. And, what's more, the article might contain a link to the `Picture` item, so that the picture is shown, when a user views the article. This way, you create your websites by combining content items. See Section 2.3, “Content and Site Model” [14] and Section 9.1, “Content Types” [399] for a more detailed description of the available content items.

Content items are organized in a folder hierarchy – similar to the Windows file system.

With *CoreMedia Studio* you create new or edit existing content items and edit the folder hierarchy.

*Folder properties*

You can get some information about a folder (for example, creator, last modification date) from the folder properties window. It opens, when you select **Properties** from the context menu of the folder.

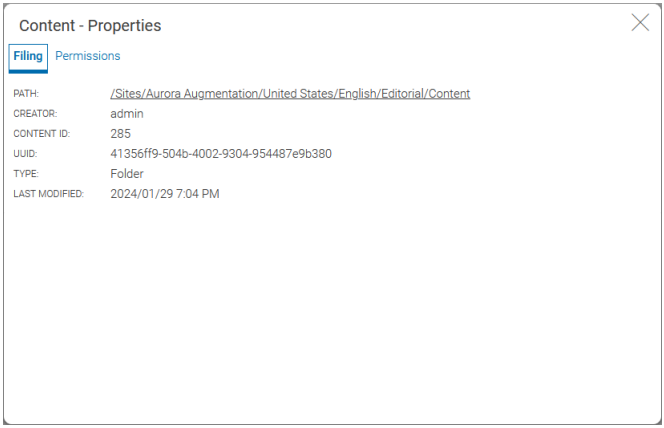


*Figure 2.2. Folder properties*

*Home folder*

The `Home` folder is a specific folder with a name equal to your login name. Besides your private content, it contains settings, queries and custom dictionaries automatically created by the system when needed. In the *Studio* library the

Home folder is located at the top level of the folder hierarchy tree. Please keep in mind, that other users can not directly browse to your home folder.

*Content item states*

When you start editing a content item, it changes its state to edited or checked out, that is other users can only see it in read-only mode but can not write to avoid potential conflicts. When finished you can apply your changes (checked in state) which creates a new content version and allows other users to check out the content item again. To make your changes available on the website you have to approve (approved state) and publish (published state) the content item.

*Content types*

Each content item has a certain content type. A type specifies the number of form fields (or properties) and their allowed values like numbers, formatted texts, or dates. This means two content items of the same type have common fields. A type can also be seen as a template or pattern. If you create a new content item, you need to select its content type first. The standard version of *CoreMedia Content Cloud* comes with content types for articles, images or a website structure.

*Content type hierarchy*

CoreMedia content types are organized hierarchically and inherit properties from types that are higher in the hierarchy. A `Gallery` and a `Query List` type for example are subtypes of `Collection` and inherit the property *Collection Title*, for instance. More important is, that you can link to all subtypes of `Collection` when you have a link list that allows `Collection` types. You can see this relation when you select `Collection` in the Library and you also see `Gallery` items and other subtypes in the result (see Figure 2.3, "Collection and its subtypes in search results" [12]).

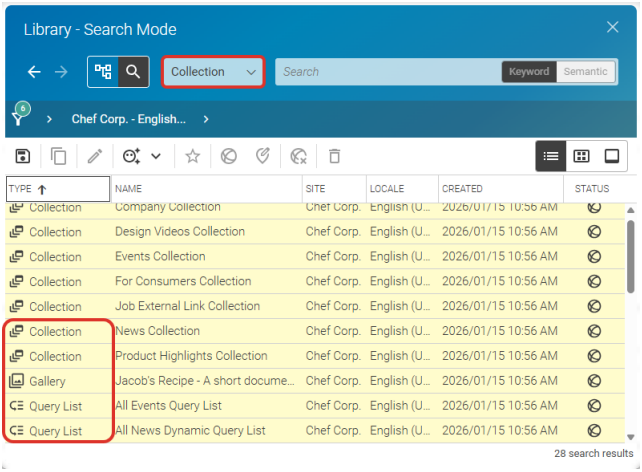


*Figure 2.3. Collection and its subtypes in search results*

For details about the included content types see Section 9.1, “Content Types” [399] and Section 2.3, “Content and Site Model” [14].

Figure 2.4, “The Article content item in Studio” [13] shows an example from *CoreMedia Blueprint*, the `Article` content type. This type "packages" various kinds of information for an article: the article text itself, a header line and title, the same fields for the teaser text shown on the website, plus an image.

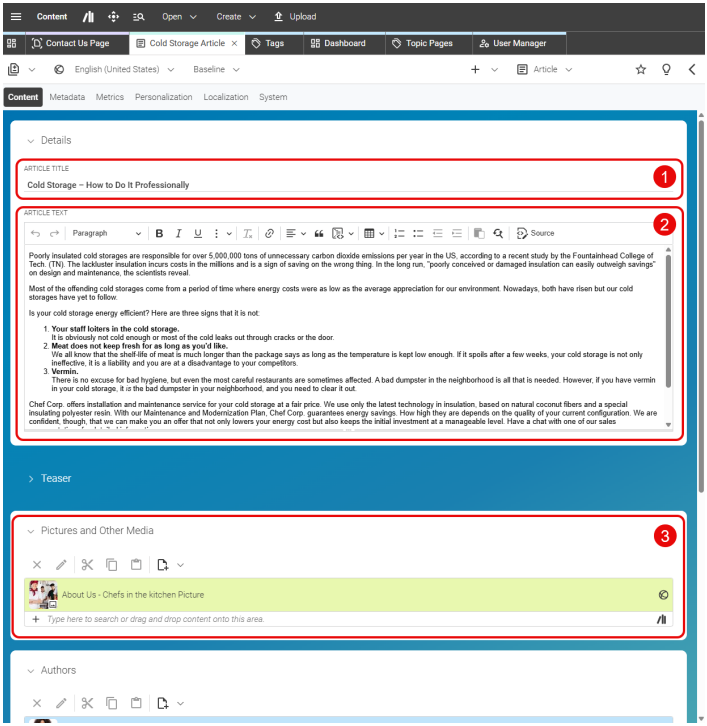


*Figure 2.4. The Article content item in Studio*

The figure shows an article content item with three different field types:

- (1) Rich text fields for longer sections that contain formatting.
- (2) An embedded image from another content item.
- (3) Simple text for short captions such as headings, header lines or similar items.

# 2.3 Content and Site Model

*CoreMedia Content Cloud* contains several content types (see Section 2.2, "Content Items and Folders" [11] for a definition of content types) that you can use to build your websites and create your content. Section 9.1, "Content Types" [399] gives you an overview over some of the most important types. CoreMedia recommends that you read this section, when you are not familiar with the CoreMedia content type model.

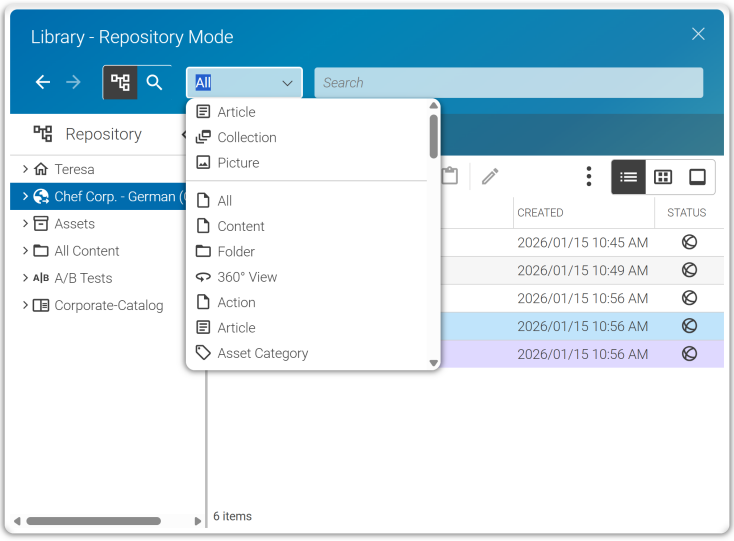


*Figure 2.5. Content type chooser in the library*

In principle, you can differentiate between content types for the following tasks:

- Defining the content of your website:

  The content types you can use (articles, images, videos...) to create content that your users see on the website.
- Defining the navigation structure of your website:

  The content type (Page) you can use to create a hierarchical navigation structure with menus.
- Defining the layout of your website:

The content types (Layout Variant, CSS ...) you can use to change the layout of elements on the site.

- Grouping content:

  The content types (Collection, Gallery...) you can use to group, for example, pictures that are shown in one slideshow.

- Adding active items:

  The content types (Action, Placeholder) you can use to add interactive functionality such as search or login to your website.

The following subsections describe these task in more detail.

## 2.3.1 Simple Example Website Structure

Figure 2.6, "Simplified site structure" [15] shows an example of a simple site where each box stands for a content item and arrows mean that a content item links to another item. The text in the boxes contains the name of the property which connects it to the other content item. For simplicity, only a few content types are shown, content is used very sparingly and the linked contents of the `(Sub) Page` are omitted. They are similar to that of the `Page`, except for the `Site Indicator`.

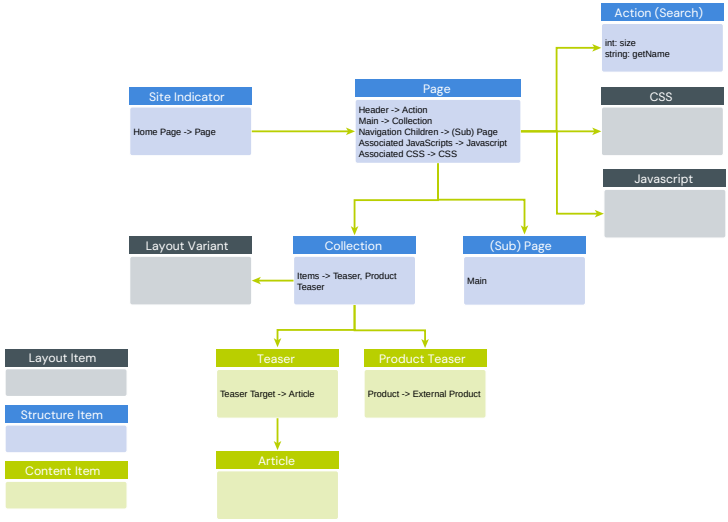


*Figure 2.6. Simplified site structure*

So, the Page content is linked by the `Site Indicator` making it the main page of the site. The page links to a `Javascript` and `CSS` content which allows you, or a designer, to customize the layout of the page without the help of your IT department. The page also links to an `Action` which adds a search field to the header of the page. To create a simple hierarchy, the page links to a sub page which normally appears as a subpage in the navigation of the main page (see Figure 2.7, "Navigation children and navigation on page" [17]) To add real content, the page references a `Collection` from a placement.

The `Collection` groups content together. It links to a `Layout Variant` which determines the layout of the collection, a slide show or a carousel for example. Finally, the `Collection` contains several links to `Teaser` and `Product Teaser` types which contain some real content but may also link to an `Article` or in case of the `Product Teaser` to a target in the eCommerce system.

There are many more content types involved to create a comprehensive website. See Section 9.1, "Content Types" [399] for an overview.

## 2.3.2 Structure of a Website

All content of a specific website in *CoreMedia Content Cloud* is located below the same folder. The English Chef Corp. website of the example content, for instance, lies in `CMS/All Content/Sites/Chef Corp./United States/English`.

The navigation structure is built from `Page` contents that reference their children pages or `Augmented Page` items (see Figure 2.7, "Navigation children and navigation on page" [17]). On top of the navigational hierarchy of a site is one root page. A page must not have more than one parent and no cyclic dependencies are allowed. That is, when page B is a sub page of page A then, page A cannot be a sub page of B.

From this structure *CoreMedia Content Cloud* automatically creates navigational elements on the page. A tree navigation or a breadcrumb navigation, for instance. The order of the elements in the navigation is defined by their order in the *Navigation Children* link list of the parent Page.

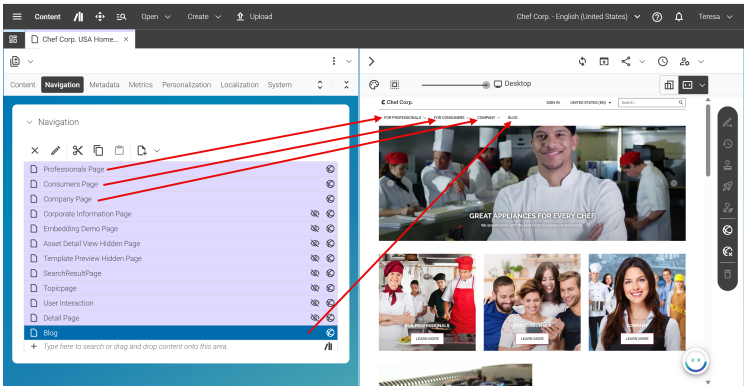


*Figure 2.7. Navigation children and navigation on page*

*Hiding Pages from navigation or sitemap*

Sometimes, you do not want to have some pages appearing in the navigation. Simply removing the page from the *Navigation Children* link list is not a solution, because a page that you want to use in your site (as a link target for example) must be part of the navigation hierarchy. Therefore, you can limit the visibility of a Page as it is described in Section 4.5.4, “Hiding Page from Navigation or Sitemap” [169].

In Figure 2.7, “Navigation children and navigation on page” [17] you see that the Navigation Children "Professionals Page", "Consumers Page", "Company Page", and "Blog" are shown in the main Navigation of the example page, but you do not want to show "Corporate Information Page" and others which are marked by the crossed out eye symbol.

*Marking the root page*

The root page of the navigation hierarchy is the Page content item which is linked by a Site Indicator content item. To check this, open the `Site Indicator` content in the `Content` folder of the site and have a look at the *Home Page* field (see Figure 2.8, “Site Indicator linking to the root page” [18].

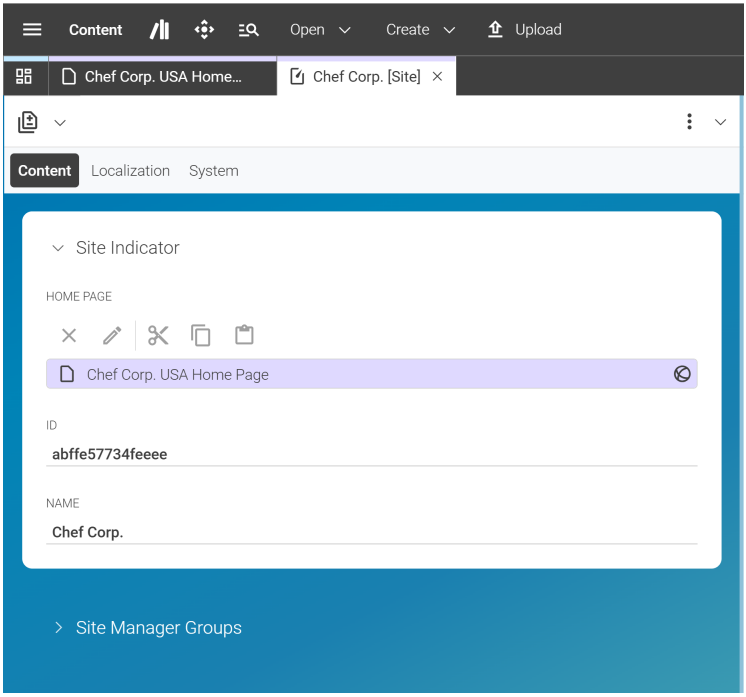


*Figure 2.8. Site Indicator linking to the root page*

# 2.3.3 Layout of a Website

A main goal of a content management system is to separate content from layout. This way, the editor has only to deal with the content, for example, articles, images or videos, while predefined templates ensure a consistent layout of the website. However, in practice, an editor also needs to adjust the layout of pages and sites, for a new microsite for instance.

With *CoreMedia Content Cloud* an editor has several possibilities to influence the layout of the generated web page.

*CoreMedia CMS* offers a solution where editors can select the layout for specific parts of a website from predefined templates. Figure 2.9, "Different layout variants of the same Collection" [19], shows an example.

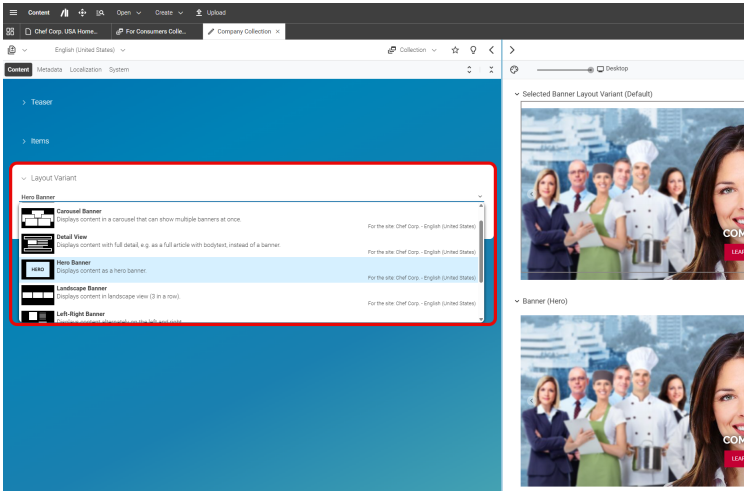


*Figure 2.9. Different layout variants of the same Collection*

You can adapt the layout on three levels:

- The layout of a page. The layout of a page is defined by its page grid. A page grid offers several sections (called placements) on the page into which you can place content. *CoreMedia Content Cloud* comes with several predefined page grids, for example a 2-column layout, a 3-column layout or a 2-column layout with a headline. You can edit the content for a page grid with the page grid editor. Figure 2.10, “Different page grids with the page grid navigation shown in the preview” [20] shows different page grids for a Page. Read Section 4.5.1.1, “Editing a Page Grid” [163] for details.
- A layout variant for each placement of the page grid.
- A layout variant for a content type, for example, an Article, a Picture or a Collection. This layout variant is only applied to the specific content. Figure 2.9, “Different layout variants of the same Collection” [19] shows different layouts for a collection.

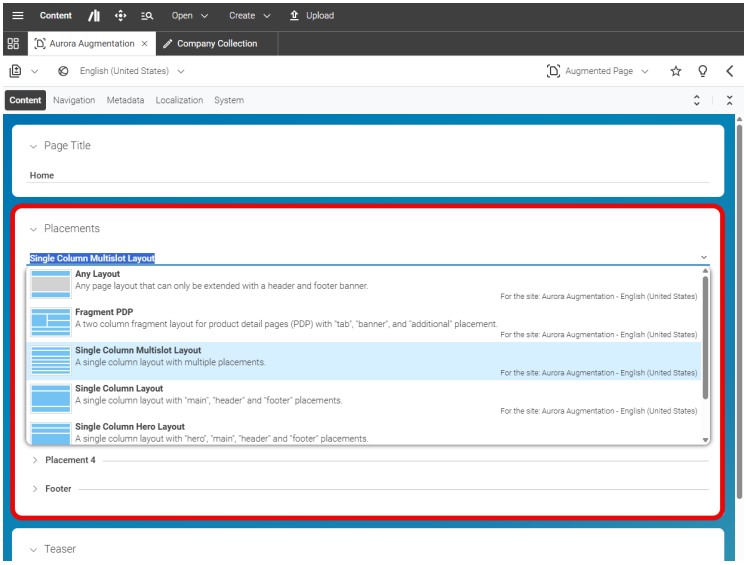


*Figure 2.10. Different page grids with the page grid navigation shown in the preview*

In general, page grids and layout variants will be predefined in your CoreMedia system so that you can only select from existing choices.

*Inheriting content*

It is often desirable to have common objects on all pages of a website. Because linked Page content items build the hierarchical structure of your website, you can reuse content of parent pages. To do so, *CoreMedia Blueprint* lets you lock and inherit content. Locking means, that subpages are not allowed to change the content defined in a parent page and inheritance means that a su page reuses the content of the parent page.

For locking and inheritance, subpages must use the same page grid or must at least have placements in their page grid that have the same identity.

For example, a website might want to lock the footer part of the page grid, because it contains important elements that should be easily accessible on all pages.

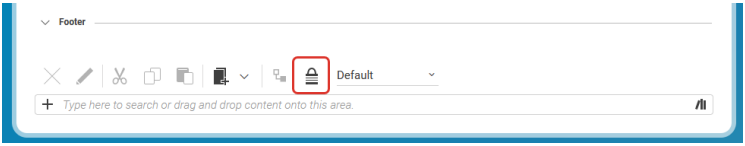


*Figure 2.11. Locked Footer Bar*

*Style your website*

*CoreMedia Content Cloud* also offers content types that let you style your websites by adding CSS, JavaScript, HTML or images without help of your IT department.

## 2.3.4 Business Content of a Website

Business content is the content with which you entertain, inform or inspire your users, through articles, images, videos, audio, image maps and many more. *CoreMedia Content Cloud* offers several content types which are custom-made for these different use cases:

- **Textual Content**

  For textual content, there is only one type, `Article`. That does not mean, that you cannot add textual descriptions to other types, for example multimedia content. It does also not mean, that an Article contains only textual content. You can, for example, add images to an `Article`.

- **Multimedia Content**

  For multimedia content, such as images, video, audio there are specific content types with the corresponding names. They have special properties to store this content. Most notable is the blob property in which you store the multimedia content but there are also properties for metadata such as copyright information and more.

- **Commerce Content**

  In order to include content from your commerce system into the CMS, there are placeholder types (`e-Marketing Spot`, `Augmented Page`, `Product Teaser`) to which you can drag content from the commerce system. These types hold a reference to the eCommerce content and can be added to the site like all other contents. A `Product Teaser`, for example, can be used at the same locations as a `Teaser`.

  In order to manage product information without an external commerce system, there are two content types `Category` and `Product`. You can use these types to create a product hierarchy with nested categories.

- **Dynamic Content**

Dynamic content types are a bit special. They collect other content items from the repository due to some conditions and can be used as a "placeholder" for this content. Examples are the Top-N lists from the Elastic Social extension (see Section 4.6.12, “Editing Top-N Lists” [233]) or the Content Queries from *CoreMedia Blueprint* (see Section 4.4.1.5, “Creating Content Queries” [148]).

*Teaser concept*

A teaser is a short information chunk on a web page that links to a more comprehensive description or to a larger site. Many websites use teasers on the sidebar of a page. Most of CoreMedia content types have properties `Teaser Title` and `Teaser Text`. When you use such a content in a "teaser" position of your website, then the content of the teaser properties will be shown and the teaser links to the complete content.

*Teaser content type*

If you use an Article, for example, in teaser position, then the teaser will always link to this article. To create different teasers to the same content, *CoreMedia Content Cloud* has a specific `Teaser` content type. `Teaser` content has again a `Teaser Title`, `Teaser Text` and `Pictures` but also `Teaser Targets` field which holds the link targets of the teaser. You can add several targets to the `Teaser Targets` field, where the first entry is the target when you click the teaser. However, you can add call-to-action buttons to all targets. In this case, a user who clicks the call-to-action button opens the target of the button.

## 2.3.5 Grouped Content

Grouped content is important to bundle content and show it together in one layout component such as a carousel, a slide show or in a tile layout. Figure 2.12, “Portrait Banner layout of a collection” [22] shows the content of a `Collection` in a portrait banner layout.

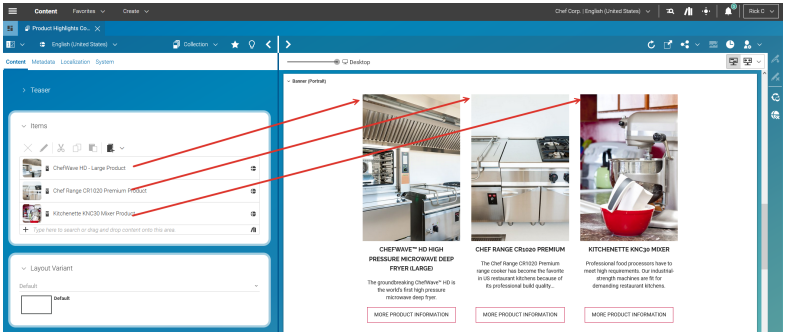


*Figure 2.12. Portrait Banner layout of a collection*

*Content types for grouping*

*CoreMedia Content Cloud* comes with different collection types for different grouping use cases.

**Collection** A `Collection` item is the standard content for grouping. You simply add the content items you want and they will be shown together.

**Gallery** A `Gallery` item is a collection specifically used for images for the common use case of an image gallery on your website.

**Query List** A `Query List` item is a bit more sophisticated because you do not explicitly say which content items should be included. Instead, you define conditions which a content must fulfill in order to be shown. When you have tagged your content, you might include only content with the tag "Salad", for instance.

**Personalized Search** A `Personalized Search` is similar to a Query List but differs by the search conditions. A `Query List` only searches for content depending on tags and context while a `Personalized Search` can also search for content depending on the user's context. So, you might exclude content that a user has already visited or include content that is tagged with keywords that a user likes.

## 2.3.6 Active Content

The *CoreMedia Content Cloud* example website offers functionality such as site search, login, password reset and many more. You can place these functions in several locations of your `Page` content, but the most natural locations are the headers and footers of a page as shown in Figure 2.13, “Action items in a page” [24]. To place these function blocks, *CoreMedia Content Cloud* contains the content types `Action` and `Placeholder`. As the name suggests, these content items do not contain functional content such as HTML or JavaScript but are only placeholders, that are replaced with the actual content when a website is sent to a user.

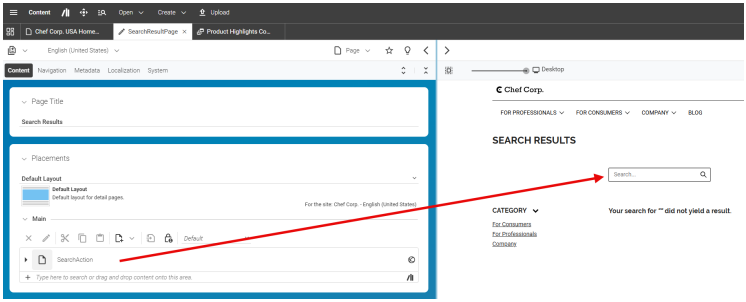


*Figure 2.13. Action items in a page*

The system contains predefined content items for common use cases, such as search or registration. The actual available items depend on your CoreMedia installation.

# 2.4 CoreMedia Studio User Interface

The *Studio* user interface is designed to be as simple and uncluttered as possible. All activities can be completed within the Content App and the Workflow App. As the name suggests, you will edit your content in the Content App and your Workflow in the Workflow App.

## 2.4.1 Content App

The Workspace of the Content App is your main working screen for creating and editing content. As the Workspace supports drag and drop and context menus, you can work in the same way as with a normal desktop application. One special feature is the combination of the Form View (5) on the left side and the Preview (6) on the right side. Changes that you make in the Form View are immediately visible in the Preview, whereas right clicking on an element in the Preview highlights the associated field in the Form View.

The Library (8) and the Control Room (1) can both be displayed docked (default for the Control Room) and in a floating mode (default for the Library). Docking is available on the left border and right border of of the workspace. The position of the components can be changed via drag and drop. When Library and Control Room are both docked in the same area, they hide each other on activation. The size and position of the Library and the Control Room are persisted and get restored on Studio startup.

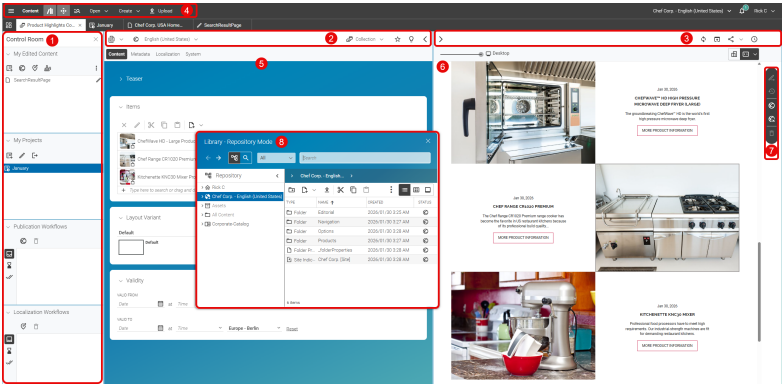

*Figure 2.14. The workspace*

The Workspace consists of a number of different functional components:

- (1) Control Room
- (2) Form Toolbar
- (3) Preview Toolbar
- (4 + 9) Header Bar
- (5) Form View
- (6) Preview
- (7) Action Bar
- (8) Library

Above the Preview Toolbar in the upper right corner you will find the user menu which allows you to log out and to adapt user specific settings for *CoreMedia Studio*.

The following icons are used in the Header Bar:

| Icon | Name |
|---|---|
| | Library |
| | Control Room |
| | Inbox and Jobs Window |
| | Main Menu |

*Table 2.1. Key icons in the Header Bar*

## Control Room

You manage your current projects and workflows in the Control Room (see Section 2.4.1.1, “Control Room” [29]). You find all content items you have currently edited, you can create and manage projects and use them to start workflows.

## Jobs Window

The Jobs window shows you long-running processes, such as XLIFF uploads, content creation with the Content Hub or augmentation of commerce objects. In the Jobs window you can cancel these jobs.

## Form Toolbar

The Form Toolbar presents you with information about the current state of the content item. In addition, you can also use the arrow icons "<" and ">" to hide or show (collapse/expand) the Preview.

## Preview Toolbar

Use the Preview Toolbar to show or hide (expand/collapse) the Preview, to navigate between different pages or to send the address of the content item you are currently editing to a colleague.

## Header Bar

You can use the Header Bar to open the Main menu ☰, Library , the Dashboard , the Control Room  and the Jobs and Inbox window . In addition, you can use predefined searches  (see Section 4.3.5, “Using Search Folders” [137]) and the **Create** menu.

## Form View

Use the Form View to edit your content items. As soon as you start editing, you are given exclusive editing rights, that is, other users will no longer be able to change any content. The Properties tab lists certain items of content metadata. *Path* is used to show the content item in the Library. You can use the field *Editing History* to open previous versions of the content item. If you have several Forms open, you can sort them dragging the tabs. Right-clicking on the tab opens a context menu where you can, for example, close all other forms.

## Preview

In the Preview, you can see the content item being edited in the Form View as it would appear on your website. The field currently being edited is in the focus of the Preview. Similarly, if you right-click on an area in the Preview, then the associated field in the Form View is also highlighted. When hovering with the mouse over the Preview, the selectable areas are highlighted by a gray border (To disable the highlights on mouse over see Section 3.3.7, “Disabling the Highlighting of Preview Content on Mouseover” [87]). If the Preview contains links, then you can also use these to navigate and open up an augmented page, for example. You can then use the browser's context menu or the reload icon in the URL of the preview to return to your original page.

You can zoom into the preview or adapt the preview to the window size using the icons at the top of the preview.

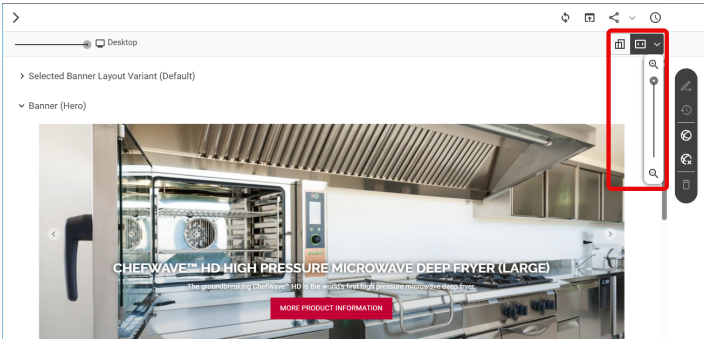


*Figure 2.15. Zooming in the Preview*

With the slider at the top left you adapt the Preview to different output devices.

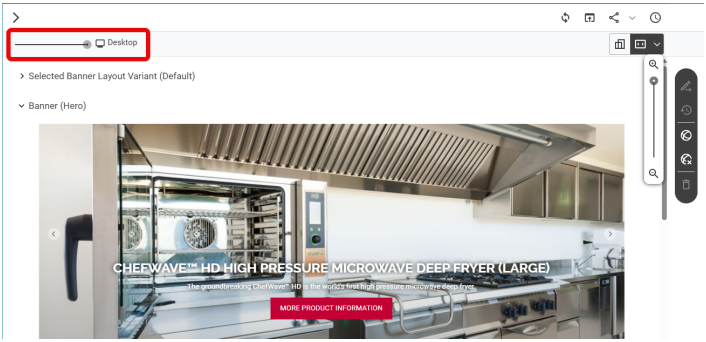


*Figure 2.16. Adapt the Preview for different devices*

The layout of a page can change in your CoreMedia system depending on the output device ("responsive Design"). For a mobile phone, for example, a single-column layout is better to use, due to the screen size. The devices are depicted in the preview as is shown in Figure 2.16, “Adapt the Preview for different devices” [28].

With the button at the top left you can highlight placements in the preview. The button is only visible when the page contains placements.

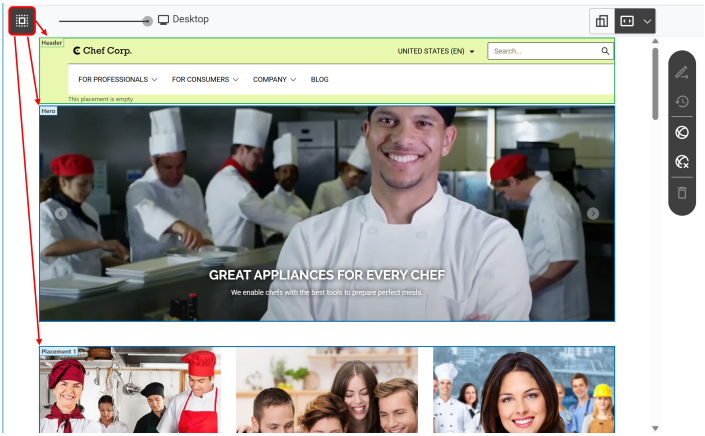


*Figure 2.17. Highlight Placements in the Preview*

By clicking the button, the placements on the page are highlighted with the placement name in the left upper corner. Figure 2.17, “Highlight Placements in the Preview” [29].

There are three types of placements:

- Blue Box: If the placement is filled you will find a blue border around it along with the placement name.
- Green Box: If the placement is supported by the layout, but left empty, you will find a green box with the information that the placement is empty and the placement name.
- Orange Box: If the placement is not available because the *CoreMedia Content Cloud* pagegrid layout does not support this placement at all, you will find an orange box with that information with the placement name.

# 2.4.1.1 Control Room

The Control Room is the place in *CoreMedia Studio* where you can manage your work in progress:

- You see all content you have currently edited (when you use the *Advanced Asset Management* you can prevent assets from being added to the *My Edited Content* list).
- You can group and manage your content in projects.
- You can manage publication and localization workflows.

The Control Room consists of the following main areas:

- *My Edited Content* contains the list of content you have edited. If you start editing a content item or create a new one it is automatically added to the list. You can also add other content items by drag and drop to this list. With selected items from the list you can create a new project or start workflows.

  When you use the *Advanced Asset Management* component, you can prevent assets from being added to the *My Edited Content* list by unchecking the *Show Assets* checkbox.
- *My Projects* contains the list of projects in which you are a member. It allows you to create and manage projects.
- *Publication Workflows* shows offered, pending and finished publication workflows.
- *Localization Workflows* shows offered, pending and finished localization workflows.

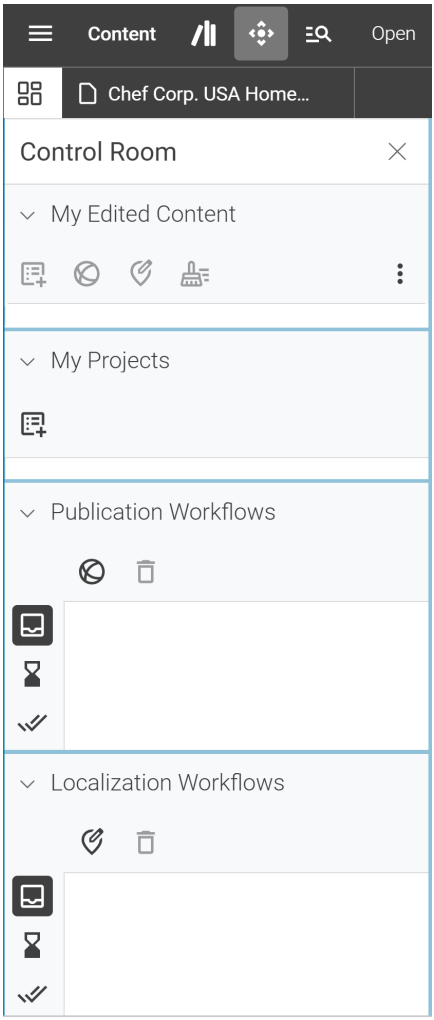


*Figure 2.18. The Control Room*

The *Publication Workflows* and *Localization Workflows* areas contain switchable workflow lists. With the icons shown in Table 2.2, "Workflow Lists" [32] you can choose between the *Inbox*, *Pending* or *Finished* workflow lists. Numbers at the icons indicate the number of workflows contained in the lists. You can double-

click a workflow in the list in order to open it in the Workflow app and see more workflow details.

| Icons | Description |
|---|---|
| | The *Inbox* workflow list contains all workflows for which you have accept and edit rights. A workflow vanishes from the list when another user accepts it. |
| | The *Pending* workflow list contains all your unfinished workflows. A workflow vanishes from the list when it is finished. |
| | The *Finished* workflow list contains all finished workflows you have created or accepted and applied. |

*Table 2.2. Workflow Lists*

To access the Control Room, click the **[Show Control Room]** icon in the Header Bar header, or select **Control Room** from the **Open** menu, or press **F4** on your keyboard (if not configured otherwise).

## 2.4.1.2 Projects

Projects are a lightweight way to collaborate with your colleagues and manage your content. With a mouse click, you create a new project and add a description and due date (1), invite colleagues to the project (2), add content via drag and drop (4), and create to-dos with due dates for the project. The calendar (3) gives you an overview of the due dates of your project. All members of a project have the same rights, so everyone can, for example, add new members, remove members, or create to-dos.

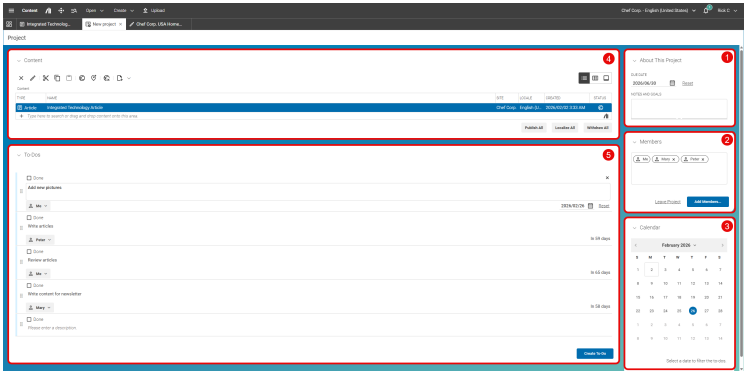

*Figure 2.19. Project tab in Studio*

In the Control Room, there is a tab *My Projects* in which you find all projects of which you are a member. From here, you can start workflows for the content of a project.

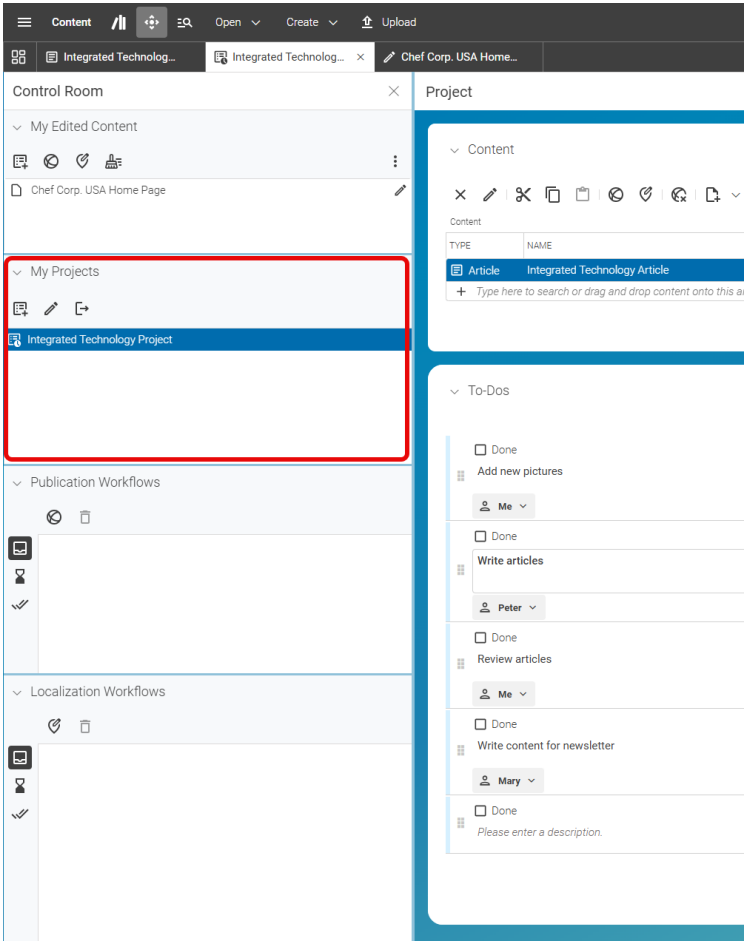


*Figure 2.20. Your projects in the Control Room*

## 2.4.1.3 Moderation View

CoreMedia Elastic Social feature

The Moderation View is the place where you manage comments and content created by the users of your website.

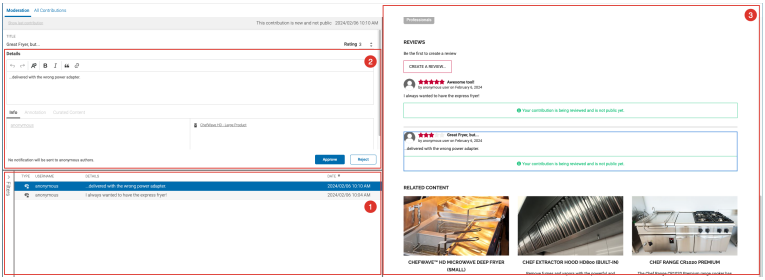

*Figure 2.21. Moderation View*

The Moderation View consists of the following main areas:

- (1) The list of users and comments where you select the item you want to edit.
- (2) The information for the selected item. Here you do your editing.
- (3) The preview of the selected content. In the figure, you have selected a comment that was made at the "Insalata Caprese" article and you see the comments section of this article in the preview

# 2.4.1.4 User Manager

The User Manager is the place where you manage your *Studio* users, groups and rules (for the CoreMedia rules, see Section 2.5, “Permissions and Rights” [51]).

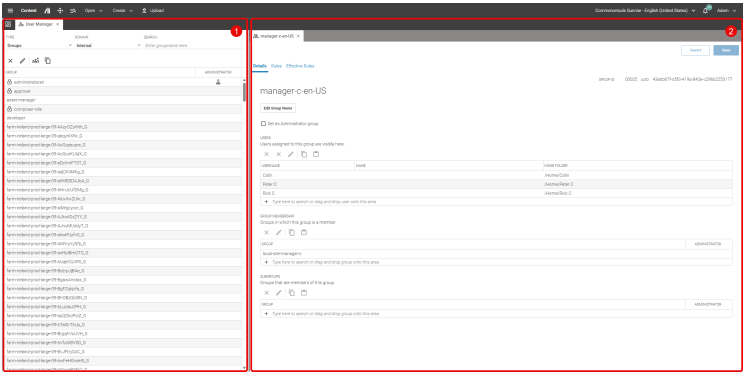

*Figure 2.22. User Manager GUI*

The User Manager consists of two main parts.

- The list view (1) of the users and groups where you can search, open a group or user and create new groups and users.
- The detail view (2) where you can check and edit the details of a user or group.

## 2.4.1.5 Elastic Social User Management View

CoreMedia Elastic Social feature

The User Management View is the place where you manage the users of your website.

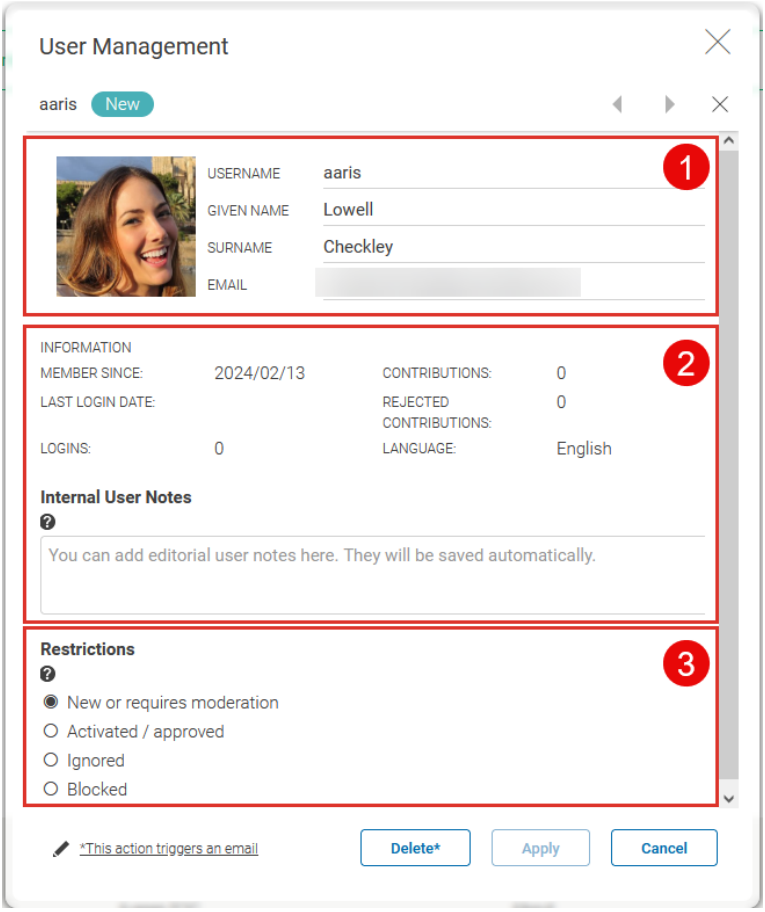


*Figure 2.23. User Management View*

The User Management View consists of the following main areas:

- (1) The personal data entered by the user.
- (2) Statistical data about the activities of the user.
- (3) The status of a user. This is the place where you can, for example, block a user.

# 2.4.1.6 Library

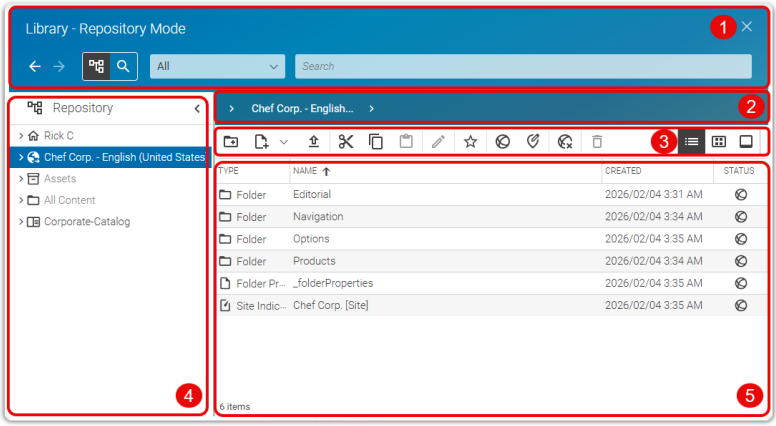


*Figure 2.24. The Library*

The Library is the core management module within *CoreMedia Studio*. Similar to Windows Explorer, you can use the Library to search through *CoreMedia CMS* and commerce system contents, create new folders or content items and insert content items into link lists. If configured, you can even access content from third-party systems.

You can use the Library in Browse mode or in Search mode. In Browse mode, the folders are being presented in a tree structure. You can use the view buttons to choose either a list-like or a thumbnail presentation of a folder's contents.

The Library consists of five main areas:

- (1) Search and navigation bar
- (2) Path information
- (3) Toolbar
- (4) Filter panel and tree view
- (5) Content window

To access the Library, click the **[Show library]** icon in the Header Bar or select **Library** in the **Open** menu of the Header Bar. Alternatively, press **F3** on your keyboard (if not configured otherwise).

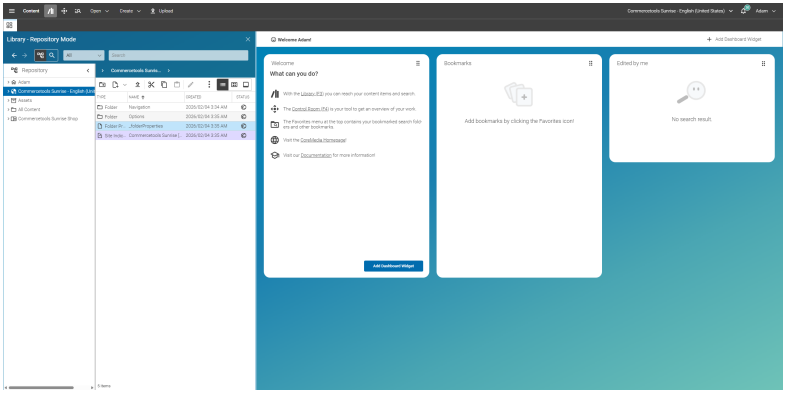

*Figure 2.25. Studio with docked Library*

## Search and navigation bar

The search and navigation bar can be used to execute a full-text search of your content items or to page through the display history by using the arrow icons. You can restrict the full-text search to certain content types. The library automatically switches into the search mode when you enter a search term.

When you select a folder and enter a search term, the search will only find content items that are located in or below the selected folder. You can then use the Path information breadcrumb (see below) to modify the search path.

## Path information

You can use the first double icon in the path information section to switch between library mode and search mode of the library. The second double icon switches between CMS content and eCommerce content. The current library or search path is shown as a breadcrumb navigation. You can use the breadcrumb navigation in the search mode to select the folder in which you want to search or for a fast navigation.

## Toolbar

You can use the toolbar to create content items and folders, to switch between the list view and tile view, and to approve, publish, withdraw, and delete content items. Buttons in the toolbar might be inactive when you don't have the rights to create certain content types or folders in the current folder, respectively.

### Filter and tree panel

If you are in library mode, you will see all folders of the CMS for which you have appropriate rights in the tree panel. If you are in search mode, you will see all filters. You can use filters in the filter panel to filter the content displayed by "Status" and "Last edited by", for example. The "x" icon in the title rows of the filters can be used to restore the default setting.

### Content window

If you are in the search mode, the content window shows the content that has been found in a list or tile view. In library mode, you can view all the CMS content items for which you have the appropriate permissions. You can use a context menu to open, approve, publish, withdraw and delete content items. The first item of this context menu is the default action that you can trigger with a double-click. You can also copy and move content via drag and drop. New content items or folders can only be created in the library mode.

You can drag content items from the content window to link lists in the Form View and drag images into rich text fields of a content item opened in the Form View.

## 2.4.1.7 Publication Window

When you publish content items, it may happen that the publication process fails because other linked content items have not yet been published or approved. In such cases, the Publication window opens, with a *Conflicts* tab that presents you with details of how to successfully publish your content items.

Right-click the content to open a context menu that lets you fix the conflict.

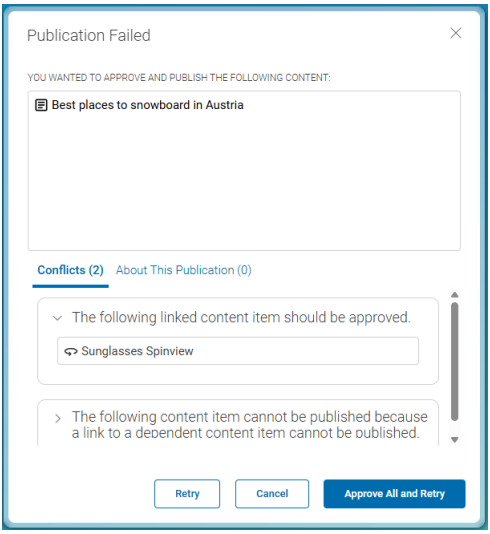


*Figure 2.26. The Publication window*

# 2.4.1.8 Feedback Hub for Content Fields

The *CoreMedia Feedback Hub* is a floating window that gathers and displays feedback related to the currently opened content item.

You can open the Feedback Hub by clicking on the icon in the upper toolbar of the content item. Since the window only refers to the currently opened content item, it disappears as soon as the content item is closed or switched. Every Feedback Hub feature can be reached by a corresponding icon in the tab bar of the window. A colored dot indicates if valuable feedback is available for the given feature.

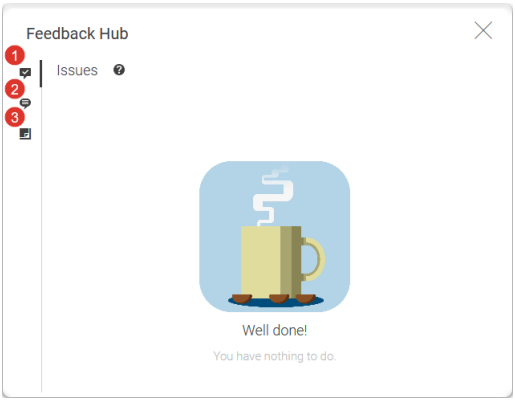


*Figure 2.27. Feedback Hub*

Depending on your CoreMedia system installation, the Feedback Hub contains at least the Issues tab (1), and the Comments tab (2). The Feedback Hub can be extended by your system administrator with additional tabs. The *Issues* tab shows all validation issues of the content item, while the *Comments* tab shows all editorial comments for the content item. Both tabs are described in more detail in Section 2.8, "Validators" [56] and Section 4.7.10, "Adding Comments on Content Properties" [301], respectively.

## 2.4.1.9 CoreMedia Content Hub

Use the *CoreMedia Content Hub* to browse, search, preview, and import content from external systems.

NOTE

For step-by-step instructions, see the Content Hub How-To Guide.

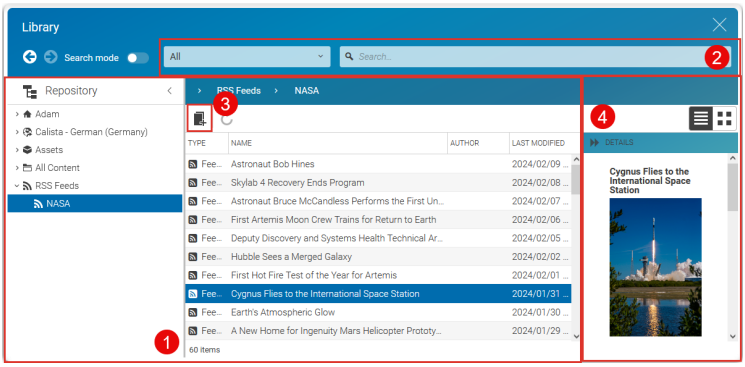


*Figure 2.28. Content Hub*

The Content Hub displays each configured external system on the left side of the library tree. You can navigate within the external system and, if the search bar is enabled, search for content. Depending on the external system, searching within subfolders may not be supported.

The following table provides an overview of the Content Hub feature set:

| Feature | Description |
|---|---|
| Browsing | The external system can be browsed via the library tree or by navigating through the folders in the main section of the library |
| Search | If the search bar is not disabled when selecting a folder in the left library tree, it is possible to search within the external system. Some systems do not offer a search below a specific folder. If that is the case, the breadcrumb of the search will indicate it. |
| Content Import | With the Content Hub, you can import content from an external system into CoreMedia by simply dragging it into a CoreMedia folder. Content can also be imported using the Create new content button in the Library toolbar. |
| Preview | The Content Hub defines a new preview panel on the right site of the library. This preview panel offers a detail view of the selected Content Hub item or folder. The details that are shown need to be configured according to the Studio Developer Manual (Section Content Hub). |

*Table 2.3. Content Hub Feature Set*

# 2.4.1.10 Dashboard

The Dashboard in *CoreMedia Studio* gives you a quick overview of your current work. You can position different widgets on a grid to create your personal workspace.

*CoreMedia Studio* contains the following widgets, for example:

- Edited by me: Shows the content items that you have edited most recently.
- Edited by others: Shows content items that are currently edited by others.
- Simple Search: Shows the results of a search that you have configured in the widget.
- Saved Search: Shows the results of a saved search that you have configured in the library.
- Site Performance Widget: A *Blueprint* feature that shows the performance of a site, that is its page views and publications.
- Translation Overview: Shows the translation state of the selected site.
- Open To-Dos: Shows all your open To-Dos.

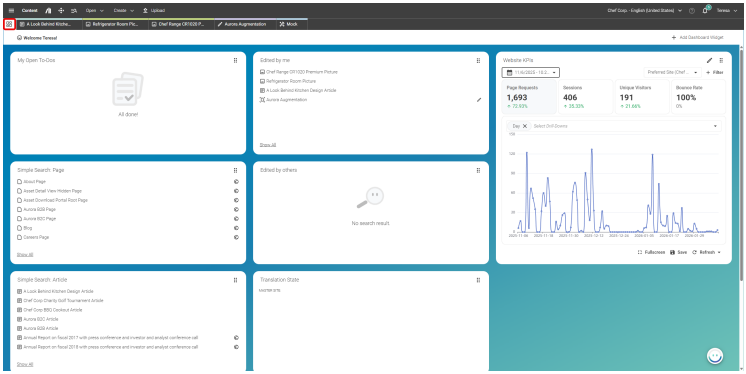

*Figure 2.29. The Dashboard*

When *CoreMedia CMS* was introduced in your company, additional widgets may have been developed for your specific needs.

To access the Dashboard, click the tab, select **Dashboard** in the Main menu, or press **F2** on your keyboard (if not configured otherwise).

# 2.4.1.11 Locale Switcher

This component allows users to switch between the different locales of a content item and to manage its synchronization status.

By clicking on one of the entries in the list, you will switch to the content in that particular locale. This does not open the content in a new tab.

If you open the master content item, you can view all derived content items and you will see their current status. There are three options:

- Up-to-date
- Disabled
- Outdated

In this case, the localization status of the content is *Up-to-date* (1):

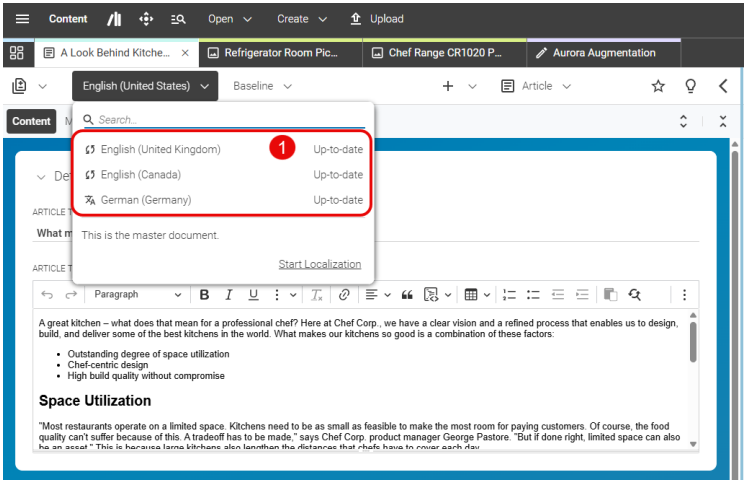


*Figure 2.30. Localization status*

If something is not marked *Up-to-date*, you can now start a new localization workflow by clicking *Start Localization*.

In the Locale Chooser, you will see the current localization status for all derived content. You can easily switch between the different locales.

If the synchronization for the selected locale is disabled (2), you will be notified as follows:

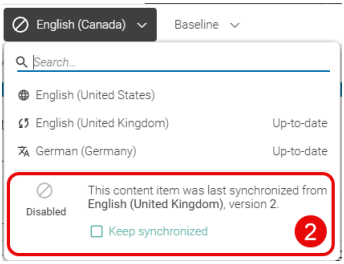


*Figure 2.31. Localization status: Disabled – in this case for English (Canada)*

You can re-activate the synchronization by selecting the *Keep synchronized* checkbox.

If the status is outdated, you will be notified by the word "Outdated" (3).

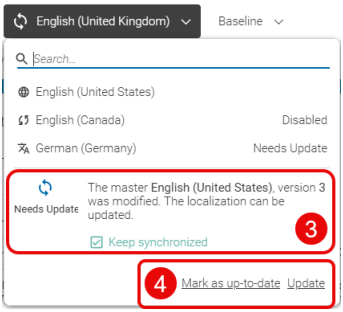


*Figure 2.32. Localization status: Outdated*

Clicking *Mark as up-to-date* (4) will set the master version of the open content item to the current version of the master content.

Clicking *Update* will start a localization workflow to update the content item. For example, for a translated content, a translation workflow will be started, and a synchronization workflow for synchronized contents.

# 2.4.2 Workflow App

### Keep only one browser tab for each app

The Workflow App opens in a separate browser tab where you are already logged-in. When you log out from the Content App or Workflow App (or be automatically logged out) you will be logged out from both apps.

When you log in again, you will only be logged into the app where you enter the login data. For the other app you have to reload the app (<F5> in the tab). When you forget to do so, and, for example, you open a workflow from the Content App, the Workflow App will open in a new tab.

You now have two tabs with the Workflow App, one in which you are logged in and one where you are not. That's not a problem yet. However, when you reload the Workflow App tab where you are not logged in, by mistake, you suddenly have two tabs of the Workflow App in which you are logged-in. And this is a problem! The Content App can not determine anymore with which Workflow App tab it must communicate.

Therefore, you have to take care that there is only one Content App tab and one Workflow App tab open and that you are logged in in both.

The Workflow App is a stand-alone application in which you manage your workflows. You start the workflows from the Control Room in Studio but afterwards, you will manage the workflows in the Workflow App.

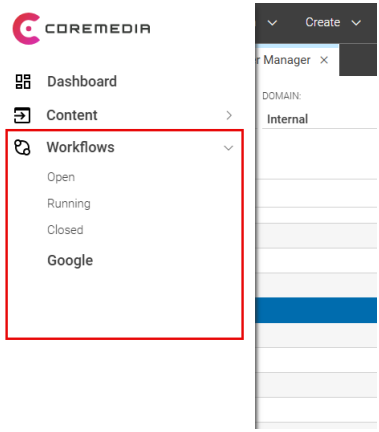


*Figure 2.33. Starting Workflow App from the Main Menu of Studio*

Figure 2.34, “ Workflow app main view ” [48] shows the Workflow App in the overview. You see one open workflow with some detail information.

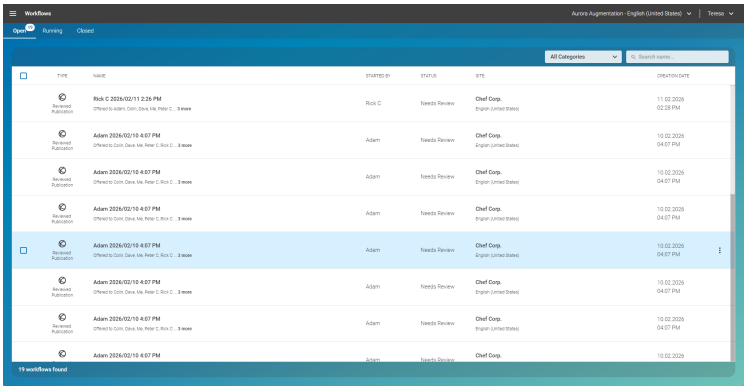


*Figure 2.34. Workflow app main view*

In this view, you get an overview of all open, running or closed workflows. You can search for workflow names, by using the search field in the top right corner. In order to search for a workflow, you will have to submit your search by pressing <ENTER> on your keyboard. You can also right-click on a workflow and either select **Open** or **Abort and destroy** from the context menu.

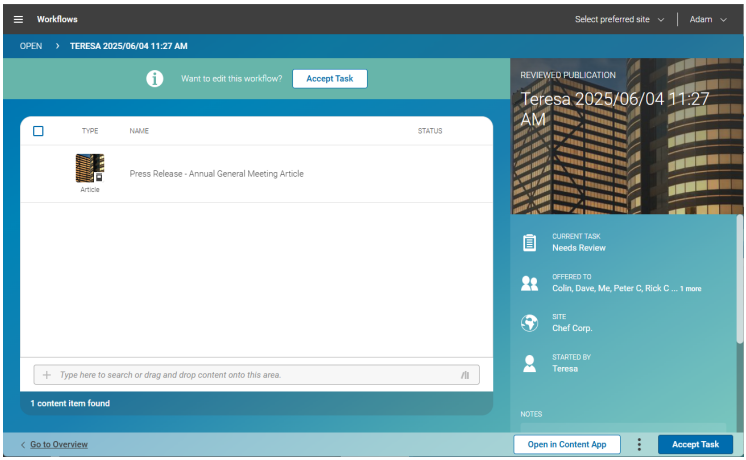


*Figure 2.35. Opened workflow in Workflow app*

In an opened workflow, you can, for example, open the included content in the Content App of Studio. If you do so, then the Workflow App opens together with the Content App in a split-screen mode.

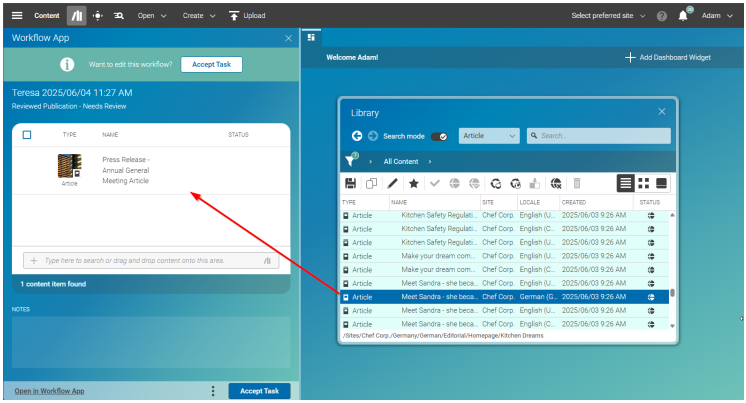


*Figure 2.36. Workflow App in split-screen mode with Content App*

# 2.4.3 Keyboard Shortcuts

*CoreMedia Studio* can be used via keyboard shortcuts in order to speed up your work. You will find a list of all supported shortcuts in the *Preferences* window of *Studio*.

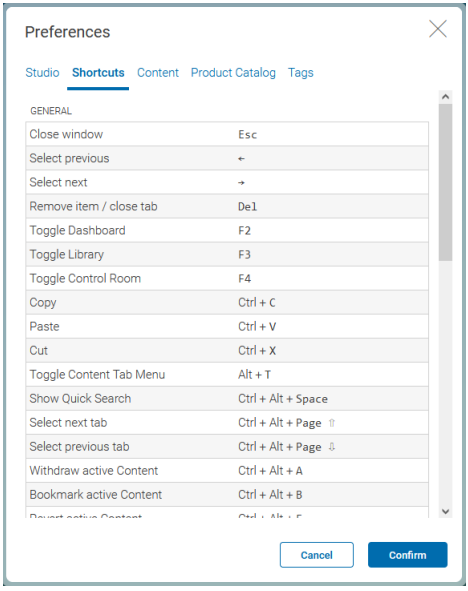


*Figure 2.37. Studio shortcuts*

# 2.5 Permissions and Rights

*Editorial user*

*CoreMedia CMS* provides a powerful and complex rights system for access management. However, as a *Studio* editorial user, you need to keep only five points in mind:

- Content items may exist, but they are invisible to you because of your permissions.
- Content items may exist that you can see but not edit.
- Links to content items may be displayed, but you may be unable to view or edit the actual content. Instead of the content name you will see the lock icon and a text "Element name not visible".
- Content items may exist that you may not publish.
- Content items may exist that you cannot edit, because they are currently being edited by another user.

| Icon | Meaning |
| --- | --- |
| | No rights |

*Table 2.4. Rights icons*

*Administrative user*

For administration of users and groups, you need to know the meaning of rights and rules and groups. See Section 3.15, “User Administration” in *Content Server Manual* for a more comprehensive and technical description of rights, rules, users and groups.

*Rights*

Rights define certain permissions on CoreMedia resources, to edit or publish content, for example. All the rights attached to a certain resource define a so called rule. Figure 2.38, “ Rules attached to a group ” [52] shows some rules attached to the global-manager group. The group has, for example, Read, Edit, Delete, Approve and Publish rights on content of type `Settings` below the `/Settings/Options/Bundles` and `/Settings/Options/Settings` folders.

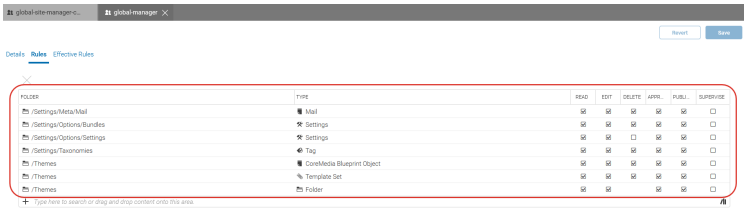


*Figure 2.38. Rules attached to a group*

*Inheritance of rules in groups*

Groups have rules attached and can be members of other groups. A group which is a member of another group has all the rules of its parent groups. However, when a subgroup defines its own rules on a resource, this definition overwrites the definition from the parent group. You can check all the rules that apply to a group in the *Effective Rules* tab.

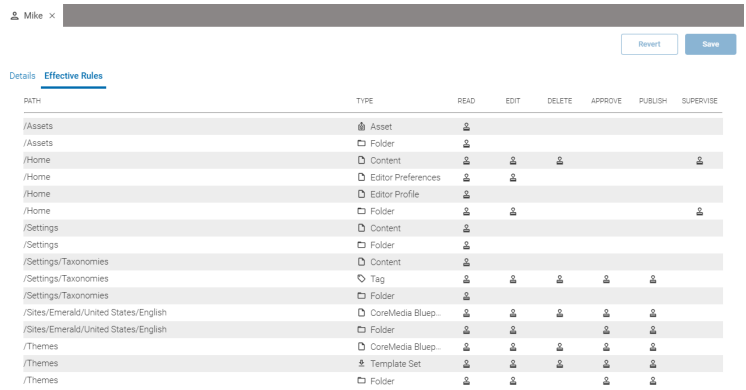


*Figure 2.39. Check effective rules*

If a rule is applied to content types in a directory, the current rights structure for the particular group is passed on to the content items in subdirectories. If another rule should apply in a subdirectory it has to be created explicitly for the particular content types. For available rights and their impact see Section 3.15.2, "User Rights Management" in *Content Server Manual*.

If a user possesses different rights for a resource due to belonging to multiple groups, these rights are additively combined.

Example:

| User | Group | Directory | READ | EDIT | DELETE | APPROVE | PUBLISH | GRANT | FOLDER |
|---|---|---|---|---|---|---|---|---|---|
| UserA | Sport | /News | x | | | | | | |
| UserA | Politics | /News | x | x | x | | | | |

*Table 2.5. Example groups*

User A has READ, EDIT and DELETE rights for the CoreMedia directory `/News`, since the rights of the groups add.

A user can be a member of several groups and inherits all rules of these groups. You can check all the rules that apply to a user in the *Effective Rules* tab. *Users and groups*

| Right | Description |
|---|---|
| READ | Read content names, content items content and folder names. |
| EDIT | Create, check out, check in, rename, move and save content items. Create subfolders, rename, move and delete a folder. |
| DELETE | Mark and unmark a content item for deletion, move an item to trash. For folders, you can not set the DELETE right, because it is included in the EDIT right. |
| APPROVE | Approve, disapprove a content item or folder. |
| PUBLISH | Publish a resource. |
| SUPERVISE | Check in a content item from a different user, grant new rights. |

*Table 2.6. Group rights*

# 2.6 Versions

As you would expect from a Content Management System, *CoreMedia CMS* is able to manage several versions of a content item. Each time, when you check out a content item and apply the changes, a new version will be created. You can see the version history of a content item in the *System* tab of the Form. The date in the first column of the *Editing History* table is the creation date of the version. You can also compare two versions (see Section 4.6.2, "Comparing Versions" [173] for details)

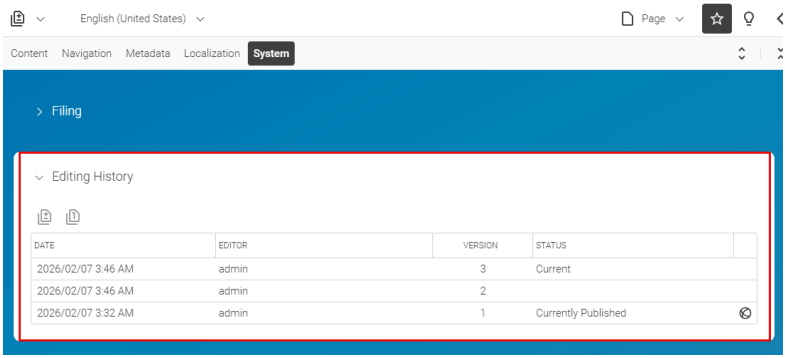


*Figure 2.40. Editing history of a content item*

When you select a previous version in the *Editing history*, you can create a new version based on the older one (see Section 4.6.1, "Checking out and Checking in Content Items" [171] for details). However, you can not directly change a previous version.

# 2.7 Notifications

*CoreMedia Content Cloud* shows notifications in case of special events. For example, users receive a notification when a project is shared with them. Notifications are also sent to users who are allowed to accept and perform tasks of built-in workflows. The number in the notifications box shows the number of new notifications. With a click on the underlined text, you can open the related content.

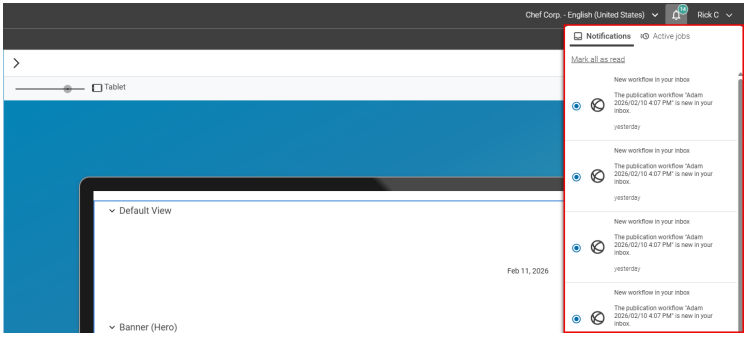


*Figure 2.41. Notifications*

# 2.8 Validators

To ensure that a content item contains all necessary content, *CoreMedia Studio* supports validators. Validators check if a field fulfills specific conditions. For instance, if a title has been set or a link list contains links to a valid content item. If a condition is not fulfilled, an error or warning is shown, depending on the configuration of your system. You have to correct an error, because otherwise the content item can not be saved or approved (depends on your configuration). You might ignore a warning.

A field with an error will be encircled in red while a field with a warning uses orange. Figure 2.42, "Validators in the Form" [56] shows all GUI elements, used with validators.

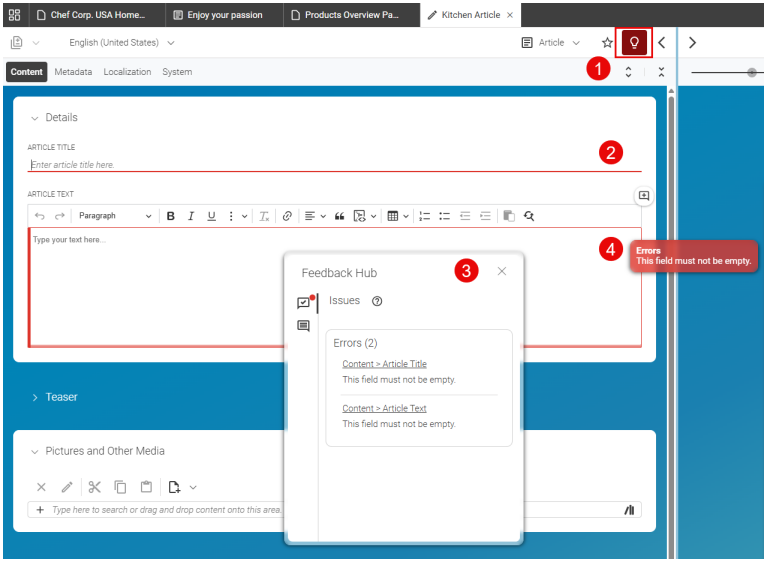


*Figure 2.42. Validators in the Form*

1. The icon (1) opens the list with all errors and warnings in the Feedback Hub (3). If there is an error or warning in the current content item, then the icon will be underlined.
2. The faulty field is encircled or underlined in red or orange.
3. The list shows all errors and warnings of the current content item. A click on the underlined text leads you to the faulty field. You can use the list to comfortably complete the mandatory fields of a content item.

4. If you hover with the cursor over the faulty field, a tooltip shows the cause of the error or warning.

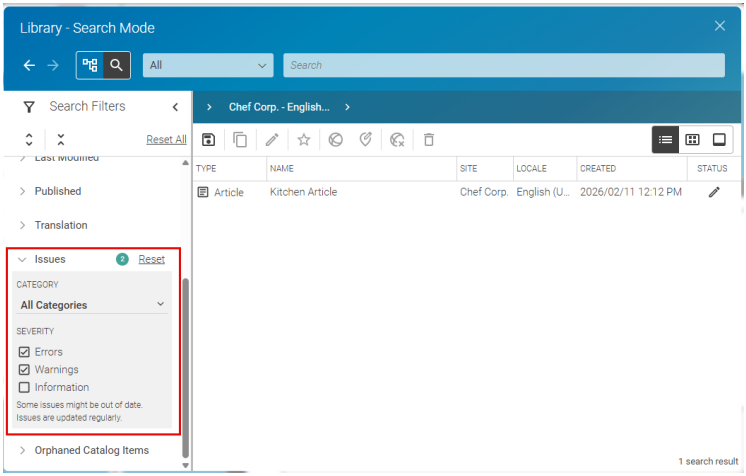


*Figure 2.43. Searching for issues in content*

You can use the search view of the library to find content items with errors or warnings along with their categories. The "Issues" section of the filter panel makes it possible to filter search results accordingly. See Section 4.3.6, “Navigating in the Library” [138] for details how to use the search view. Note however, that search results cannot always be up-to-date for all validator types, and that the "Issues" filter section only appears if indexing has been enabled for errors and warnings. The correct state for a content item is always visible in the Form View and in the Feedback Hub.

# 2.9 Workflows

### Deactivate pop-up blocker

When you use Studio with Firefox it might be necessary to deactivate your pop-up blocker in order to avoid usability issues with the Workflow app. See Section 3.2.2, "Deactivating Pop-up Blocker in Firefox" [80] for details.

With workflows you can publish, translate or synchronize content items or projects in an ordered process. One editor starts the workflow and another editor (or the same) proceeds. You can keep track of the state of a workflow and see all finished workflows. Workflows are managed in the Control Room (see Section 2.4.1.1, "Control Room" [29]) and the Workflow app (see Section 2.4.2, "Workflow App" [47]).

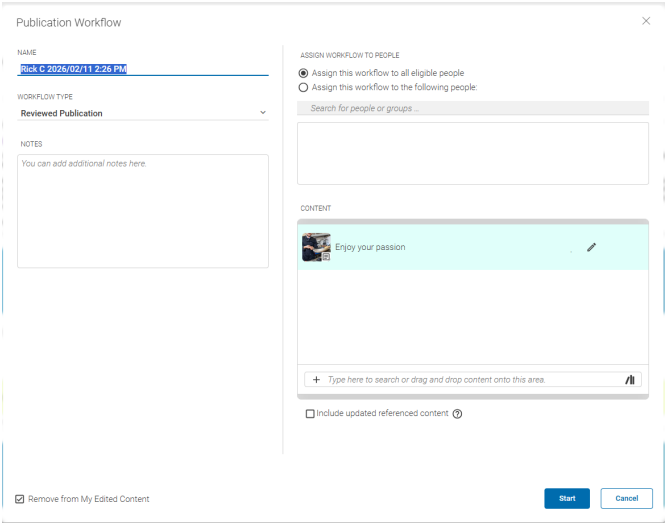


*Figure 2.44. Starting a publication workflow*

*CoreMedia Studio* supports the following workflows:

- Direct publication

  When starting the workflow, the content is automatically published.
- Reviewed publication

When starting the workflow, it is offered to other users who have to approve the content before it is published. You can either select specific users or groups or it is offered to all users with the appropriate rights.

- Translation

  When starting the workflow, it is offered to you and others. The only exception is when you, as local site manager, start a workflow for translating master contents directly to your preferred site. In this case the workflow is directly assigned to you and you cannot offer it to anyone else. After accepting the workflow you can either send the content to a translation agency, translate it manually or do not translate it at all.

- Synchronization

  When starting the workflow, the changes of the content are automatically propagated to the synchronized content.

The Control Room is the GUI where you can start and abort workflows while the Workflow App is the place where you manage your workflows.

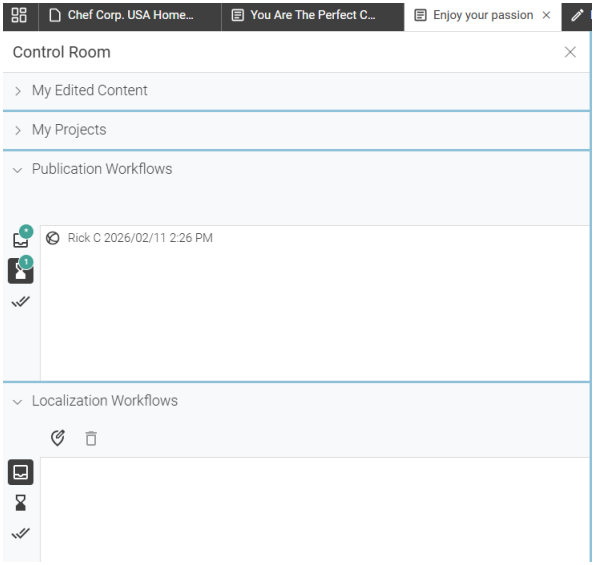


*Figure 2.45. Starting your workflows in the Control Room*

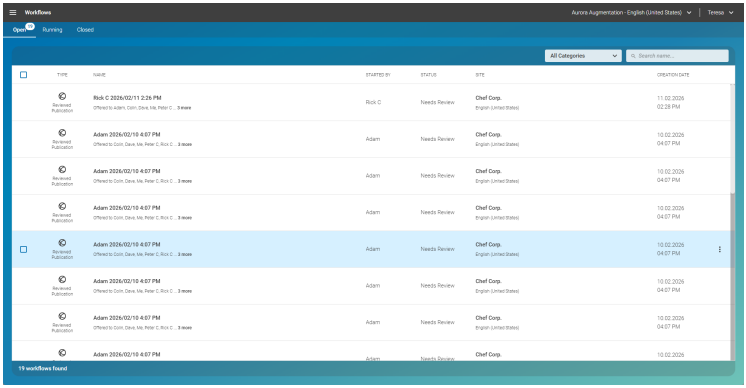


*Figure 2.46. Managing workflows in the Workflow App*

## Starting Workflows

Publication and localization workflows can be started using the toolbar or context menu buttons in the Control Room panels or the Library. Alternatively content can simply be dragged and dropped into the *Publication Workflows* or the *Localization Workflows* panel in the Control Room.

| Icon | Name |
|---|---|
| | Start a publication workflow |
| | Start a localization workflow |

*Table 2.7. Icons for starting workflows*

# 2.10 Multi-Site and Multi-Language

*CoreMedia Content Cloud* supports you in managing several sites in different locales in one CMS instance. So you can, for example, manage your worldwide shops or websites in all languages, or handle separate shops or sites for separate customer groups.

*Site location and identifier*

Site content is stored in separate folders below the `Sites` folder. A special content item of type `Site Indicator` located in each site folder identifies the site.

*Preferred Site*

As an editor, you can select a preferred site from the site selector (1) (see Section 3.3.9, “Selecting a Preferred Site” [88]). This preferred site is the place where most of your work takes place. When you create new content, for example, the default paths will be in the preferred site. The preferred site has also a prominent place in the Library as is shown in Figure 2.47, “Preferred site in the Library” [61]. (1) shows the selected preferred site in the site selector. In the tree view, the preferred site is shown in the root hierarchy of the tree (2). The bread crumb navigation also starts with the preferred site (3). You can still access the other sites (when you have appropriate rights) below the Sites folder (4). There, you will also find the folder of your preferred site (5) but it is empty and just links to the preferred site folder (2). When you switch the preferred site in (1), all preferred site locations shown above will switch to the newly selected preferred site.

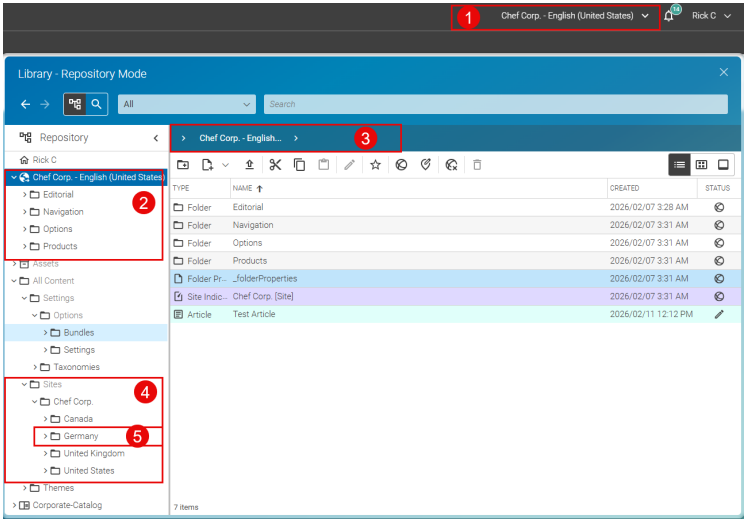


*Figure 2.47. Preferred site in the Library*

*Language of a site*

Each site has a locale attached, where a locale is a combination of language and country, for example English and USA. This locale will be used for translation, for instance.

*Master content*

In order to support sites with the same content in different locales, you can link content to a master content using the *Master* link list in the *Localization* tab. This connection is used in the Side-by-side view and for the translation and synchronization workflow by the system.

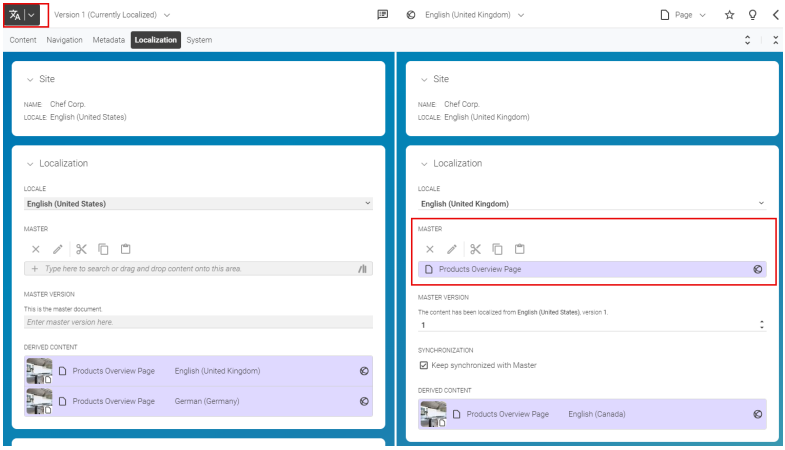


*Figure 2.48. Side-by-side view showing the master relationship*

*Deriving sites*

*CoreMedia Content Cloud* supports the site concept with the *Sites App*. You can use it, to get an overview over the existing sites and to create a copy of an existing site with another locale (see Section 4.7.4.1, “Preparing Translation: Deriving a Translated Site” [263] and Section 4.7.5.1, “Deriving a Synchronized Site” [278] for details).

*Translated and synchronized site*

Here, you can distinguish between a translated site and a synchronized site. A translated site contains the content of the Master site translated into another language, while the synchronized site contains the same content as the Master site. And, as the name suggests, the synchronized site keeps in sync with changes of the Master site. Translated sites and synchronized sites have different icons in the *Sites App*.

| Icon | Name |
| --- | --- |
| | Translated site |

| Icon | Name |
| --- | --- |
| | Synchronized site |

*Table 2.8. Site icons*

*Deep copy of content*

To derive a site means that all content of the parent site is copied into a new site folder. All links between the copied content items are changed so that they lead to the copied content and not to the parent content (deep copy). The parent contents are each set as the master content for their corresponding translated or synchronized content.

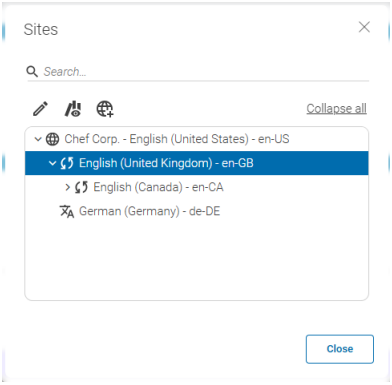


*Figure 2.49. Sites Window*

For additional information you can read Section 5.5, "Localized Content Management" in *Blueprint Developer Manual* and especially "Terms" for Localized Content Management in *Blueprint Developer Manual* . Also have a look into the Multi-Site Manual. The manual describes different options to design your site hierarchy and gives some guidance to avoid common pitfalls when working with multi-site content.

# 2.11 Personalization

*Native Personalization* is a CoreMedia plugin and allows you to present content to your users depending on some characteristics of these users. These characteristics might be of a more general nature such as the browser used or the current time or more specific (especially when the user is logged in) such as the age of the users or their interests.

See Chapter 7, *Working with Personalized Content* [368] for more details on Adaptive Personalization.

# 2.12 Elastic Social

*Elastic Social* is a CoreMedia module and allows you to manage users and user generated content, that is comments, reviews and the like. It extends *CoreMedia Studio* with two UIs for comment and user management. See Chapter 7, *Working with Personalized Content* [368] for details.

# 2.13 Product Catalogs

*CoreMedia Content Cloud* supports work with two product catalogs:

- With *Brand Blueprint* you can use a product catalog maintained as content in the CoreMedia repository.
- With eCommerce Connectors you can use catalogs from the commerce system.

## 2.13.1 Local product catalog

The local product catalog bases on the content types `Product` and `Category`. You can use the Library to build your product hierarchy.

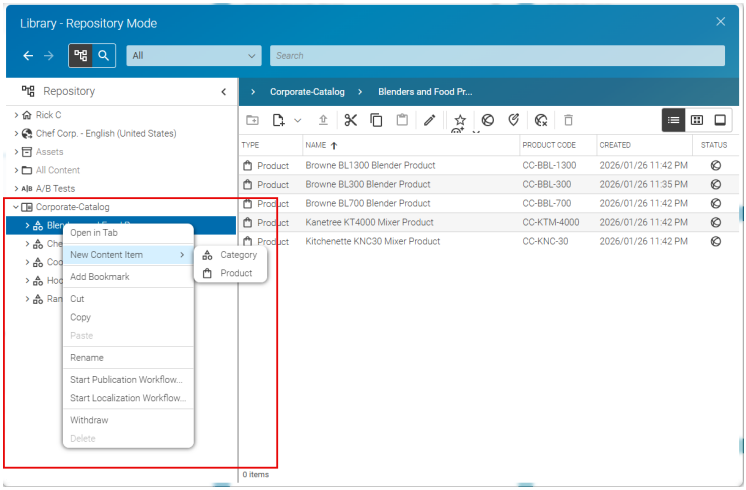


*Figure 2.50. Studio with local catalog items*

## 2.13.2 Commerce Integration

eCommerce Connector feature

*CoreMedia Content Cloud* is a product that integrates with commerce systems in order to let you create engaging and inspiring web shops. To do so, you need the eCommerce Connectors. You can use the *CoreMedia Studio* Library to access eCommerce content and add it to your website via placeholder content items. Create, for example, a Product Teaser content item and drag a Product from the commerce system into this teaser. Now, you can add it to your page and you will see the Product information in your CMS site.

In the other direction, you can augment eCommerce system pages with content from the CMS. For example, images, videos or PDF documents.

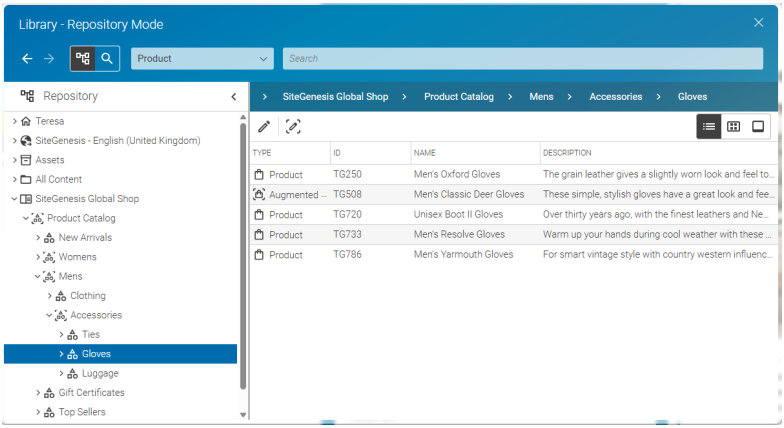


*Figure 2.51. Library with eCommerce content*

## *Connector for HCL Commerce* specific features

*HCL workspaces*

If you use the Workspaces feature in *HCL Management Center* you can select your current workspace in *CoreMedia Content Cloud* and will see this data in the CoreMedia system.

*HCL multiple catalogs*

In *Studio* with the *HCL Management Center* you can work with multiple commerce catalogs as shown in Figure 2.51, “Library with eCommerce content” [67]. One of the catalogs is the default catalog. This is important when you search in eCommerce content, because by default you will only search in the default catalog. When you want to search in another catalog, you have to select the catalog folder and search below this folder.

Because catalogs can contain the same products or categories, *Studio* shows you the catalog name, for example in the tooltip of a tab.

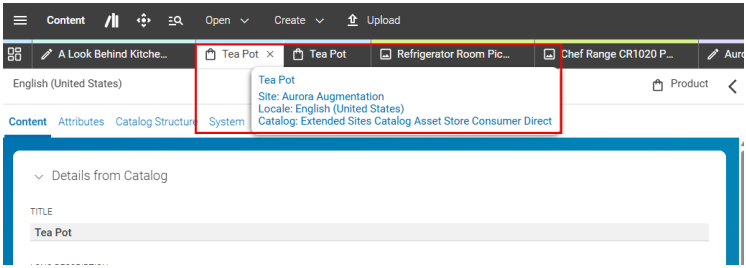


*Figure 2.52. Tooltip with catalog name*

When you augment a product, the augmentation is catalog specific. This means that the augmenting content appears only in the product page under this specific catalog. However, when you add an image, video or document to a product, this content appears for the product in all catalogs.

*Personalization and time dependent visibility*

You can also define content that is only shown when specific conditions are fulfilled. For example, when the website user is member of a commerce segment or at a specific time. These settings are done in the *CoreMedia Content Cloud* system but are also recognized in commerce sites that integrate this CoreMedia content.

# 2.14 Asset Management

*CoreMedia Advanced Asset Management* allows you to store and manage your digital assets (for example, high-resolution pictures of products with different renditions) and corresponding license information in the CoreMedia system.

*Definition of a rendition*

A rendition is a derivative of the raw asset, suitable for use in output channels, possibly with some further automated processing. A rendition might be, for example, a cropped and contrast-adjusted image in a standardized file format whereas the original file might be stored in the proprietary format of the image editing software in use.

# 2.15 In-App Guide Portal

NOTE

The In-App Guide Portal is activated via a Blueprint plugin and might not be installed by your company. Also, you have to allow data tracking to get guides in Studio. See Section 3.8, “Usage Tracking” [120] for details about tracking and guides. In this section, we assume that the plugin is installed.

CoreMedia integrates a Guide Portal in Studio which offers you in-app guides for specific tasks, informs you about new Studio or CoreMedia features and allows you to provide feedback to CoreMedia.

## Activating the In-App Guide Portal

In-App Guides need activated data tracking due to technical limitations. You can activate both at once. See Section 3.8, “Usage Tracking” [120] for details about data tracking.

1. When you log in for the first time, data tracking is not activated, and you will see a screen, where you can enable in-app guides and data tracking. Simply click *Enable In-App Guides* and then click **[Save]**. This will also activate data tracking.

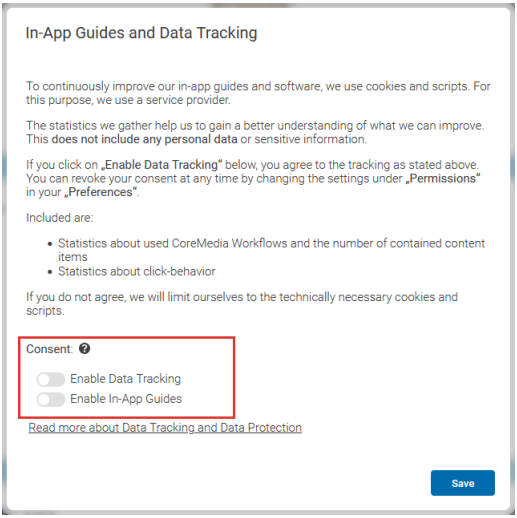


*Figure 2.53. Initial activation window*

2. When you have skipped the in-app guide activation at your first login, and now want to activate in-app guides, open the *Preferences* menu.

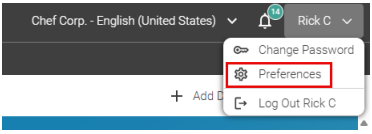


*Figure 2.54. Open Preferences Menu*

3. In the *Preferences* menu, select the *Permissions* tab.

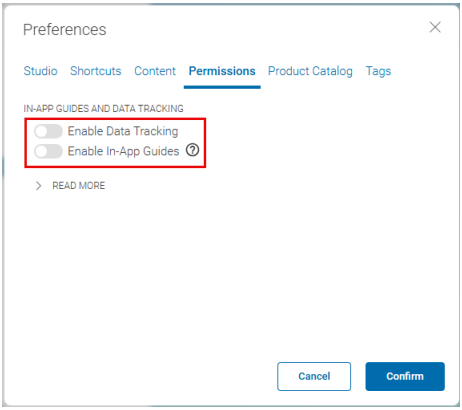


*Figure 2.55. Preferences Menu*

4. Click *Enable In-App Guides*. This enables the in-app guides. When not already done, this will also activate data tracking. Click *Confirm* to save your changes and to close the *Preferences* dialog afterwards.

Now, in-app guides and the *In-App Guide Portal* are enabled in your Studio. You can now learn about Studio components, get help with specific tasks, learn about new Studio features, and provide CoreMedia with Feedback for further improvements of Studio and the guides.

## Deactivating the In-App Guide Portal

As above, open the *Preferences* dialog, select the *Permissions* tab and deactivate the *Enable In-App Guides* switch. The guides will also be deactivated when you deactivate data tracking.

## Opening the In-App Guide Portal

1. Click the question mark icon in the top-right corner of Studio.

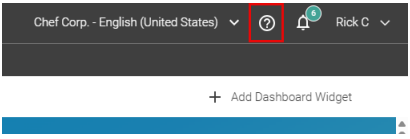


*Figure 2.56. Open In-App Guides Portal*

This opens the *In-App Guides Portal*.

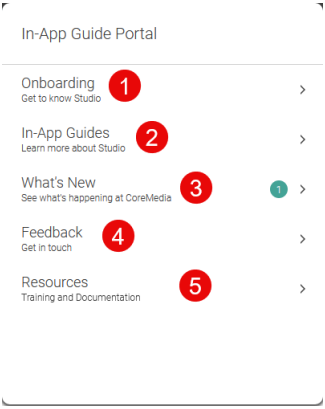


*Figure 2.57. The In-App Guides Portal*

## The In-App Guide Portal

The In-App Guide Portal has five sections as shown in Figure 2.57, "The In-App Guides Portal" [73]:

**Onboarding (1)** Here, you find guides that introduce you into Studio and that describe main parts of Studio, for example, the Library or the Preview.

**In-App Guides (2)** Here, you find guides that describe tasks you might want to achieve. For example, how to derive a site or the usage of taxonomies.

**What's New (3)** Here, you will get the latest news concerning Studio. For example, when Studio has got new features. The small number besides the *What's New* entry shows, as always in Studio, the number of unread messages.

**Feedback (4)** Here, you can give us feedback, so that we can improve Studio and the guides. You can recommend guides you want to have, rate the existing guides and give us feedback about Studio.

You can also give us feedback, after you have finished a specific guide.

**Resources (5)** Here, you get links to our other user related resources, such as our comprehensive documentation or the enablement center.

## Using Guides

Guides will lead you through specific tasks or describe features of Studio components, such as the Library. Guides cannot control Studio on their own. So, you either have to perform an action, such as opening the library

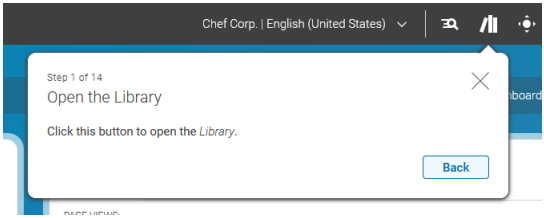


*Figure 2.58. Perform an action to proceed*

or to click **[Start]** or **[Next]** in a guides' step. Sometimes, you have to perform an action **and** also click **[Next]** to proceed. The guide step describes exactly what to do.

You can go back to the last step by clicking **[Back]**.

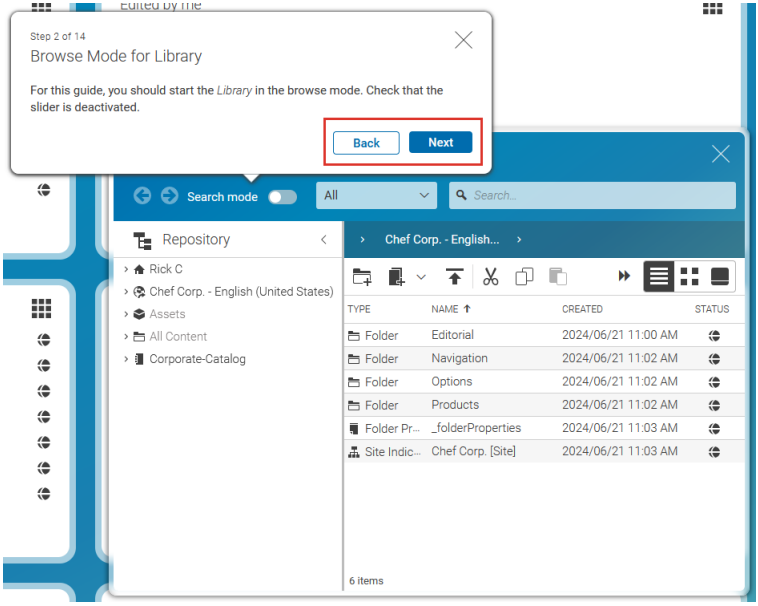


*Figure 2.59. Click Next to proceed*

You can always leave a guide by clicking the X icon of a guides' step.

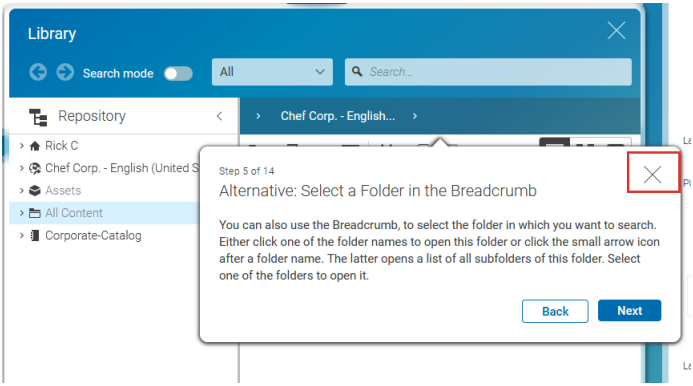


*Figure 2.60. Leave a guide*

When you have reached the end of a guide, you can simply leave the guide by clicking **[Finish]** or give us feedback by clicking **[Rate this Guide]**.

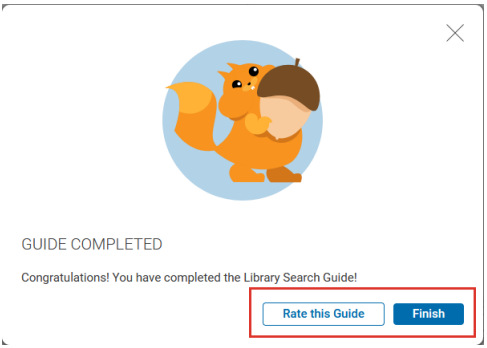


*Figure 2.61. Give us feedback*

Your feedback is invaluable and drives us to continuously enhance both the guides and the studio experience.

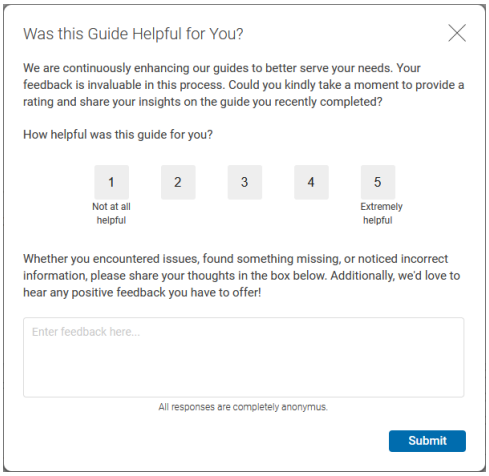


*Figure 2.62. Feedback Form*

# 3. Administration

This chapter describes some administrative tasks, such as the preparation of your browser and changing settings in *CoreMedia Studio*.

# 3.1 Studio Hardware Requirements

## Minimum Screen Requirements

In order to fulfill all tasks of an occasional user, CoreMedia recommends the following configuration:

- Desktop monitor: 1920x1080 pixels screen resolution, 24" screen diagonal
- Notebooks: 1280x800 pixels screen resolution, 13-15" screen diagonal

## Recommended Screen Requirements

For a comfortable and ergonomic work experience, CoreMedia recommends the following configuration:

- 2560x1440 pixels screen resolution, 27" screen diagonal

## Further Requirements

- *CoreMedia Studio* has no demanding requirements for the graphics card
- A standard CPU with >2GHz clock speed. Higher clock speed and cache size should be superior to multi-cores.
- Memory: 8GB minimum, 16GB recommended
- Browser: CoreMedia experience shows that Chrome and Internet Explorer/Edge have the fastest JavaScript engines for *Studio*

# 3.2 Preparing the Browser

Before you start working with *CoreMedia Studio* for the first time, you might have to configure some settings of your browser. The next chapters describe the following settings:

- Enable spell checking

## 3.2.1 Spell Checking

All today's modern browsers have their own spellchecker integrated that can be used for spell checking in *CoreMedia Studio*. One exception is Microsoft Internet Explorer, here spell checking can not be used with *CoreMedia Studio*.

### Changing language

Right click in a richtext field of *CoreMedia Studio*. The context menu opens up.

1. Select the menu item **Language**. If no languages are listed, then no dictionary is installed. Select **Add Dictionaries...** and install the required dictionaries.
2. Select the language that should be used for spell checking.

Now, spell checking is done with the newly selected language.

### Getting suggestions and adding words to the user dictionary

Wrong or unknown words are marked with a red wavy line. To get a spelling suggestion or to add the word to a user dictionary, right click the word. Select a suggestion from the context menu or add the word to the user dictionary.

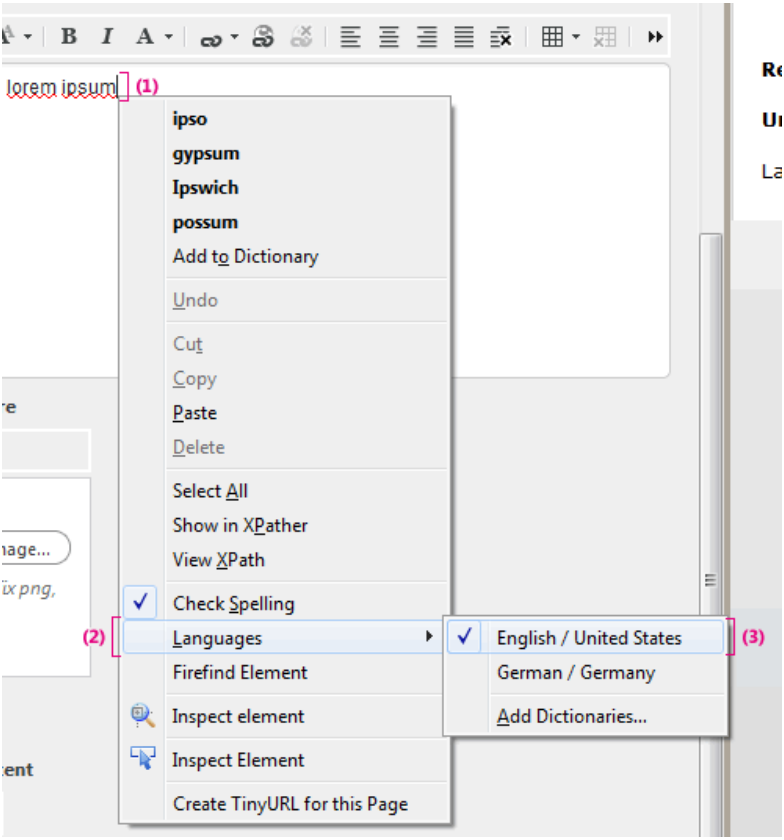


*Figure 3.1. Enabling spell checking*

## 3.2.2 Deactivating Pop-up Blocker in Firefox

When you use Studio with Firefox, you must deactivate the pop-up blocker or add an exception for the Studio URL. Otherwise, you might have usability issues with workflows. For example, when you have the Content App and Workflow App both open in separate tabs, and you click on the link in a notification for a new workflow in the Content App, then Studio will not switch to the Workflow App. In order to deactivate the blocker, proceed as follows:

1. Open the Firefox application menu (the three dashes in the right upper corner) and select the **Settings** menu entry.
2. In the settings window, select *Privacy & Security* and go to the *Permissions* section.

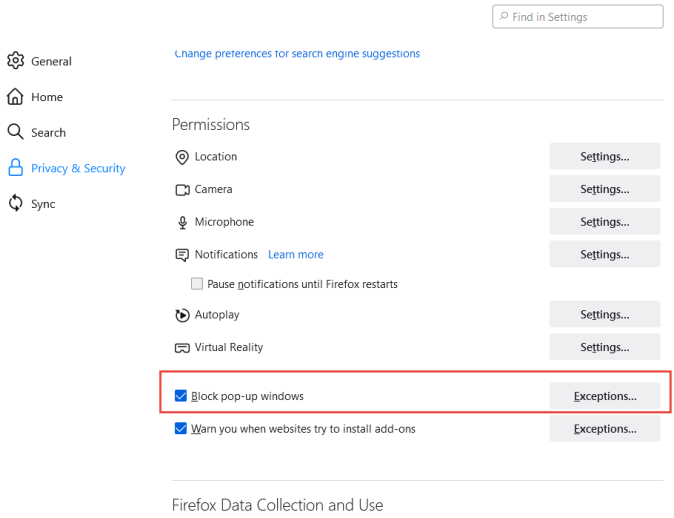


*Figure 3.2. Editing Permissions in Firefox*

3. Either deselect the *Block pop-up windows* checkbox to completely deactivate the pop-up blocker or click the **[Exceptions...]** button and add the Studio URL as an exception.

# 3.3 Changing Settings

You can change general settings, such as the language, or more specific settings, such as settings for *Elastic Social* in *CoreMedia Studio*:

- Section 3.3.1, "Changing your password" [82] describes how you change your password.
- Section 3.3.2, "Changing the language of the GUI" [83] describes how you change the language of the GUI.
- Section 3.3.3, "Remove Site Chooser Button" [83] describes how you change the contents of the User Menu button.
- Section 3.3.4, "Configuring the Behavior of the Publish Button" [84] describes how you change the behavior of the publish button in the Action toolbar.
- Section 3.3.5, "Enabling Colorful Content Type Representation in Studio" [85] describes how you enable the colorful representation for content types.
- Section 3.3.7, "Disabling the Highlighting of Preview Content on Mouseover" [87] describes how you disable the highlighting of preview content.
- Section 3.3.8, "Configuring Scrollbars in the Device Preview" [87] describes how you select scrollbars for the device preview.
- Section 3.3.9, "Selecting a Preferred Site" [88] describes how you select your preferred site.
- Section 3.3.10, "Configuring a Warning for Large Content Operations" [89] describes how you can handle unintended large content operations
- Section 3.3.11, "Configuring Available Comment Categories" [90] describes how you configure available comment categories for Elastic Social
- Section 3.3.12, "Configuring Workflow Validation" [91] describes how to configure validation for workflows, and possibly even disable it
- Section 3.3.14, "Configuring *Elastic Social*" [96] describes how you change settings in *Elastic Social*.
- Section 3.3.15, "Editing Mail Templates" [97] describes how you change the mail templates that are sent from *Elastic Social*

## 3.3.1 Changing your password

In order to change your password, proceed as follows:

1. Open the *User Menu* and select **Change password**. Alternatively, you can open the **Main** menu and select **Change Password**.
2. A window opens up where you have to enter your old password and the new password twice.
3. Click **[Confirm]** .

Your password has changed.

Alternatively, an administrator can change the password in the User Manager.

1. Open the **Main** menu and select **User Manager**.
2. Select the user, for which you want to change the password, and open the detail view with a double-click.
3. Click **[Change Password]** in the detail view.
4. Enter the new password twice in the opening dialog and click **[Confirm]**.

You have changed the password.

## 3.3.2 Changing the language of the GUI

In order to change the language used in the GUI, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. The *Preferences* window opens up. Select the language from the dropdown box and click **[Confirm]**.

The *CoreMedia Studio* GUI now appears in the selected language.

## 3.3.3 Remove Site Chooser Button

By default, the site chooser button in the top right corner displays information about the preferred site (1) and the locale of the preferred site (2). You can use it to select your preferred site and to switch between sites.

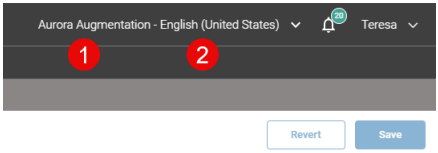


*Figure 3.3. Site Chooser button with information*

In order to remove the chooser, proceed as follows:

1. Open the *User Menu* and select **Preferences**. Disable the **Show preferred site selector in application header** checkbox.

The site chooser button is now removed from the Header.

# 3.3.4 Configuring the Behavior of the Publish Button

By default, the publish button in the Action toolbar starts a publication workflow with the currently selected content. The behavior was different in older CoreMedia versions. You can reactivate the old behavior in the *Preferences* window.

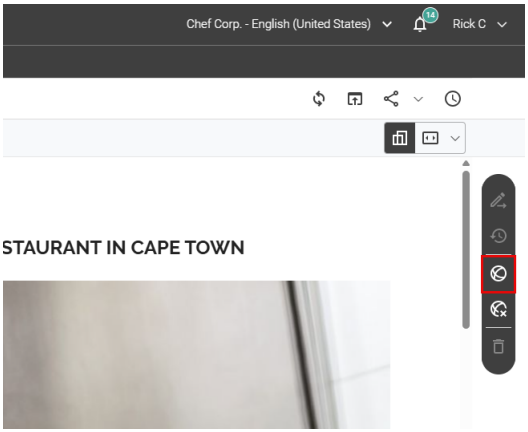


*Figure 3.4. Publish button in the Action toolbar*

**Old behavior** — All content in the *My Edited Content* area of the Control Room will be added to the publication workflow. The publish button shows the number of content items contained in the *My Edited Content* area.

**New behavior** — Only the currently selected content item will be added to the publication workflow.

In order to activate the old behavior, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. Open the *Content* tab.

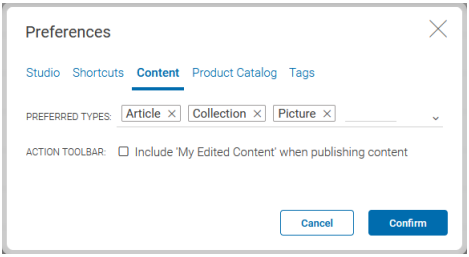


*Figure 3.5. Change behavior of the publish button in the Action toolbar*

3. Select the *Action Toolbar* checkbox.
4. Click **[Confirm]**.

Now, you have reactivated the old behavior. All content from the *My Edited Content* area is added to the publication workflow.

## 3.3.5 Enabling Colorful Content Type Representation in Studio

A more colorful representation of various *Studio* components can be enabled to make it easier to distinguish between different content types. If enabled, different contents in *Studio* tabs, lists, menus and in the library will be displayed in color groups.

NOTE

Please note, that this feature is experimental. CoreMedia reserves the right to change or remove it in future *Studio* releases.

Enable this feature as follows:

1. Open the *User Menu* and select **Preferences**.
2. Enable the checkbox *Show Content Type Groups in Color*.

## 3.3.6 Configure Preferred Types

By default, the repository toolbar and search bar provides a menu with all types of content to create or to search for. In order to configure a list of preferred new

types, you may select a list of content types from a list that will appear at the top of the menu.

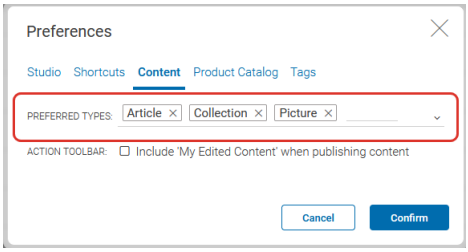


*Figure 3.6. Preferred Types New Content Selection*

The existing content types are still available, but will be moved to the submenu *All*.

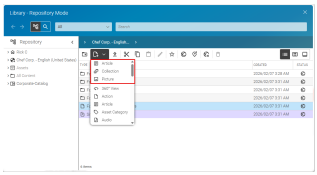

*Figure 3.7. Preferred Types in the New Content Menu (Library)*

Additionally, the selected content types will be added at the top of the 'Create' menu as well.

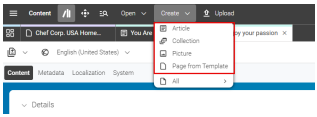


*Figure 3.8. Preferred Types in the Create menu*

The existing content types are still available in the list of all content types.

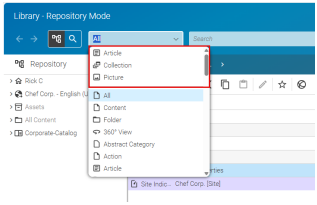


*Figure 3.9. Preferred Search Types in the Library*

Configure this feature as follows:

1. Open the *User Menu* and select **Preferences**.
2. Select tab *Content*.
3. Enter the name of the content types you want to add as preferred types for new content.

## 3.3.7 Disabling the Highlighting of Preview Content on Mouseover

The Preview highlights the selectable preview content on mouseover by showing a gray border around the respective element. To disable this behavior, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. In the *Studio* tab, disable the checkbox *Highlight Preview Content on Mouseover*.

## 3.3.8 Configuring Scrollbars in the Device Preview

*CoreMedia Studio* offers you a preview for different devices. You can select if the device preview should show a fixed part of the site or if there are scrollbars.

1. Open the *User Menu* and select **Preferences**.
2. The *Preferences* window opens up. Enable the checkbox *Show Scrollbars in the Device Preview*.

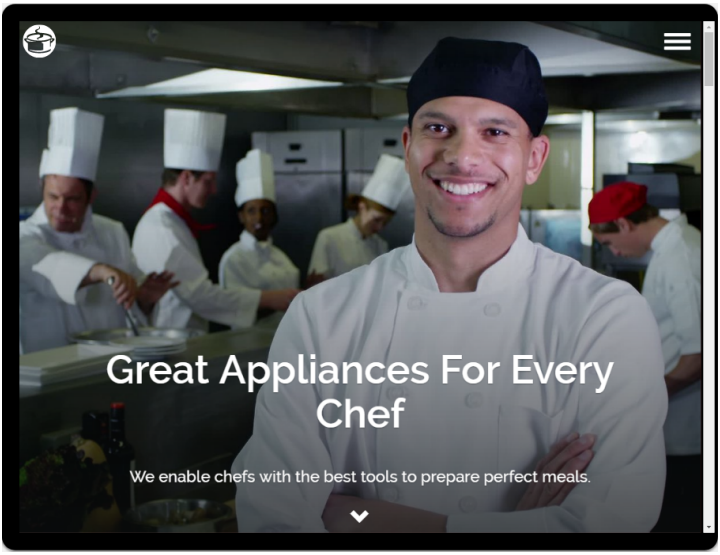


*Figure 3.10. Mobile device preview with scrollbars*

# 3.3.9 Selecting a Preferred Site

*CoreMedia Content Cloud* allows you to manage different sites. If you work in a specific site you can set this site as your preferred site. When you create new content, for instance, the path will then be set to the preferred site.

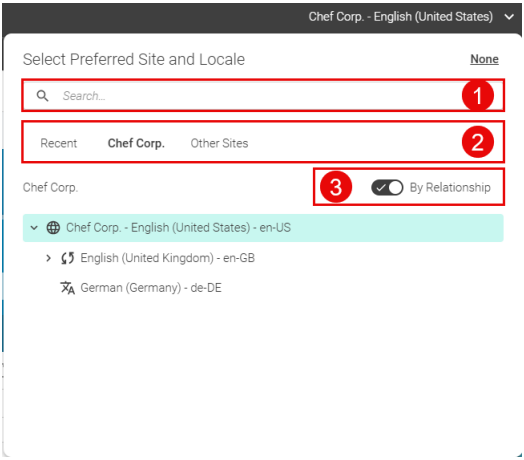


*Figure 3.11. Site selector*

In order to select a preferred site, proceed as follows:

1. Open the **Site Chooser** in the Header bar.
2. Select your site. You have several ways to find the required site: from the *Site* dropdown field. You can also search for sites in the search field.
   - Search for the site by name in (1).
   - In (2) Select either a site you have recently used, a language variant of the site you are currently using or other sites which you can access. With *By Relationship* (3) you can either sort the sites by language or by their relationship. That is, which site is a localized variant of another site.

# 3.3.10 Configuring a Warning for Large Content Operations

Large copy or move operations of content might be unintended. To reassure, that the operation is really intended, a warning is displayed, if the copy or move operation contains more than 1000 content items. This threshold can be configured per site or globally.

1. Open the or create the CMSettings content item `Content Creation`. Add an *Integer* property to the *Settings* Struct with name *largeOperationWarningThreshold* and appropriate value.

2. To configure the threshold globally, add the property to: `/Settings/Options/Settings/Content Creation`

   To configure the threshold for a site, change `/Sites/[Site]/[country]/[language]/Options/Settings/Content Creation`

# 3.3.11 Configuring Available Comment Categories

In the standard *Blueprint* project, a comment belongs to one or more categories determined in the following way:

- Each URL segment from the root Page down to the subpage where the comment's target is located is an individual comment category.
- Each tag that is attached to the comment's target is a comment category.

For example, a comment from an article with the URL page segments `/media/travel/europe/` belongs to the categories media, travel and europe.

In order to configure, which comment categories are available as filter options in the *Moderation View* (see Section Section 8.1.2, "Filtering the List of Moderated Items" [379]), the standard *Blueprint* project allows you to set the `filterCategories` property of the *Elastic Social* settings content. If this property does not exist, it has to be added as a link list property of the elasticSocial struct as shown in Figure 3.12, "Configuring available filter categories for comments" [90].

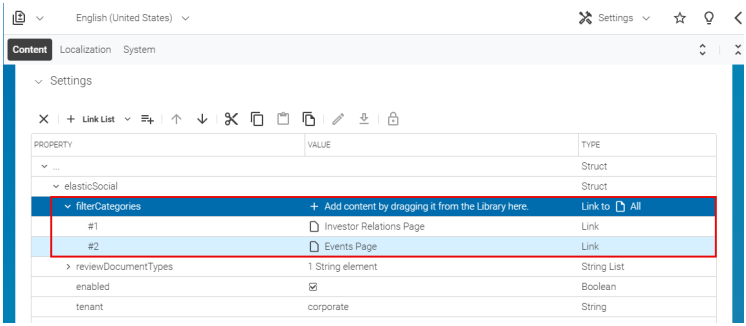


*Figure 3.12. Configuring available filter categories for comments*

Only linked Page and Tag content items take effect as available categories for filtering comments in the *Moderation View*. For example, to make available the filter option for the category *travel* in the *Moderation View* you have to add the *Travel* Page content item.

# 3.3.12 Configuring Workflow Validation

Just as validators can be applied to single content items as described in Section 2.8, “Validators” [56], workflows also perform validation. This validation acts as a *summary of all validation issues on the affected content items*. In addition, it ensures, among other things, that content items are in the required state before they are handed over to a workflow.

While workflow validators provide guidance to editors throughout the workflow lifecycle, most editors become aware of them when starting a workflow, no matter, if translation, synchronization, or publication. An example is shown in Figure 3.13, “Guidance by Workflow Validation” [91], where editors get a hint, that they may not continue starting their workflow because issues exist, that must be addressed first.

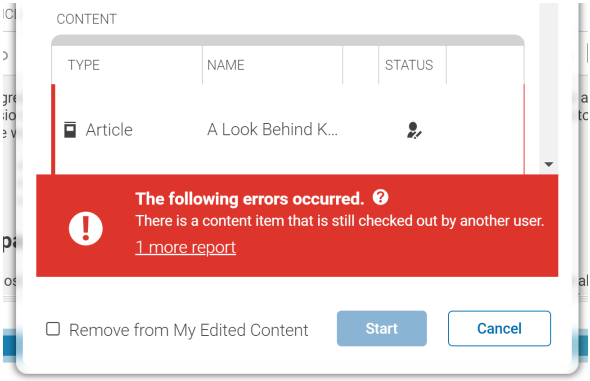


*Figure 3.13. Guidance by Workflow Validation*

In general the workflow validation behavior is configured as part of your deployed system. But there may be circumstances, where it is required or desirable to provide an adhoc customization. In this section, you will get to know where to apply these customizations and which customization options exist by default.

## 3.3.12.1 WorkflowValidation Settings

The workflow validation behavior may be customized with a settings content item at path: `/Settings/Options/Settings/WorkflowValidation`.

The content item ships with *CoreMedia Blueprint* workspace, similar as shown in Figure 3.14, “WorkflowValidation Settings” [92]. Any unavailable or unset values

use some fallback value, that may, for example, have been configured as part of your deployed system.

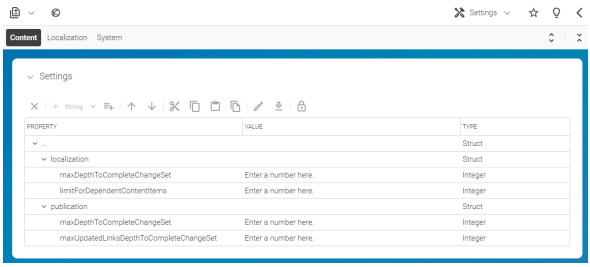


*Figure 3.14. WorkflowValidation Settings*

# 3.3.12.2 General Settings

On top-level, some general settings may be applied. Some workflow-specific settings are typically grouped by type. Find more details on these workflow-specific settings in the following sections.

## Disable Workflow Validation

In some processes, workflow validation may become unhandy. For example, if you have to deal with a huge set of content items for the first translation or publication to trigger. In these exceptional, cases it may be desirable to turn off the validation completely.

To disable the validation completely, add a Boolean property `disabled` at root level of your settings and activate it.

If disabled, all editors get a hint, that the validation is disabled currently, as, for example, when starting workflows as shown in Figure 3.15, “Hint for Disabled Validation” [92].

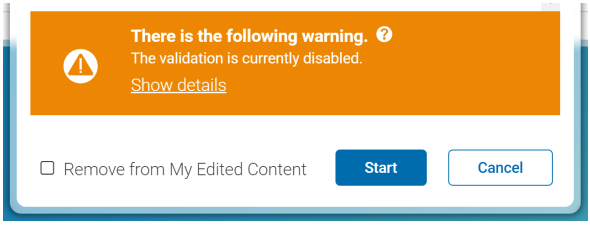


*Figure 3.15. Hint for Disabled Validation*

**Use With Care: Possible Unwanted Side-Effects**

The content items that would have automatically been added during validation will not be visible to the editors, and they will not be preprocessed by the Studio which might have an impact on the actual results of the workflow. These content items are no longer automatically checked in (translation / publication) or approved (publication). For publication workflows, also optionally included updated referenced content items will not be published.

Required extended content will still be added by the workflows, but as explained above, different versions might be used or workflows might even fail as no versions are present that fulfil the respective requirements.

Besides that, if you disable validation, editors may overlook highly relevant issues.

## 3.3.12.3 Localization Settings

Validation within localization workflows like Translation or Synchronization may be configured within a Struct named `localization`. Available configuration options are described below.

Prior to adapting configuration options, you may want to take a look at at Section 4.7.4, "Translating Content" [261] or Section 4.7.5, "Synchronizing Content" [277] for details on terms and concepts of localization workflows.

### Limit Dependent Content Preview: Size

For huge sets of content items, calculation of the preview of dependent content items may take a considerable amount of time. While the preview helps editors to understand possible consequences or issues when starting a localization workflow beforehand, the preview technically is not required: The localization workflows will evaluate dependent content items independent of this preview later on anyway.

To control the maximum size of evaluated dependent content items, you may set the Integer property `localization.limitForDependentContentItems` to some suitable value. A value of 0 (zero) will suppress dependent content items evaluation completely.

If a corresponding limit is configured (as system-configuration or within these settings) and hides dependent content items, editors will get a corresponding warning, that their preview of dependent content items may not be complete as shown in Figure 3.16, "Hint for Active Dependent Content Items Size Limit" [94]. The warning is not shown, if no dependent content items are left out, so that a reasonable high value may serve as protection only for huge workflows to start.

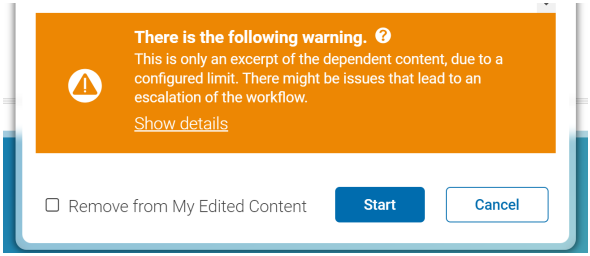


*Figure 3.16. Hint for Active Dependent Content Items Size Limit*

### May Override System Configuration

If set, this limit overrides a possibly existing system-configuration. Thus, it may conflict with limits carefully chosen beforehand. Ensure, to be aware of possible implications of such an adaptation.

Limit Dependent Content Preview: Depth

Similar to the setting `localization.limitForDependentContentItems` mentioned above you may configure the depth of dependent content item evaluation via Integer property `localization.maxDepthToCompleteChangeSet`.

If set, it controls how many subsequently linked content items are followed to fill the list with dependent content items. A value of 0 (zero) will prevent any dependent content items to be added. A value of 1 (one) will prevent any content items to be added to the preview of dependent content items, that are not linked directly from content items added explicitly to the workflow by your editors.

Just as for `localization.limitForDependentContentItems` the same warning is displayed, if dependent content items are not available in preview due to this limit. See Figure 3.16, “Hint for Active Dependent Content Items Size Limit” [94].

And just as for `localization.limitForDependentContentItems` any configured value will override configurations done on system-level.

## 3.3.12.4 Publication Settings

Validation within publication workflows may be configured within a Struct named `publication`. Available configuration options are described below.

### Limit Extension Of Content Items

The set of content items in the publication workflow window is extended automatically. Content items that are referenced by the current content items are followed recursively and are included in the following cases:

- A referenced content item has never been published, yet.

  These content items *must* be included in the publication to prevent dead links. The maximum depth for following these references recursively can be controlled with the setting `publication.maxDepthToCompleteChangeSet`.

  This limit applies only to the set of content items shown in the Studio. During the actual publication all references of this type are followed (up to a fixed hard limit). There is one difference, though: The content items that are shown in Studio are also automatically checked in and approved if necessary, when starting the workflow. This does not happen in the actual publication where the latest approved version would be used instead. If no such version exists, the publication will fail.

  If there are more referenced content items that are not shown due to this limit, a warning is displayed indicating that the shown set of content items is incomplete.

- A referenced content item has already been published in the past has been updated since then.

  These content items are only included if the checkbox *Include updated referenced content* is enabled. The maximum depth for following these references recursively can be controlled with the setting `publication.maxUpdatedLinksDepthToCompleteChangeSet`.

  This type of references is only considered in the Studio and not in the actual publication workflow. That means, if content items are not included here, because either the depth limit is reached or the validation is stopped, these content items will not be included in the publication.

  Like the other content items visible in the Studio, they will also automatically get checked in and approved if necessary, when starting the workflow.

  If there are more referenced content items that are not included due to this limit, a warning is displayed. You can still start the publication workflow. Note that the actual amount of included referenced content items might also be limited by the value of `publication.maxDepthToCompleteChangeSet`. Without going into details, it limits the overall evaluation while `publication.maxUpdatedLinksDepthToCompleteChangeSet` is applied at lower levels.

# 3.3.13 Configuring Warnings

*Studio* shows for some actions a warning (for example, when you deselect a site in the synchronization workflow which contains selected subsites) and also pop-ups. You can deactivate the warning in the dialog for the future.

In order to activate all warnings and pop-ups again, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. Select the *Studio* tab and click the **[Show dialog messages again]** button.

   You can activate pop-up messages accordingly.

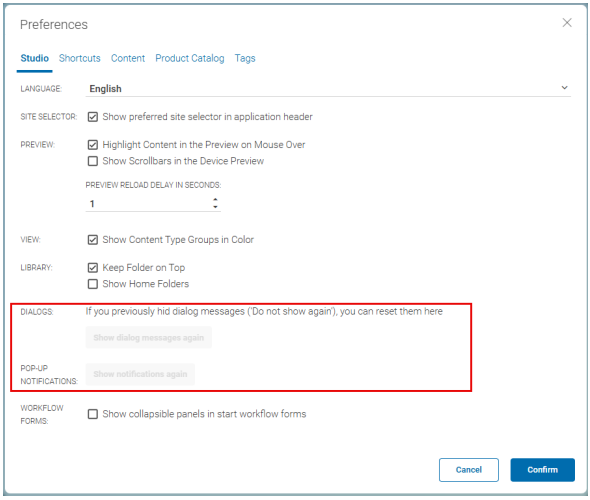


*Figure 3.17. Enable warnings again*

# 3.3.14 Configuring *Elastic Social*

You can configure the behavior of *Elastic Social* in *CoreMedia Blueprint* in detail using settings, which are stored as Struct properties. You can, for example, define which parts of your website should allow post-moderation or you can disable likes. You will find a complete list of all settings in the Section 6.3.1, “Configuring Elastic Social” in *Blueprint Developer Manual* .

1. Open the Page content item for which you want to edit the configuration.

2. Open the *Settings* tab of the form and scroll in the *Linked Settings* field to the *Elastic Social* entry and double-click the entry. This opens a `Settings` content item.

   If the Page content item has no *Elastic Social* entry go to the *Local Settings* field and add the required property to the Struct field.

Now, you can change a setting.

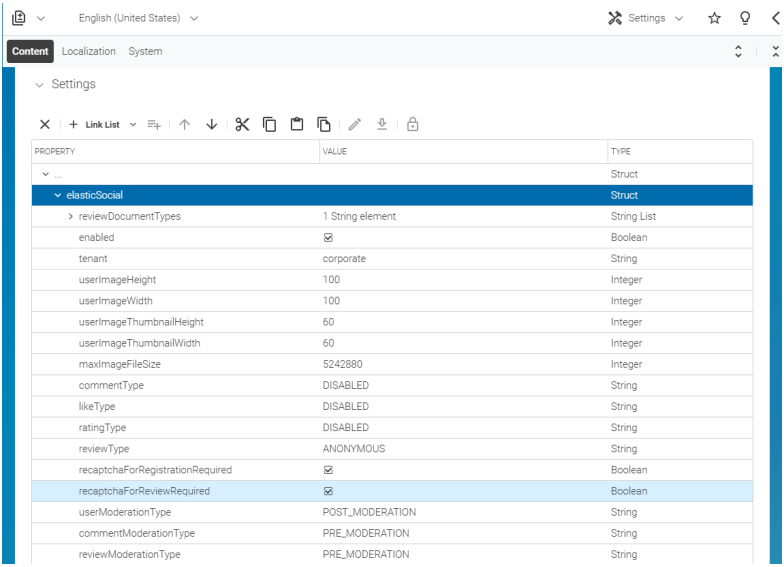


*Figure 3.18. Elastic Social configuration in a Settings content item*

# 3.3.15 Editing Mail Templates

For several moderation activities an email is sent to the user, for example when you reject a comment of a registered user. *CoreMedia Elastic Social* comes with predefined templates for these emails. You should adapt the templates to your needs as follows:

Each email type has a global template that is stored in the system. To change the template, proceed as follows:

1. Open the folder `Settings\Meta\Mail` from the Library.
2. Double click the template you want to edit.

The template is opened in the *Form*.

3. Adapt the template to your needs. Click *Show help for email form* below the *Email Text* field to get a list of variables you can use in the email.
4. Save the template.

Now, all emails of the changed type will contain your changes.

# 3.3.16 Defining Default Folders for Quick Create

When you create a new content item with the **Create** (1) menu, you will see a default folder pre-selected (2), in which the new content item will be created. This default folder is customizable. You will learn how to customize the folder per content type using specific content items. Of course, you can always select a different folder manually in the **Create** window.

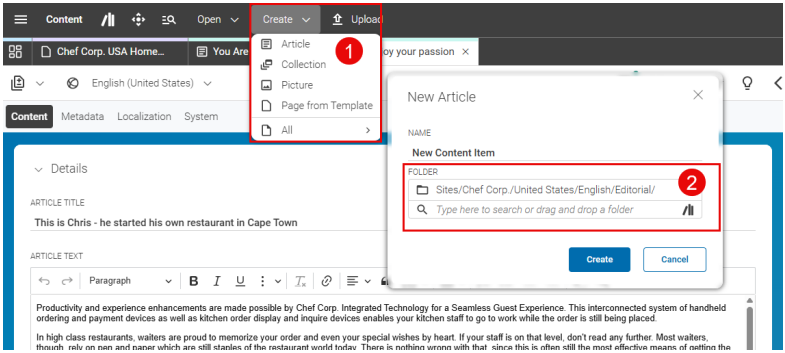


*Figure 3.19. Quick Create an Article*

NOTE

It is possible that your CoreMedia system developers already have defined the default folders programmatically. In this case, you are not able to overwrite the default folders. Get in touch with your administrators to clarify.

You can define the default folders in three contexts:

- Globally
- For a specific site

- Only for yourself

Before your new settings come into effect, you also have to delete your old default folder history. This is because, the last used folders are stored in a history and are used before the default folders you define here. In general, the default folder is determined in the following order:

1. Programmatically defined default folders
2. Last used folders from your history
3. Globally defined default folders
4. Site-specific defined default folders
5. Personal default folders

## Deleting old Folder History

1. Open the `EditorPreferences` content item in your Home folder.
2. Delete all entries below the *`lastUsedContentCreationFolders`* `Struct` property.

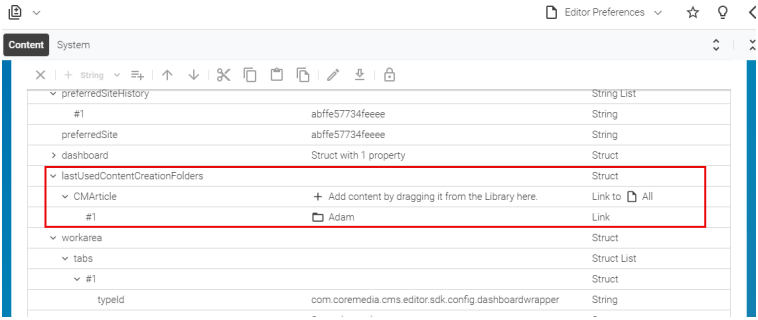


*Figure 3.20. Editor Preferences*

## Configuring Global Default Folders

Global default folders take precedence over personal default folders. They are used for all users and sites, except when you define site-specific default folders. In this case, the site-specific folders have precedence.

1. In the Library, go into the folder `All Content/Settings/Options/Settings`.

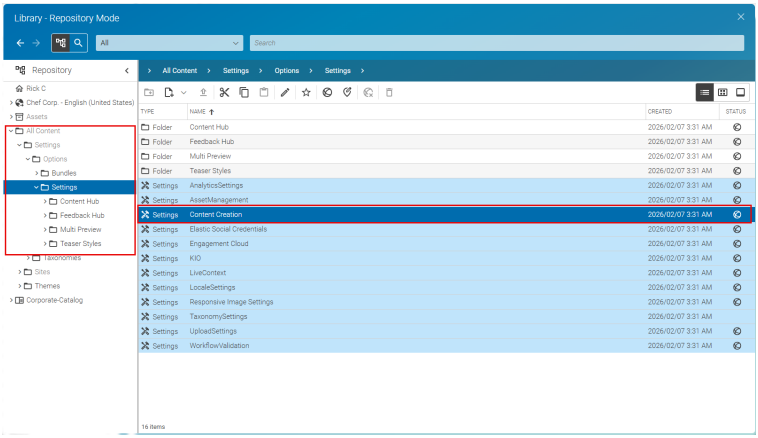


*Figure 3.21. Global Settings Folder*

2. Open the `Content Creation` Settings content item, or, if it not exists, create this item and open it.
3. If the content item does not already contain a `paths` `Struct` property, create it.
4. Now, you can add a `Link` property, for each content type, for which you want to define a default folder. The property name (first column) must match the technical name of the content type. For example, an Article has the technical name `CMArticle`. When in doubt, ask your technical staff. For the value of the property, drag the folder you want to use as default onto the value field.

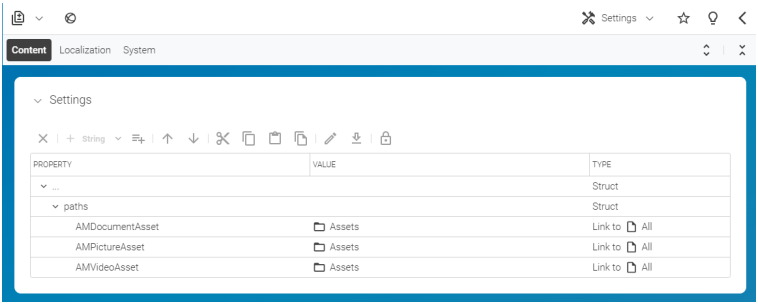


*Figure 3.22. Folder paths in Content Creation content*

## Configuring Site-Specific Default Folders

Site-specific default folders overwrite the global folders defined above. When you create content via the **Create** menu, the `Content Creation` content item from the preferred site will be taken.

1. In the Library, go into the folder `<MySiteName>/Options/Settings`.
2. Open the `Content Creation` Settings content item, or, if it not exists, create this item and open it.
3. If the content item does not already contain a `paths Struct` property, create it.
4. Now, you can add a `Link` property, for each content type, for which you want to define a default folder. The property name (first column) must match the technical name of the content type. For example, an Article has the technical name `CMArticle`. When in doubt, ask your technical staff. For the value of the property, drag the folder you want to use as default onto the value field.

## Configuring Personal Default Folders

If no company-wide default folders are defined for the content type (which would take precedence over your personal settings), you can define your own personal defaults.

1. In your home folder (the one with your user name) open the `EditorPreferences` content item.
2. If it not already exists, create a `contentCreationPaths Struct` property below the main `Struct` property.
3. Now, you can add a `Link` property, for each content type, for which you want to define a default folder. The property name (first column) must match the technical name of the content type. For example, an Article has the technical name `CMArticle`. When in doubt, ask your technical staff. For the value of the property, drag the folder you want to use as default onto the value field.

# 3.4 Getting Technical Information

Sometimes, mostly for troubleshooting, you need technical information about your *Studio* installation. Therefore, *Studio* contains a window that collects all this information ready for copy and paste. This includes information about the logged in user, the license, the operating system and internal data about *CoreMedia Studio*. In order to open the window proceed as follows:

1. Open the *Main Menu* and select **About** from the bottom.
2. The *About* window opens up.

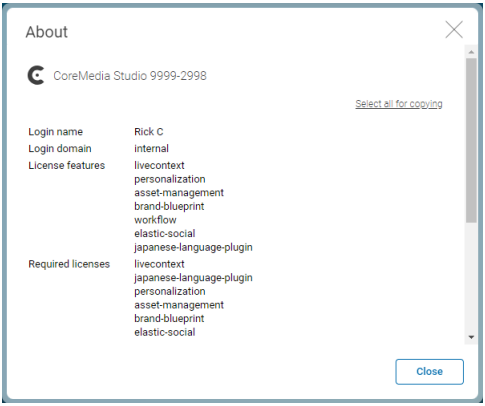


*Figure 3.23. The About window*

3. Click **[Select all for copying]** and press **<Ctrl>+ <C>** to copy the content of the window into the clipboard.

# 3.5 Managing Users and Groups

> NOTE
> The User Manager is only available for members of the administrator group.

The User Manager is a Studio app that you can use to manage users, groups and rights.

## 3.5.1 Opening the User Manager

Open the **Main** menu and select **User Manager**.

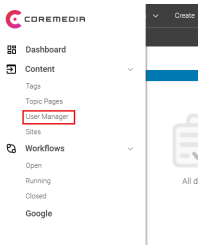


*Figure 3.24. Open User Manager*

## 3.5.2 Searching for Users and Groups

1. Open the **Main** menu and select **User Manager**.

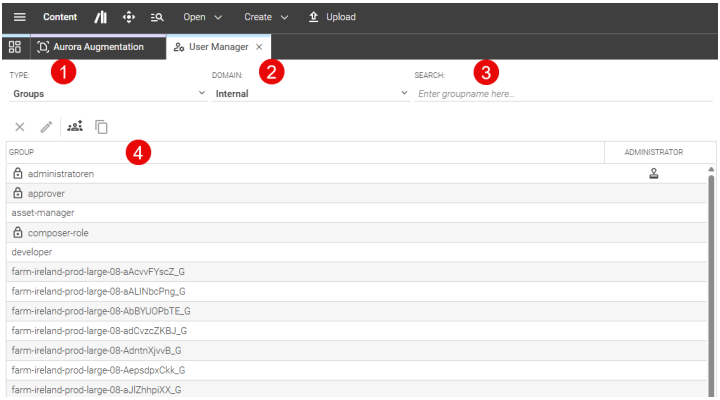


*Figure 3.25. Search fields*

2. In field *Type* (1) select if you want to search for users or groups.
3. In field *Domain* (2) select the domain.
4. In field *Search* (3) enter your search. The results matching your search are displayed in the list below (4).

> **NOTE**
>
> By default, you have to enter at least three characters, to get results. This number can be changed by a system administrator in the property `studio.usermanager.minSearchCharacters`.

5. In order to open the detail view, you can either double-click a user or group or select it and click the *Edit* icon.

## 3.5.3 Creating a New User

> **Prerequisite**
>
> You have to be a member of the administration group in order to create or edit groups.

In order to create a new user, proceed as follows:

1. Open the User Manager.

2. Click the **[Create a new User]** button (1).

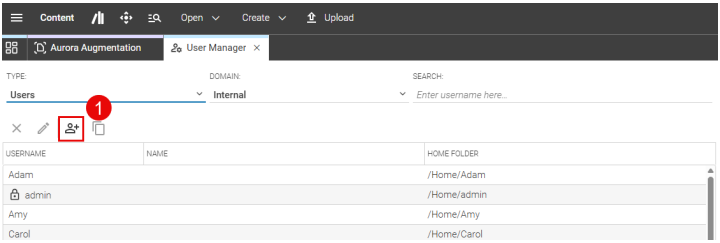


*Figure 3.26. Create new user with icon*

A window pops up.

3. Enter the Username, the password for login and the email address in the corresponding fields and the display name in the *Name* field.

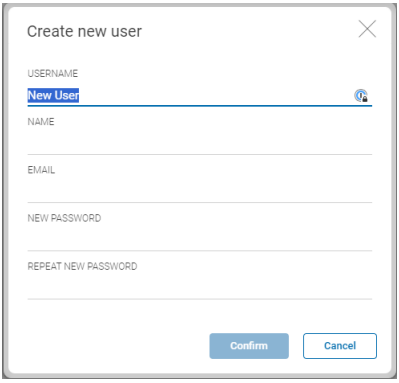


*Figure 3.27. Create new user popup windows*

4. Click **[Confirm]** to start the creation. The detail view of the user opens up.

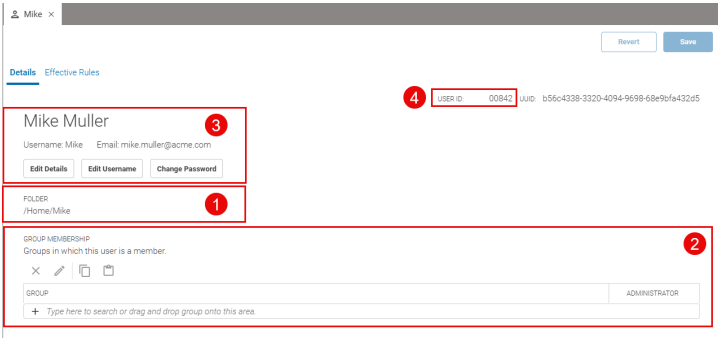


*Figure 3.28. Set home folder and group membership*

The *Folder* field (1) is showing the default home folder of the user. You can edit the name and email by clicking *Edit Details*, the username by clicking *Edit Username* and change the password by clicking *Change Password*. When you change the username, you also have to enter a new password. The name of the Home Folder of the user will not be changed.

A home folder stores personal content items, as well as queries or settings.

NOTE

By default, a user has no rights on its home folder. You have to add the user to a group which has appropriate rights on this folder. See, for example, the predefined staff group.

5. In order to be able to do anything, the user needs membership in one or more groups. Click in the link list of the *Group Membership* field (2) and select groups from the dropdown list.
6. If you want, you can check the effective rules of the user by opening the *Effective Rules* tab (see Section 2.5, “Permissions and Rights” [51] for details on rules). You will see all the rights of the user on folders and content types due to the membership of the user in groups.

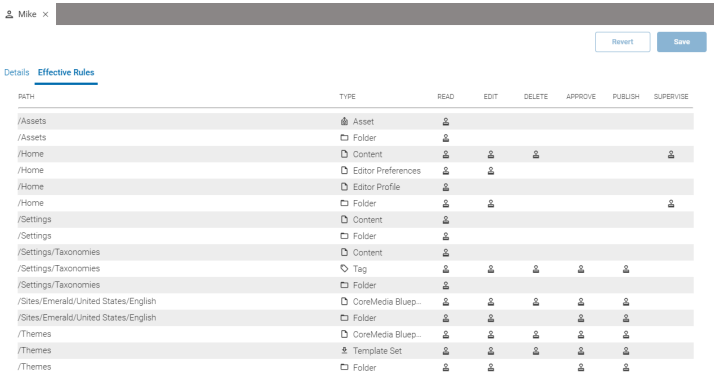


*Figure 3.29. Check effective rules*

7. Click **[Save]** in order to save the newly created user.

   If you want to discard changes, click **[Revert]**.

# 3.5.4 Creating a New Group

> **Prerequisite**
>
> You have to be a member of the administration group in order to create or edit groups.

A group contains rules on CoreMedia resources. In order to create a new group, proceed as follows:

1. Open the User Manager.
2. Click the **[Create a new Group]** button (1).

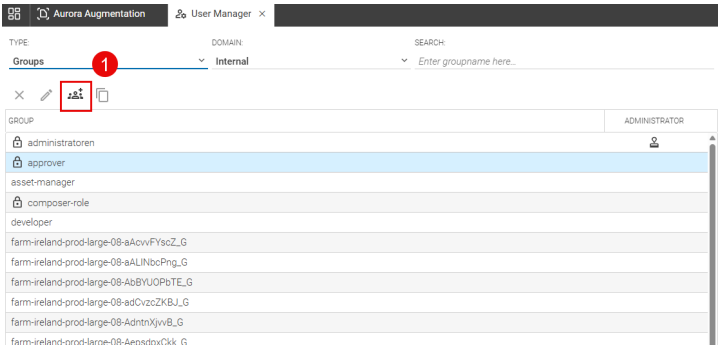


*Figure 3.30. Create new group*

A window pops up.

3. Enter the group name in the corresponding field. If the group should have administrator rights, check the corresponding checkbox (see Section 3.15.3, "Administrator Groups" in *Content Server Manual* for details on the administrator group).

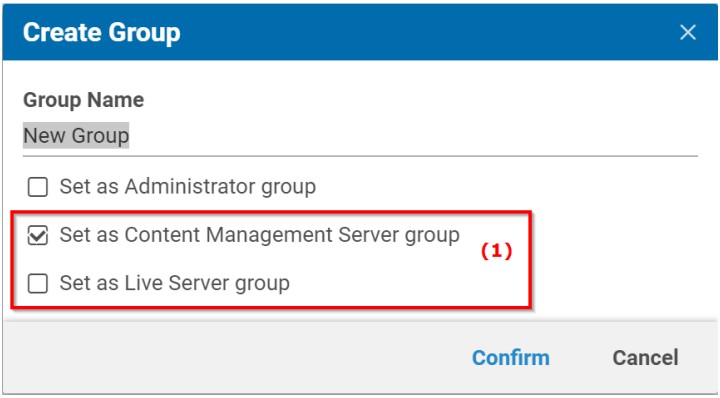


*Figure 3.31. Create a new group popup windows*

4. Your administrators might have configured the use of Live Server groups (a deprecated feature). In this case, you will see the two options in field (1). Live Server groups can be used to manage access rights to content on the live side of *CoreMedia Content Cloud* (see Section 3.15.5, "Live Server Groups and Users" in *Content Server Manual* for more details on live server groups). *Content Management Server group* is the default setting, which is also used when

no Live Server groups are activated. Select the checkbox of the group type you want to use.

Click **[Confirm]** to start the creation. The detail view of the group opens up.

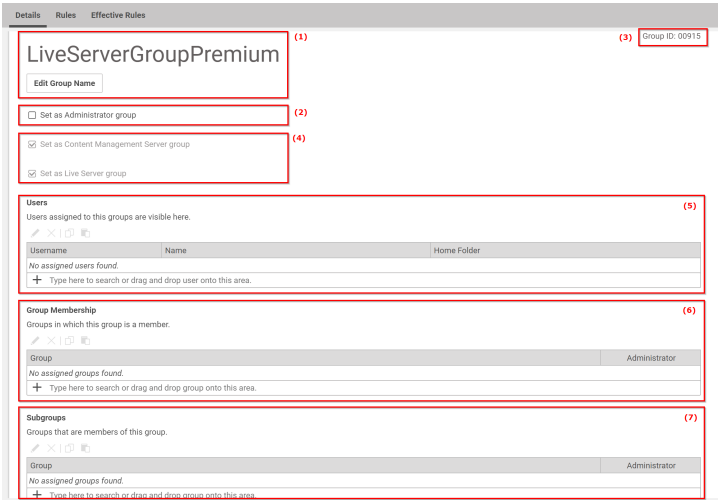


*Figure 3.32. Set group members and membership*

If you made errors during the creation of the group, then you can edit the name (1) and add or remove the administration rights (2). You can also see the ID of the group (3). The group type in field (4) is only shown when Live Server groups are activated. They can not be changed in this window.

5. A group can be a member of another group, where a subgroup inherits the rules of its parent group (see Section 2.5, "Permissions and Rights" [51] for details). In addition, a group can have assigned users.

   In order to add groups and users, proceed as follows:

   a. Click in the link list *Group Membership* (6) and select groups from the dropdown list from which the new group should be a subgroup.

   b. Click in the link list *Subgroups* (7) and select groups from the dropdown list which should be subgroups of the new group.

   c. Click in the link list *Users* (5) and select users from the dropdown list which should be members of the new group.

6. Open the *Rules* tab and add new rules. See Section 3.5.5, "Adding, Deleting and Editing Rules" [110] for adding rules.

7. If you want, you can check the effective rules of the group by opening the *Effective Rules* tab (see Section 2.5, “Permissions and Rights” [51] for details on rules). You will see all the rights of the group on folders and content types due to the defined rules and the membership in other groups.

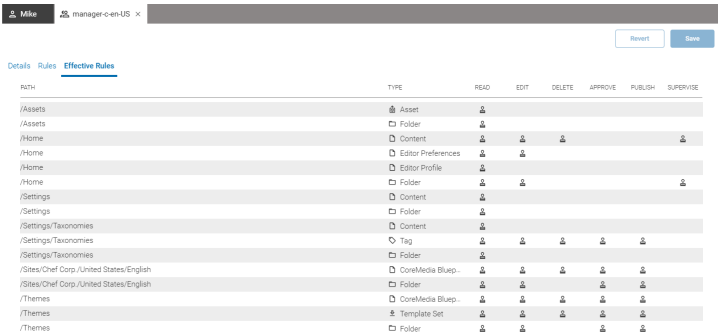


*Figure 3.33. Check effective rules*

8. Click **[Save]** in order to save the changes to the newly created group.

   If you want to discard changes, click **[Revert]** .

# 3.5.5 Adding, Deleting and Editing Rules

Rules define the rights on CoreMedia resources, that is content and folders. Read Section 2.5, “Permissions and Rights” [51] for details on rules and rights.

## Adding Rules

1. Open the *Rules* tab of a group in the User Manager.

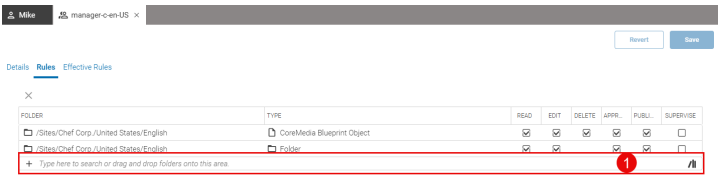


*Figure 3.34. Adding rules*

2. Rights are always defined below a specific folder. In order to select a folder for which you want to define a rule start typing in field (1) or click the library icon and drag a folder onto the field. The new rule is added to the list.

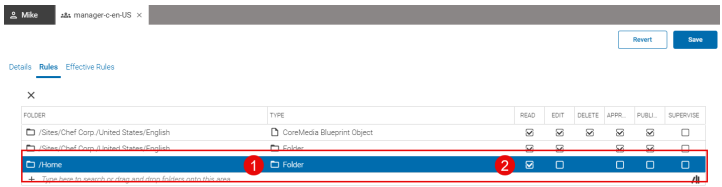


*Figure 3.35. New rule in list*

3. You can now edit the new rule. Click on the *TYPE* field to select the resource type (1) to which you want to apply the rule.

   Now, you can attach rights. Check the checkbox (2) for the rights you want to grant. See Section 2.5, “Permissions and Rights” [51] for details.
4. Click **[Save]** to save your changes.
5. If you want to check the effective rules for this group, open the *Effective Rules* tab.

## Deleting Rules

1. Open the *Rules* tab of a group in the User Manager.
2. Select the rule you want to delete.
3. Click the "X" icon above the link list. The rule is deleted without any check.
4. If you want to restore the deleted rule, click **[Revert]**, otherwise click **[Save]** in order to save your changes.

Now, you have deleted the rule.

# 3.5.6 Defining Rights on Folders

As a user with supervise or administrator rights you can directly add rules to a folder (see Section 2.5, “Permissions and Rights” [51] for details) in order to give other users editing rights.

1. From the context menu of a folder, select **Properties**. The **Properties** window opens up.

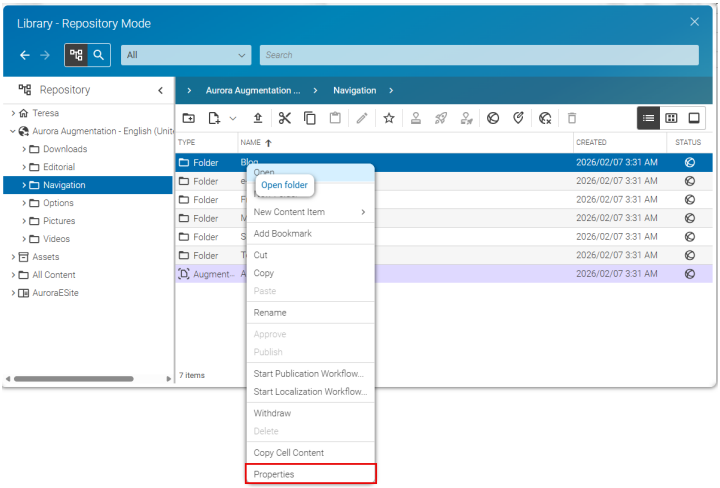


*Figure 3.36. Open the Properties window*

2. Select the *Permissions* tab. If there are already rules attached to the folder, you will see them and can edit them. When you want to revoke your own "Supervise" right, you will get a warning message which you have to confirm.
3. In the *Permissions* tab, click the + icon, in order to create a rule. You have to select a group to which the rule is added and select rights for these group on the selected folder. See Section 2.5, “Permissions and Rights” [51] for a description of the CoreMedia rights and permission system.

   In order to enable the editors to work on content, you need to add another rule for content inside the folder.

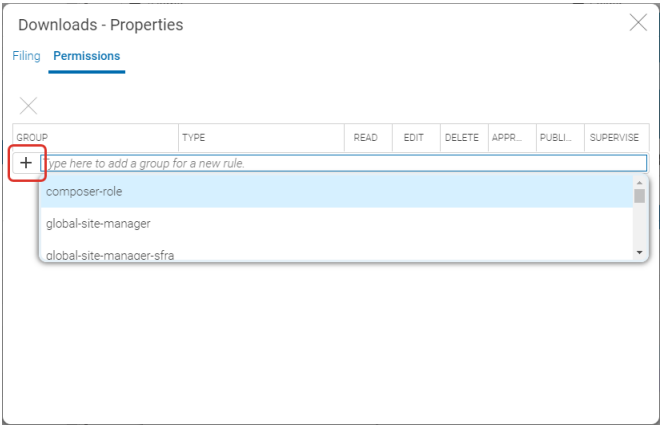


*Figure 3.37. Add rules to folder*

4. If you want to save the changes, click **[Save]** . If you want to revert your changes, click **[Reset]** .

NOTE

It is possible, that other users edit the permissions while you are working on it. When you try to save your changes and the other users have already saved their changes you will get a warning dialog and have to discard your changes.

# 3.5.7 Rights recommendations

*CoreMedia Studio* contains content items which store preferences or other data necessary for some features. Even if *CoreMedia Studio* is robust for deletion/modification of those content items deletion/modification can cause temporary issues. Therefore it is recommended to protect those content items by omitting the Delete Right or even the Modify Right.

| Content item type | Folder | Recommended rights | Reason |
|---|---|---|---|
| `EditorPreferences` | `/Home` | RM | Stores user preferences, deletion causes lose of data as well as temporary error messages. |

| Content item type | Folder | Recommended rights | Reason |
|---|---|---|---|
| `EditorProfile` | `/Home` | R | Stores personalized generated data, should not be adapted by users. |

*Table 3.1. Recommended rights*

# 3.6 Hiding Studio Form Components

This chapter describes how you can hide fields in the form of a specific content type. That is, when you open a content item of this type afterwards, you have only fields which are relevant for your daily work.

1. Open a content item of the content type you want to customize. For example, an Article
2. Click on the content type icon button of the content item in the title bar to open the menu and select the *Configure Form* menu item to open the configuration dialog.

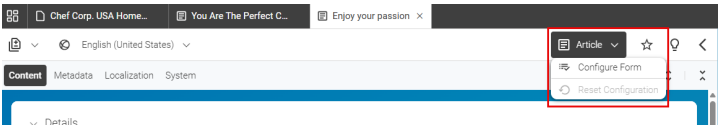


*Figure 3.38. Configure Content Form Button*

3. The configuration dialog opens up. All checkboxes are checked for a non-customized content type. That means, all tabs and fields will be shown. Uncheck the checkboxes of tabs, field groups or groups you want to hide.

   Once you have hidden one or more components on a tab, a blue dot will be attached to the tab bar (1).

   In addition the **[Select all]** button (4) will be activated. Clicking the button will revert all configurations you've done on the tab so that all the components hidden before will be visible again. The blue dot disappears.

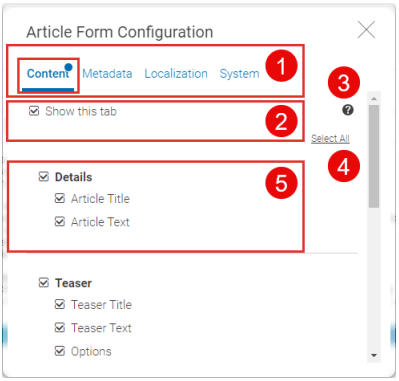


*Figure 3.39. Content Form Configuration Dialog*

- The configuration dialog has the same tabs as the content form itself (1).

  You can hide (uncheck) a complete tab by unchecking the *Show this tab* checkbox (2). Checking the checkbox will make the tab visible again.
- You can configure the content form on a deeper level. Unchecking the checkbox *Article Title*, for example, will hide the RichText field "Article Title" on the content form but not the property field group "Details". You can also hide the whole property field group *Details* by unchecking the corresponding checkbox. As before checking the checkbox will make the component visible again.
- The help icon (3) gives you information about this dialog.

4. When you've completed the configuration on all tabs, close the dialog by clicking on the "X" at the top of the dialog.

The configuration is now applied for you to all contents of the same content type, here for all articles.

If a content type is configured, then the content type icon button has a blue dot so that you can easily recognize customized content types.

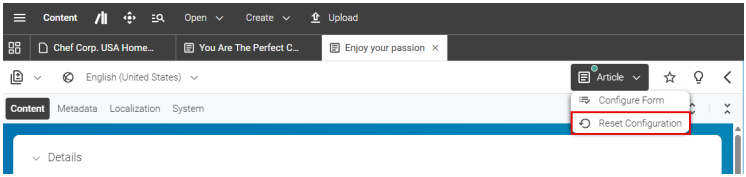


*Figure 3.40. Content Form Configuration Button after Configuration*

## Reset the Configuration

In order to completely reset the configuration and show all components again, click on the content type icon button of the content item in the title bar to open the menu and select the *Reset Configuration* menu item to reset the configuration (see Figure 3.40, “Content Form Configuration Button after Configuration” [116]).

If you only want to reset a specific tab, property field group or field open the configuration dialog and check the corresponding checkboxes.

# 3.7 Editing Rich Text Source Code

The CoreMedia rich text field allows you to edit the XML representation of rich text content. By default, this feature is activated for administrative users. If the feature is active, you find a new button in the rich text toolbar. The XML follows the schema defined in `coremedia-richtext-1.0.dtd`.

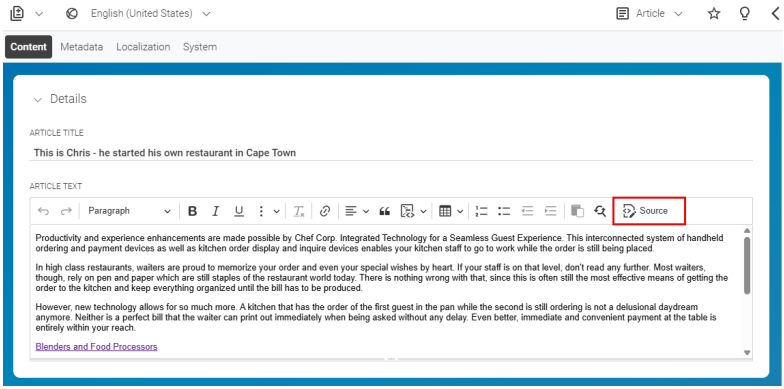


*Figure 3.41. Enabling source code editing*

CAUTION

When editing raw rich text XML you need to take care providing valid CoreMedia Rich Text 1.0, as otherwise you may lose data. If in doubt, ensure to check in contents before editing them.

There are some subtle differences between CoreMedia Rich Text 1.0 depicted in Studio and on the server. Especially linked contents.

```
<?xml version="1.0" encoding="utf-8"?>
<div xmlns="http://www.coremedia.com/2003/richtext-1.0"
     xmlns:xlink="http://www.w3.org/1999/xlink">
  <p class="p--heading-2">
    CKEditor 5 Source Editing
  </p>
  <p>
    CKEditor 5 Source Editing feature provides [...]
    to edit
    <a xlink:href="content/22990">
      CoreMedia Rich Text
    </a>
    [...]
  </p>
```

```
  <p>
    <img alt=""
         xlink:href="content/6622#properties.data"
    />
  </p>
</div>
```

*Example 3.1. CoreMedia Richtext 1.0 in Studio*

```
<?xml version="1.0" encoding="utf-8"?>
<div xmlns="http://www.coremedia.com/2003/richtext-1.0"
     xmlns:xlink="http://www.w3.org/1999/xlink">
  <p class="p--heading-2">
    CKEditor 5 Source Editing
  </p>
  <p>
    CKEditor 5 Source Editing feature provides [...]
    to edit
    <a xlink:href="coremedia:///cap/content/22990">
      CoreMedia Rich Text
    </a>
    [...]
  </p>
  <p>
    <img alt=""
         xlink:href="coremedia:///cap/blob/content/6622#data"
    />
  </p>
</div>
```

*Example 3.2. CoreMedia Richtext 1.0 on Server*

Example 3.1, “CoreMedia Richtext 1.0 in Studio” [118] shows a representation that will open as soon as you activate source editing. As you may notice, URIs to content and BLOBs look different from what you may know from Unified API. You may expect rather a representation as shown in Example 3.2, “CoreMedia Richtext 1.0 on Server” [119].

While you will always see links as so-called CoreMedia Studio URI paths, you are free to enter links in their Unified API representation. Just note, that next time you open source editing, you will see the URI path instead.

There are also some differences between standard rich text editing and editing the raw XML code.

- **Autosave:** Auto save isn't active while editing source code. The changes will be stored as soon as you switch back to the standard editing view.
- **Undo:** There is no undo during raw XML editing. However, when you switch back to standard rich text editing, the changes you have done are stored as an extra undo step. So, you can always undo what you have changed before in source editing.

# 3.8 Usage Tracking

NOTE

The Tracking Plugin is a Blueprint plugin and might not have been installed by your company. In this case, you will not find the described entries in the *Preferences* menu. The plugin is also the technical foundation for in-app guides.

In order to learn more about the needs of CoreMedia Studio users and to improve the Studio user experience, CoreMedia has integrated a Pendo plugin in CoreMedia Content Cloud. This plugin also allows CoreMedia to provide you with in-app user guides (see Section 2.15, "In-App Guide Portal" [70]).

## Data Tracking and Privacy

CoreMedia wants to collect usage data to gain a better understanding of what we can improve in our services, and to improve the usage experience of our customers. In addition, data tracking is technically required for our in-app guides.

These data includes, for example, statistics about click-behavior, or the used CoreMedia workflows and their size. We utilize cookies and scripts through a trusted service provider. Collected data is anonymized.

**This does not include any personal data or sensitive information.**

Technically, we use scripts and cookies from a trusted service provider to collect the data.

You can revoke your consent at any time by changing the settings under „Permissions" in your „Preferences". In this case, we will limit ourselves to the cookies and scripts technically necessary for the usage of Studio .

See our Privacy Policy for more detail and general information of CoreMedias privacy policy.

## Activating Data Tracking

When you want to support the improvement of Studio or when you want to use in-app guides, you have to activate data tracking (for in-app guides, you also have to activate in-app guides, see Section 2.15, "In-App Guide Portal" [70]). You can either activate data tracking, when you log in for the first time or any time later.

1. When you log in for the first time, data tracking is not activated, and you will get a dialog, where you can enable data tracking. Simply click *Enable Data Tracking* and then click **[Save]**. We recommend that you also activate in-app guides in this step.

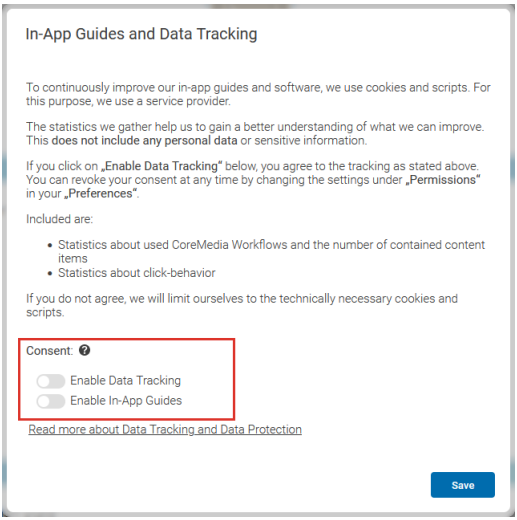


*Figure 3.42. Initial activation window*

2. When you have skipped the data tracking activation at your first login, and want to activate it later, open the *Preferences* menu.

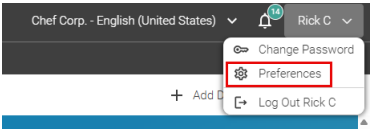


*Figure 3.43. Open Preferences Menu*

3. In the *Preferences* menu, select the *Permissions* tab.

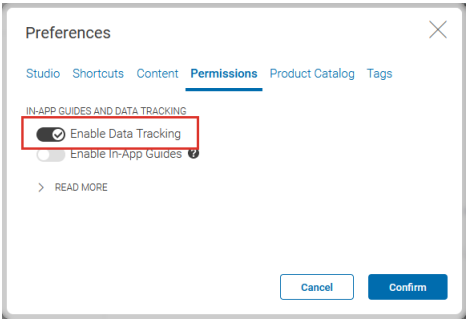


*Figure 3.44. Preferences Menu*

4. Click *Enable Data Tracking*. This enables data tracking. Click **[Confirm]** to save your changes and to leave the *Preferences* dialog afterwards.

## Deactivating Usage Tracking

You can deactivate data tracking (and consequently also in-app guides) any time you want.

1. Open the *Preferences* menu.

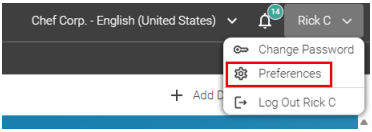


*Figure 3.45. Open Preferences Menu*

2. In the *Preferences* menu, select the *Permissions* tab.

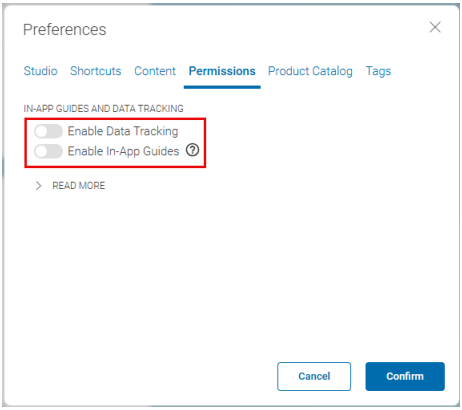


*Figure 3.46. Preferences Menu*

3. Deactivate the *Enable Data Tracking* switch. This will deactivate data tracking and, consequently, also in-app guides. Close the *Preferences* dialog afterwards.

# 4. Working With Content

In this section, you will learn how to use *CoreMedia Studio* to complete your daily work. This will cover tasks such as the following:

- Creating new text items
- Editing text items
- Adding images, sound files or other multimedia data
- Adding metadata to content items
- Publishing content items to the website
- Removing content items from the website
- Managing content items

These tasks are discussed in the subsections:

- Section 4.1, "CoreMedia Studio: log in and log out" [125] shows you how to start the *CoreMedia Studio* application.
- Section 4.6.2, "Comparing Versions" [173] shows you how to compare two versions of a content item.
- Section 4.2, "Using the Dashboard" [126] shows you how to work with the Dashboard.
- Section 4.3, "Locating Content" [129] shows you how to locate content items and navigate within the *Studio*.
- Section 4.4, "Editing the Content Structure" [144] shows you how to edit the structure of your website – that is, how you can create, relocate, publish or delete content items and folders.
- Section 4.5, "Editing the Navigation Structure" [161] shows you how to edit the navigation and layout of your site.
- Section 4.6, "Editing Content" [170] shows you how to edit the various fields within a content item – how you can create text items, link content items or insert images, for example.
- Section 4.7, "Managing Content" [245] shows you how to manage content, that is how to organize it in projects or how to bookmark important parts.

# 4.1 CoreMedia Studio: log in and log out

To log in to *CoreMedia Studio*, simply use a supported web browser to access the URL that you have been given by your system administrator. For example:

```
http://localhost:8001/studio
```

*Login Window*

The login window is then displayed. Here, you will need to enter your user name and password and select your domain. Following this, the *CoreMedia Studio* start tab opens.

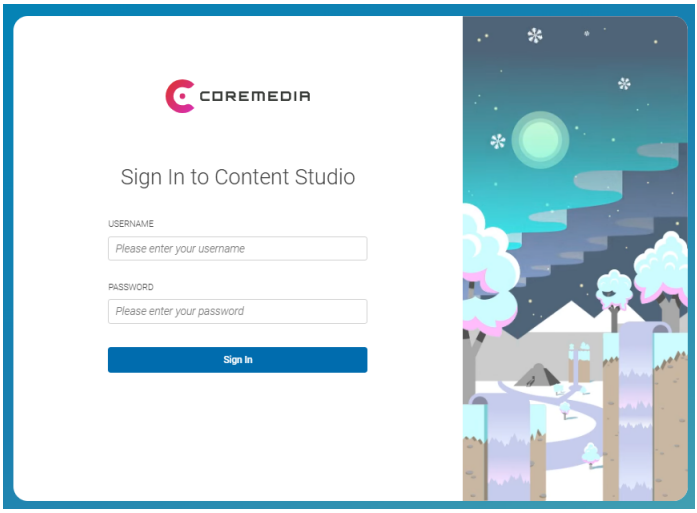


*Figure 4.1. The login window*

If you have entered an incorrect name, password or domain, then an error message is shown and you can repeat your login attempt.

*Logging out*

To log out from *CoreMedia Studio*, simply click on the small arrow beside your name and select *Log out*. Any changes to any incomplete content items will be saved automatically and will be available to you the next time that you log in.

*Logout through timeout*

If you do not use *CoreMedia Studio* for a length of time, but stay logged in, then a timeout event may occur. In this case, you will be redirected to the login screen where you can enter your password again. Any content items you had open will be saved, along with any changes.

# 4.2 Using the Dashboard

The Dashboard gives you a quick overview of your current work (see Section 2.4.1.10, “Dashboard” [44] for details).

You can add widgets to the Dashboard and arrange them in a grid with three rows using drag and drop.

| Symbol | Name |
| --- | --- |
| + | Add Widget |
| | Open Widget Configuration |
| | Close Widget Configuration |
| | Reload Widget |

*Table 4.1. Dashboard Icons*

## 4.2.1 Adding Widgets

You can add a widget at a specific position or automatically to the emptiest row. Afterwards, you can rearrange it using drag and drop.

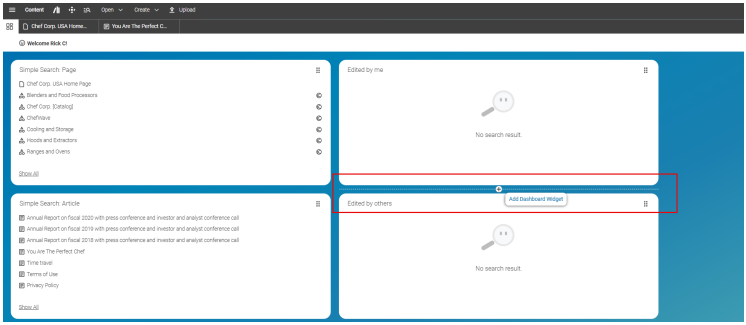


*Figure 4.2. Adding a widget*

In order to add a widget to the end of the emptiest row, click the **[Add Widget]** icon. In order to add the widget at a specific position, move the cursor over the space between two positions (see Figure 4.2, “Adding a widget” [126]) and click with the mouse. A new widget opens in configuration mode.

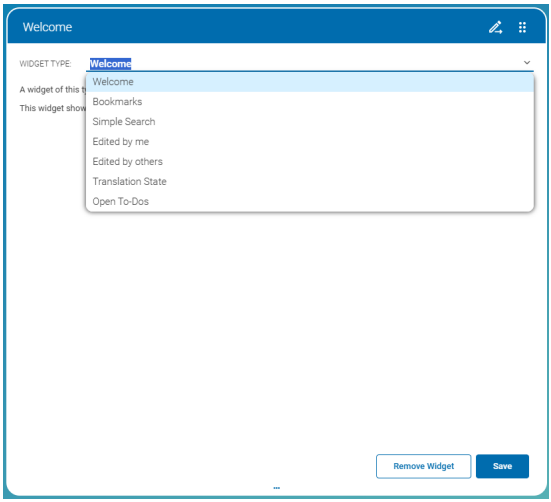


*Figure 4.3. Widget in configuration mode*

Select the widget in the field *Widget type*. Depending on the type, you can configure the widget with other fields. For a "Simple Search", for example, you can define the content type you want to search in and the search text. Afterwards, click the **[Save]** icon. Now, you have created a new widget.

## 4.2.2 Reloading Widgets

By default, widgets are automatically refreshed every 30 seconds when the dashboard is visible. In order to explicitly reload the content of a widget, click the icon.

## 4.2.3 Removing Widgets

In order to remove a widget, click the **[Open Widget Configuration]** icon. The configuration view of the widget opens. Click **[Remove widget]** in order to remove the widget.

# 4.2.4 Scaling Widgets

You can scale widgets in vertical direction. Enter the configuration mode, grab the handle at the lower side of the widget and drag down.

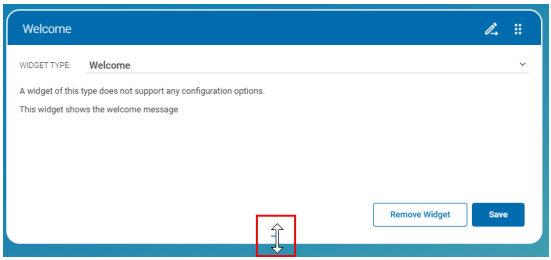


*Figure 4.4. Scale widget*

# 4.3 Locating Content

In this section, you will learn the quickest and easiest ways to find your content items. A number of options are available:

- Using Quick Search
- Using search folders or search widgets
- Using a full-text search to find content items in the Library
- Using a semantic search to find content by its meaning
- Finding content items that link to the current content
- Opening linked content items
- Opening content items in the Library from the Form View
- Opening content items from the preview

## 4.3.1 Using Quick Search

CoreMedia Studio contains a Quick Search feature which allows you to search for terms in the following items:

- Content Items
- Commerce Products
- Content Hub items
- Apps
- Workflows
- Custom Actions

### Using the Quick Search Dialog

1. In order to open the Quick Search dialog use the shortcut **Ctrl+Alt+Space** or click in the Header menu.

   The Quick Search dialog opens up.

*Figure 4.5. Quick Search Dialog*

2. Enter your search term in the *Search* field. You will get search results while typing.

   The search results are ordered by category. For some results, you will get a preview on the right side when you select the result item.

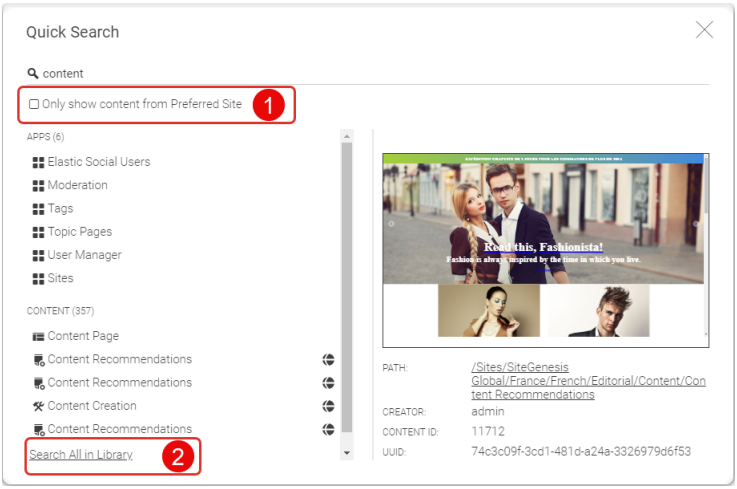


*Figure 4.6. Quick Search Results*

3. By default, Quick Search searches in the complete repository. Mark the *Only show content from Preferred Site* (1) checkbox if you only want to see search results from your preferred site. Quick Search will store this setting for further searches.
4. Quick Search does not show all results in the result window (the number in brackets behind the category title shows the total amount of search results). Click *Search All in Library* in order to open the Library in search mode with a search for your search term through all content.
5. You can open search results with a click or double-click.

# 4.3.2 Searching in the Library

The Library gives you several options to find the content items you are looking for:

- Full-text search of all content items in the CMS and the eCommerce catalogs.
- Full-text search of specific content types
- Full-text search below a specific folder

- Semantic search which does not search for exact keywords but for content which matches the meaning of your search terms. So, when you search for "kitchen scenes", you will get content items which are related to kitchen scenes, even when the word "kitchen" or "scene" is not explicitly mentioned in the content item. This does not only search in text content but also in pictures!
- Filtering results by status and the content item's last editor, for example.

## Search in the Library

In the Library, you can either perform a full-text (keyword) search or a semantic (based on the meaning) search. With full-text search, you can search for a specific keyword or phrase in the name and all fields of all selected content items. When you know the keyword, this is the fastest way to find content items. With semantic search, you can search for content items that are related to a specific topic, for example. This is useful when you do not know the exact keyword, but you know the context of the content item you are looking for.

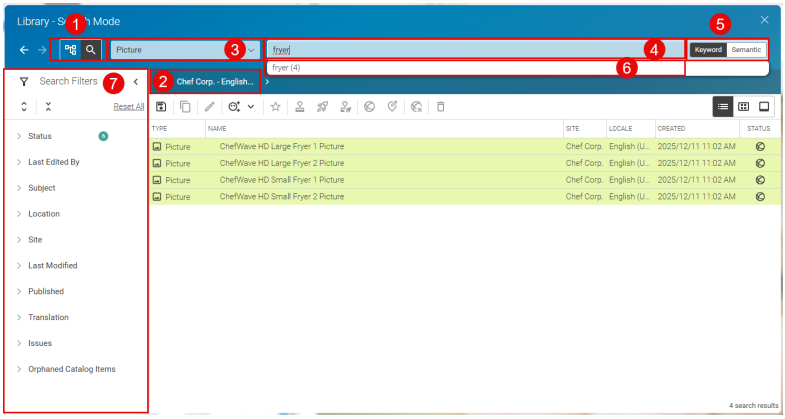


*Figure 4.7. Full-text search options*

Conceptually, a search consists of two parts:

- Defining the search scope by selecting the folder (2) in which you want to search, the content type (3) you want to search for and more search filters from (7) if required. This limits you search to specific parts of the content in the repository.
- The actual search where you enter your search term(s) in the search box (4) and choose the search mode (5).

You do not have to start with defining the search scope. You can also directly enter your search term in the search box (4) and start your search by pressing

the <Return> key. Then you can limit your scope afterward by selecting the folder (2), content type (3) and filters (7) (see section "Filtering the results" [134] for details about the filters).

Here is a description of the UI elements you can use for your search:

| Search Element | Function |
|---|---|
| (1) Library Mode Switcher | Use this switcher to change between the *Browse* mode and the *Search* mode of the Library. The Library automatically switches to Search mode, when you select a content type (3) or when you carry out a search by entering a term in the search box (4) and pressing <Return> on your keyboard. |
| (2) Breadcrumb Navigation | Use this breadcrumb navigation to select the folder below which you want to search. You can also use it to navigate to specific folders when you are in Browse mode. |
| (3) Content Type Chooser | Use this dropdown box to select the content type you want to search for. By default, all content types are selected. The Library automatically switches to Search mode, when you select a content type.<br><br>Semantic search does not support all content types. Catalog items, for example, are not supported. |
| (4) Search Field | Enter your search term(s) into this field. The syntax differs between full-text and semantic search. See the *Search Mode Switcher* description below, for more details. |
| (5) Search Mode Switcher | Use this switcher to choose between full-text search ( **[Keyword]** ) and semantic search ( **[Semantic]** ). The chooser appears only, when you are in Search mode.<br><br>### Full-text Search<br><br>For a full-text search enter the keyword or phrase you are looking for in the search field. The search will return all content items containing this keyword or phrase in any of its fields. You can use some operators to improve your search:<br><br>• Use quotation marks to search for an exact phrase, for example, **`"kitchen scene"`**.<br>• By default, if you enter multiple terms, the search uses AND to combine them. So, entering **`kitchen cooking`** will return all content items containing both terms. |

| Search Element | Function |
| --- | --- |
| | • A minus sign (-) before a term excludes content items containing this term. For example, **`kitchen -cooking`** will return all content items containing the term kitchen but not the term cooking<br>• An asterisk (*) at the end of a term acts as a wildcard and matches any suffix. For example, **`cook*`** will return content items containing cook, cooking, cooker, cookbook, etc.<br><br>### Semantic Search<br><br>In semantic search enter the terms for which you want to get related content. For example, in our ChefCorp example content, you might enter **`kitchen scenes`** or **`cooking events`**. You do not need to use complete sentences like "Show me content about cooking events" because this "Show me" part is only noise for the semantic search. But you should add enough context to get meaningful results. So, just entering a few letters like in full-text search will not work properly.<br><br>NOTE<br><br>Semantic search prioritizes what you want to find, not what you want to exclude. Therefore, it does not work with negating terms, for example, "not", "without", or "excluding". So, searching for "Pictures without people", would not work properly.<br><br>Also keep in mind, that semantic search does not know about the content type model. So, "Show me articles of kitchen scenes" would not only return articles, but also images or other content items related to kitchen scenes. You have to use the content type filter (3) to restrict the search to specific content types and can simply search for "kitchen scenes" then. |
| (6) Search Recommendations | When you are in full-text search mode, and you enter a search term in the search field (4), the system automatically shows suitable extensions to your search term beneath the search box. The figure in brackets shows the number of content items found for this search term. Clicking on a recommendation extends your search term accordingly and starts the search.<br><br>Semantic search does not provide search recommendations. |

| Search Element | Function |
| --- | --- |
| (7) Filter | With this filter options you can filter, for example, for the state of a content item or the last modification date. See section "Filtering the results" [134] for a description of all options. |

*Table 4.2. Search Elements*

## Filtering the results

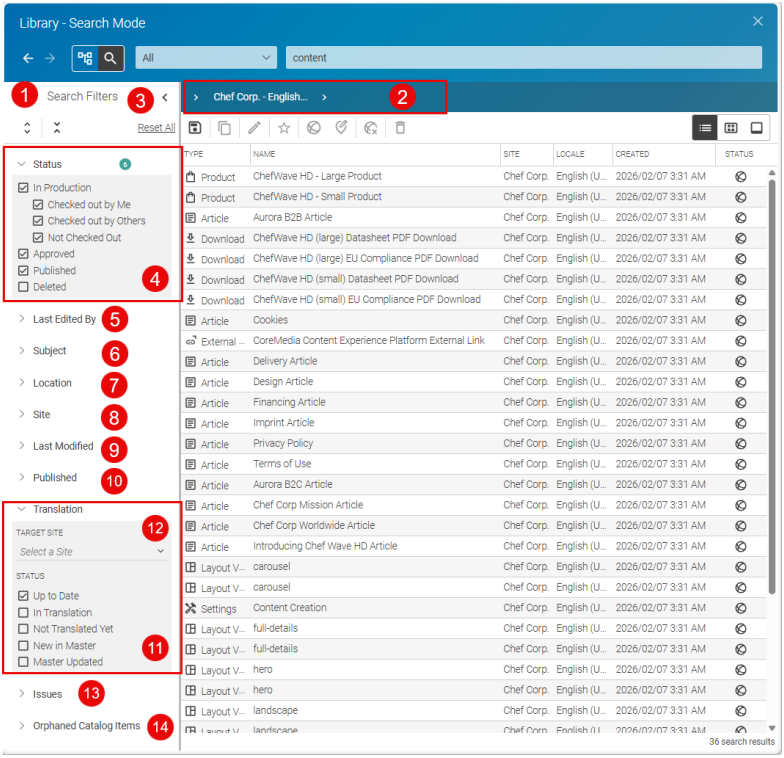


*Figure 4.8. Filter your results*

Open the filter panel with the arrows (3). In the filter panel (1) and the breadcrumb navigation (2), you can filter the displayed results by several criteria. Modules of *CoreMedia Content Cloud* might introduce additional filters, which are not described here. Keep in mind that filtering can only be applied to CMS content.

- The folder (2)
- The editing state (4)
- The last editor (5)
- Subject keywords (6)
- Location keywords (7)
- The preferred site or all content (8)
- The last modification date (9)
- The last publication date (10)
- The translation state (11)
- If the content has issues (13)
- Orphaned entries of the local catalog (14)

1. Select the folder in which you want to search with the breadcrumb navigation.
2. Mark your chosen state in the filter box. With *In production*, you can also choose whether the content item is currently being edited by you, by somebody else or by nobody.

   With *Deleted* you can search content items that have been deleted. Deleted content stores its last folder location, so you can search for deleted content items below the folder where they once were located. In reverse, that means that you will not find content that was located in other folders, when you select a specific search folder in the breadcrumb navigation.
3. Then choose the "Last editor", if required.
4. Then choose the "Last modified" date, if required.
5. Then choose specific location or subject keywords.
6. Then choose the "Published" date to determine, when the content has been published.
7. Then choose the site in which you want to search, if required.
8. Then choose the translation state, if you want to search for content items that have or have not been translated in a given derived site.

   You can select the derived site. Contents from the master site will be displayed in the search result. Keep in mind that the folder selected in the breadcrumb, if any, must also be chosen from the master site to see any results. Mark your chosen translation status in the status boxes, for example restricting the search to new content that has not been translated yet.
9. Then select an issue category and severity from the "Issues" filter, if you want to search for content items with issues. By default, you can choose from two categories: "All Categories" and "Localization". You can also choose an issue type severity like "Errors" or "Warnings". Note however, that search results cannot always be up-to-date for all issue types, and that this filter only appears if indexing has been enabled for errors and warnings. The correct state for a content item is always visible when it is opened in the Form View.

The filtered content items are now displayed. The number in the blue circle (15) indicates the number of selected settings. You can use the curved arrow icon (12) to restore the default setting.

## 4.3.3 Creating Search Folders

You can save and call your full-text or semantic searches in *CoreMedia Studio* as search folders or dashboard widgets. Proceed as follows:

1. Open the Library and execute a search as described in Section 4.3.6, “Navigating in the Library” [138].
2. Click the **[Save search folder]** icon (1).

   A dialog box opens up where you can select an action and enter a name (see Figure 4.9, “Creating a search folder” [137].
3. If you want to create a new search folder leave the default *Create New Search Folder* selection in the first dropdown box and enter the name into the *Search Folder Name* field.

   Or

   If you want to create a new widget on the dashboard, select the entry *Create New Widget* in the first dropdown box and enter the name into the *Search Widget Name* field.
4. Click **[Confirm]** to save the search folder / widget.

You have created a new search folder in the **Open** menu in **My Saved Searches**, respectively a new widget on the dashboard. New entries in the **My Saved Searches** menu always appear at the end, but you can use the context menu to change the order of the search folders.

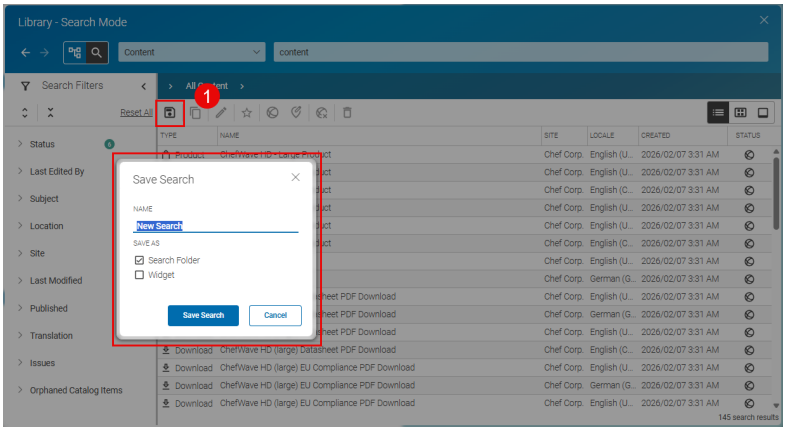


*Figure 4.9. Creating a search folder*

# 4.3.4 Deleting a Search Folder

In order to delete a search folder, right-click the folder in the **My Saved Searches** entry of the **Open** menu and select **Remove Search Folder** from the context menu.

# 4.3.5 Using Search Folders

The **Open** menu with the search folders is shown in the Header bar of the *Studio* screen (see Figure 4.10, “Search Folders” [138]. Here, you will find the results of predefined searches for the most important content types in your *CoreMedia CMS* installation and of course your own saved search folders. Click on one of the search folder entries to open the Library with the results of the corresponding search. The search folders can be selected individually for each *CoreMedia CMS* installation. As a result, the folders shown in the screenshot may differ to those available in your system.

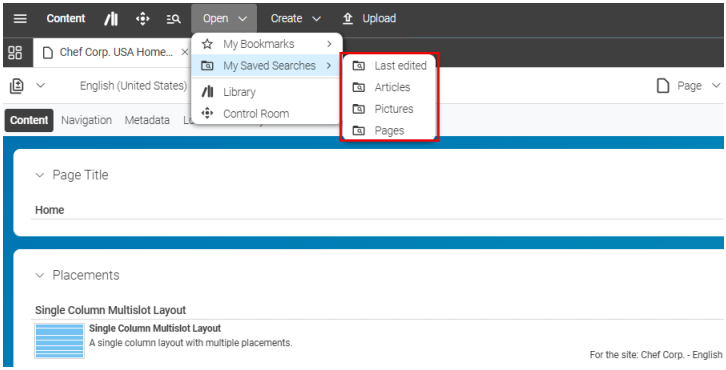


*Figure 4.10. Search Folders*

# 4.3.6 Navigating in the Library

The Library gives you several options to find the content items you are looking for:

- Navigating using the tree view
- Finding content in the recycle bin
- Sorting content in columns
- Hiding columns
- Full-text search of specific content types and semantic search as described in Section 4.3.2, “Searching in the Library” [130].

## Hiding columns

In order to get a better overview, you can hide columns from the content lists in the Library.

To do so, hover over a column head. An arrow appears on the right side of the head. Click the arrow and a menu opens up. Select **Columns** and uncheck the columns you want to hide.

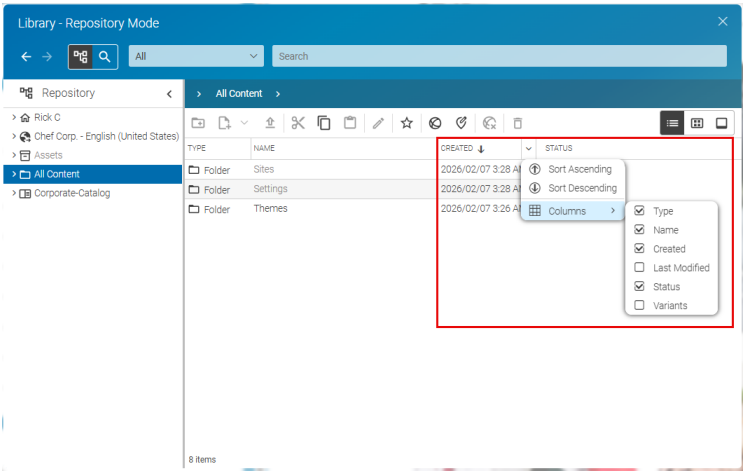


*Figure 4.11. Hiding columns*

## Sorting by column

You can sort your lists in the Library or change the order by clicking a table header. *Sorting lists*

## Using the browse mode to navigate

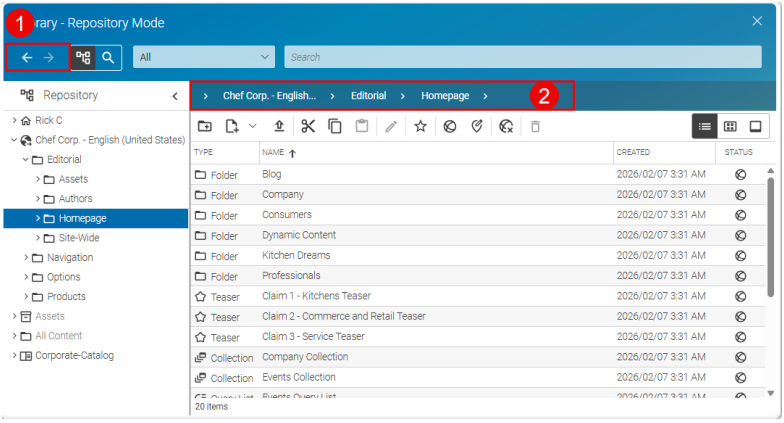


*Figure 4.12. The Tree view*

The tree panel in the library mode displays all the CMS content that matches your permissions. Navigating in the view is like Windows Explorer. You can use the arrows (1) to browse in the navigation history. You can also use the bread-crumb navigation to navigate through the folders. The content type selected in the search and navigation bar has no effect while navigating in library mode.

NOTE

If a folder name is prefixed with an ">" icon, this usually indicates that the folder has subfolders. However, note that the system initially shows all folder names prefixed with an ">" icon to save time. A check for subfolders is made only when the folder is opened.

# 4.3.7 Finding Content Items that Link

Each content item contains a field that shows all content items that link to this item through link list or links in rich text fields. Open the *System* tab and have a look at the *Content Items Linking to This Content Item* field. Like always, you can open the content items with a double click.

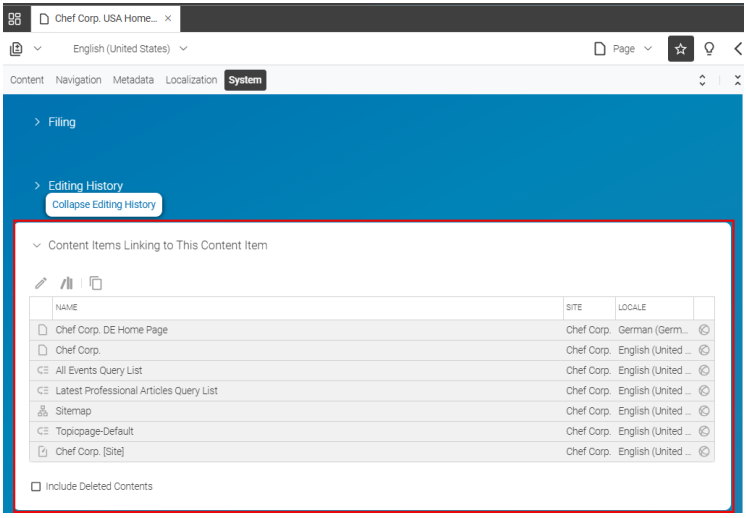


*Figure 4.13. Content items linking to this content item*

# 4.3.8 Opening Content Items From the Form View

If a content item links to other content items in the CMS through a link list, then you can open these directly from the Form View. You can simply double-click the content item or either mark the content and select **Open in tab** from the context menu or you can click the edit icon in the toolbar above the link list.

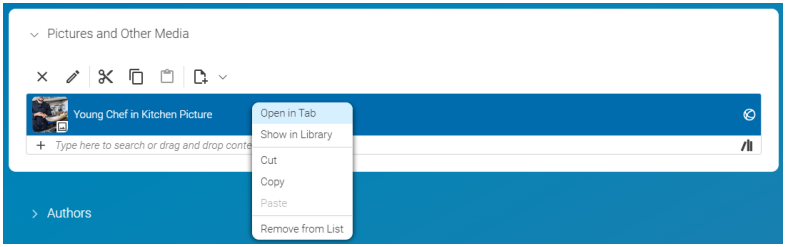


*Figure 4.14. Linklist with context menu*

# 4.3.9 Opening Content Items from the Preview

If you see the preview of a content item that aggregates content from other content items, a Page for example, you can simply open an included content item using a context menu.

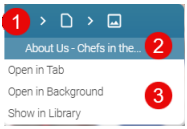


*Figure 4.15. Context menu in the preview*

The headline (1) shows how the item is linked in other content items. The next line (2) shows the name of the content item. On hover, you see the title of the item. You can click on the icon to select the corresponding content item in the preview. In (3) you have the menu items to open the content item.

1. Right click the content item you want to open in the Preview. A context menu opens. It shows the name of the content item in the first row.

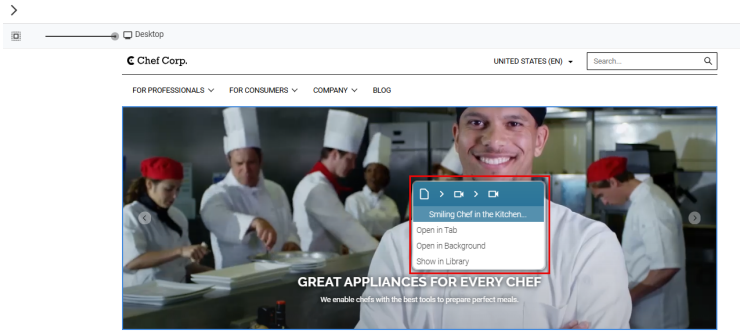


*Figure 4.16. Context menu in Preview*

2. If you want to open the content item and switch directly to the form click "Open in tab". The Preview will show now, the content of the opened content item.

   or

   If you want to keep the preview of the aggregating content item, click "Open in background". A tab with the content item opens but the focus stays on the aggregating content item so you might select other content items, for instance.

   of

   If you want to select the content item in the library, click **Show in Library**.

# 4.3.10 Showing Content Items in the Library

You can move, copy or rename content items using the Library in browse mode. If you want to open a content item in the Library which you are editing in the Form, do a right-click on the tab of the form and select **Show in Library** from the context menu.

Alternatively, click the path in the *System* tab to do so. The Library opens up and the content item is already selected.

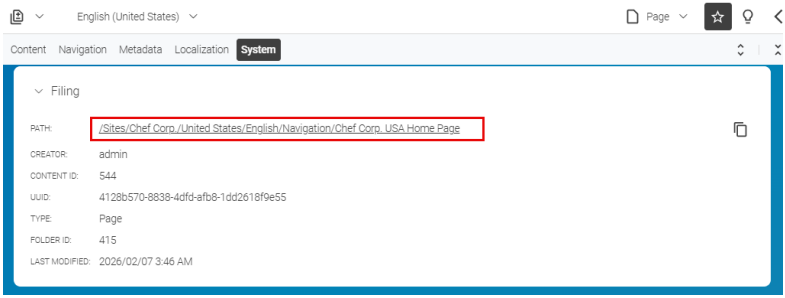


*Figure 4.17. Open in library*

# 4.4 Editing the Content Structure

This section shows you how you can change the structure of your project. Structural changes can involve the following:

- Creating content items
- Moving content items
- Deleting content items

## 4.4.1 Creating Content

One location to create new folders or new content items is the Library. This process involves the following icons:

| Icon | Name |
| --- | --- |
| | Library mode switcher |
| | Create folders |
| | Create content items |

*Table 4.3. Icons for content item creation*

*CoreMedia Blueprint* adds some additional editors to *CoreMedia Studio* and extends existing editors that let you create content in a more comfortable way.

### 4.4.1.1 Creating Content Items in the Library

In order to create content items in the Library, proceed as follows:

1. In the Library, make sure that you are in browse mode.
2. Mark the folder in the tree view where you want to create your new content item.
3. Click the *Create content* icon to create a content item or the *Create folder* icon to create a folder.

4. If you have selected *Create content*, then a dropdown box appears, listing the content types that you can create at this position. Select your chosen content type from the list.
5. A new content item is displayed in the content window and opened in the Form View. Replace the default system name with a name of your choice.

   If the name already exists, then an error message is shown. If you click **[OK,]** the old name is restored. Click the old content name in order to type in a different name.

The content creation process is now complete.

CAUTION

When you close a content item, the system asks you whether you want to accept or reject the changes you have made. "Accept" ensures that the system saves all changes made since the content item was opened. "Reject" restores the content item to its original state before it was opened. For newly-created content items, which you have not yet edited but which were opened when you created them, "Reject" has the effect of deleting the content item.

## 4.4.1.2 Creating Content Items from the Header Bar

*CoreMedia Blueprint* lets you create new content items with two mouse clicks. Simply open the **Create** menu in the Header Bar and select the content item that you want to create. A dialog box opens up in which you have to enter at least the name of the item and the location, where it will be created. The dropdown box of the *Folder* field contains the last used folders, but you can also add a new path into the field. If you click **[Confirm]** the content item opens in the Form and you can start editing.

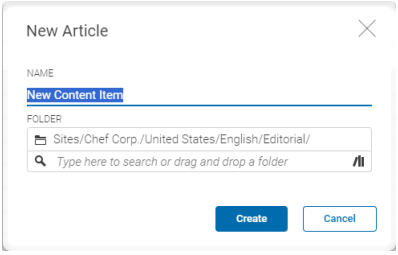


*Figure 4.18. Article creation*

The Page creation dialog has more fields to fill and is described in Section 4.5.2, “Creating a Navigation Node” [165].

# 4.4.1.3 Creating Page Content Item

A Page item is the most important content type of your CoreMedia system. You will use it for different purposes:

- Creating your website structure and navigation (see Section 4.5, “Editing the Navigation Structure” [161])
- Defining the layout of your website (see Section 4.5.1, “Editing the Layout” [161])
- Adding content to your website (see Section 4.5.1.1, “Editing a Page Grid” [163])
- Define settings for your website

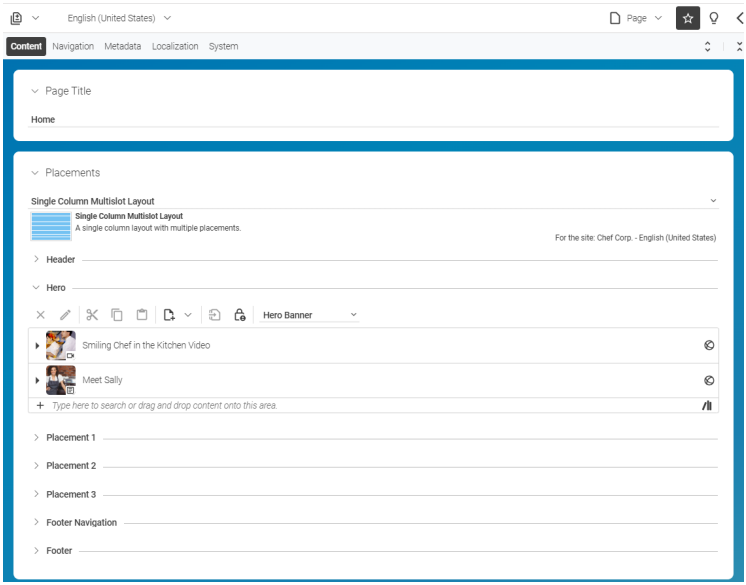


*Figure 4.19. Page form*

The Page content item has five tabs were you can do the following:

**Content** — In this tab, you define the layout and part of the content of the Page as described in Section 4.5, “Editing the Navigation Structure” [161] and

| | |
|---|---|
| | the validity of the Page (see Section 4.6.14, "Time Dependent Visibility" [235]). |
| **Navigation** | In this tab, you add the navigation children of the page. In this tab, you add a title to the page, the navigation children and layout variants. |
| **Metadata** | In this tab, you define `Tag` keywords for the page as described in Section 4.6.16, "Metadata Management" [238], you define an URL Segment for the Page (see Section 4.5.2, "Creating a Navigation Node" [165]), HTML keywords, a favorite icon which is shown in the address bar of the browser, the visibility of the Page (see Section 4.5.4, "Hiding Page from Navigation or Sitemap" [169]) |
| **Localization** | In this tab, you define the localization features of the content item; its locale and its master content item. In addition, derived content is shown. |
| **System** | In this tab, you define settings for your site. In the *Linked Settings* field, you can link to globally defined settings content items and in the *Local Settings* field, you can add local settings as a Struct property. These settings are merged with the settings of parent Pages, where the settings of the child Page has precedence. You can also associate Themes, JavaScript and CSS files with the page. In addition, you will find information about the Page.<br>• The *Filing* field shows you information about the location of the Page, its type, Creator and content ID.<br>• The *Editing History* field shows you the versions of the content item. Here you can check out older versions of the content item.<br>• The *Content Items Linking to This Content Item* field shows the content items which link to the Page. |

# 4.4.1.4 Creating Image Galleries

An image gallery is a content item of type Gallery that combines several images. In order to create an image gallery, select one or more images in the Library and click the **[Create image gallery]** icon. You can change the name and the folder, where the content item will be created.

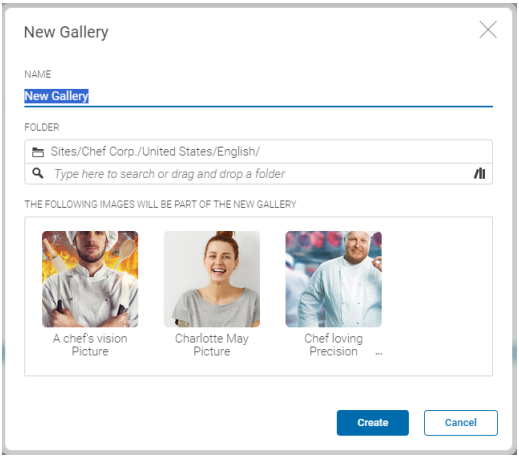


*Figure 4.20. New Gallery dialog*

| Icon | Name |
|---|---|
| | Create image gallery |

*Table 4.4. Icons for managing content*

Click **[OK]** to create the content item. It will be opened in a new form tab.

# 4.4.1.5 Creating Content Queries

A Content Query dynamically selects content items (Articles, Videos, Products, Pictures) that fulfill specific conditions. Content Queries are created in Query List content item. A Query List content item can be seen as a dynamic collection and can be used in all places where Articles and the like are used. In addition, you can add predefined content to specific positions in the result list.

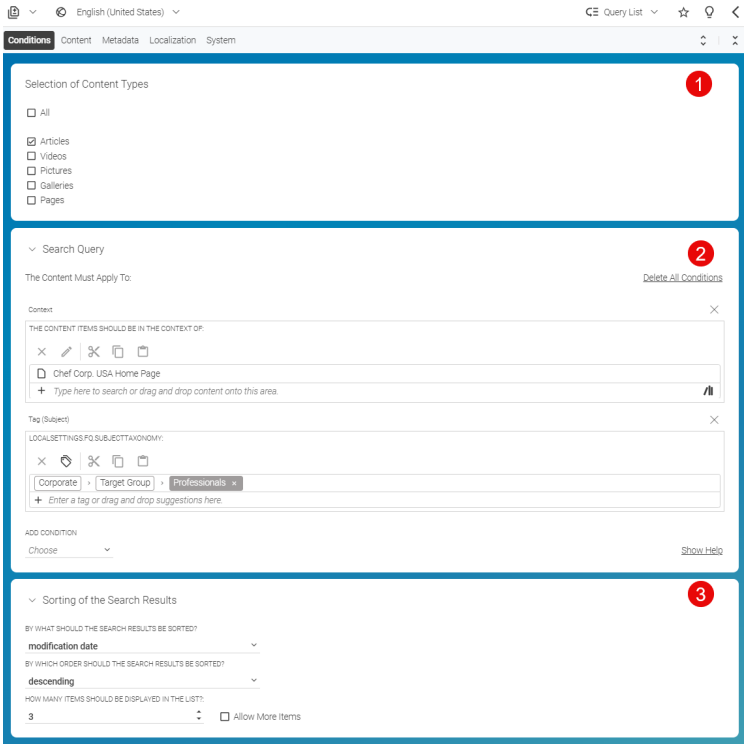


*Figure 4.21. The Query List Editor*

You can use the following condition types (2):

| | |
|---|---|
| **Modification Date** | The last modification date of the content item |
| **Context** | The context to which the content item belongs. |
| **Author** | The author who is attached to the content. |
| **Tag (Subject)** | The subject tags which are attached to the content item. |
| **Tag (Location)** | The location tags which are attached to the content item. |
| **Tag Context** | This condition has no parameters, because the tag is dynamically calculated during the request of the site. If the request contains a keyword, only content items that contain this keyword are selected. This way, you can |

show, for example, content that is relevant to the interests of the current user.

The tag context condition is used in topic pages (see Section 4.4.1.7, "Creating Topic Pages" [154]). When you click, for example, the tag of an Article, then the topic page opens with content which also has this tag in its metadata.

You can sort the results of the Query List by the following attributes:

| | |
|---|---|
| **modification date** | The date of the last modification of the content |
| **creation date** | The date of the first creation of a content. For a content on the live side, this is the date of the first publication. |
| **externally displayed date** | The date which you can set with the *Displayed Date* editor (see Section 4.6.13, "Setting a Displayed Date" [234] for details). |
| **title** | The title of the content items. |

## Creating a Query List

In order to create a new Query List, proceed as follows:

1. Create a new Query List content item
2. Select in the *Selection of content types* field (1) which content items should be found by the query.
3. Select a condition type from the dropdown list in the *Possible conditions* field (8).

   A new empty condition field will be added below the first condition field.
4. Follow the instructions in the first condition field and add a condition.
5. If required, select more condition types. A content item must fulfill all conditions to be found.
6. Configure the sorting and number of results in the *Sorting of the search query* field (3).
7. If you want, add specific content to a defined position in the result list in the *Content* tab. Drag content into the *Items with Fixed Position* field. Click the small triangle (1) to the right of the content in order to open the element and select the position of the content in the *Fixed Position* field.

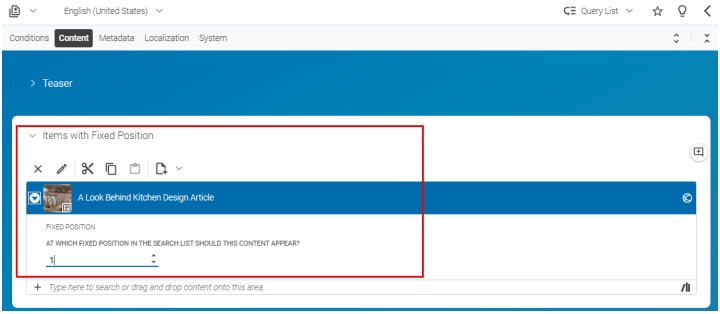


*Figure 4.22. Items with fixed position*

The results of the query are shown. If you have selected an item at a fixed position, it appears at just this position.

# 4.4.1.6 Uploading Files

*CoreMedia Blueprint* lets you upload files from your file system into the CoreMedia repository.

You have three ways to upload files:

- Create a new content item of the required type and drag the file onto the content. This way is described in Section 4.4.1.1, “Creating Content Items in the Library” [144].
- Use the upload dialog which automatically creates a new content item for your file. The type of the created content item depends on the MIME type of the file. For an image, for example, a Picture will be created.
- Directly drag a file into the Library or a link list which automatically creates a new content item. The type of the created content item depends on the MIME type of the file. For an image, for example, a Picture will be created.

*MIME type, content type mapping*

The mapping between the MIME type of the file and the created content item is defined in the *Upload Settings* settings item in `/Settings/Options/Settings`.

*Uploading Word documents*

An uploaded Word document is a special case. Studio analyzes the Word document and creates an Article which contains the text from the document in the *Article Text* field. The *Article Title* field is filled with the filename. If the Word document contains images, Studio creates Picture items for the images and links them from the *Pictures and Media* field of the Article.

*Using the uploaded filename of a Download content*

When a file is uploaded and a content of type Download is created, the filename of the uploaded file is stored in the property *File Name* of the Download content. The filename can be used for creating links in the *CAE* which can be enabled by setting the settings item `useCMDownloadFilename` to `true` either directly in the respective Download content or in its parent Channel hierarchy.

| Icon | Name |
|---|---|
| | Uploading files |

*Table 4.5. Icons for managing content*

## Drag and Drop into the Library or Link List

The easiest way to upload files is to drag them directly in the Library or into an appropriate link list.

1. Open the Library and select the folder in which you want to create the content item for the file.

   or

   Open a content item and the tab which contains the link list to which you want to add the content item with your file.

2. Drag the file(s) onto the link list of the content item or in the folder in the Library.

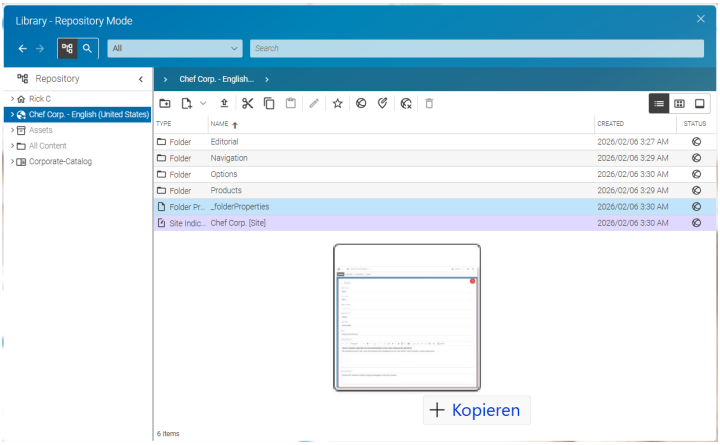


*Figure 4.23. Drag file in Library*

You can drag and drop more than one file simultaneously where the files can even have different types. However, when you drag the files into a link list, and the list does not support the type of the created content item, you will get a warning and the operation fails.

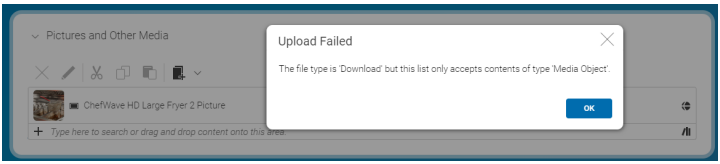


*Figure 4.24. Upload document with wrong MIME type into a media link list*

Studio creates content items for all files, where the type depends on the MIME type of the file. If you dragged the files onto a link list, the created files are automatically linked from the link list and the files are created in the same folder as the link list content item. The files will not be opened automatically.

## Using the Upload Dialog

In order to upload files using the upload dialog, proceed as follows:

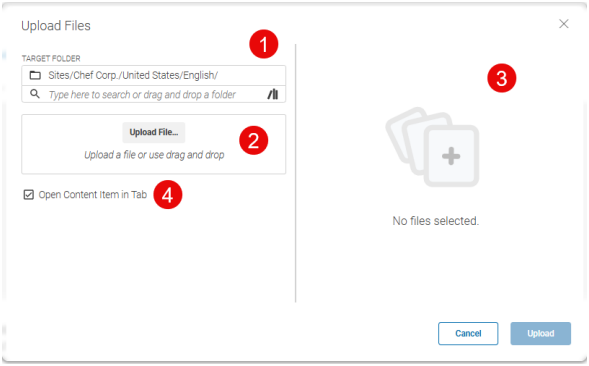


*Figure 4.25. Upload dialog*

1. Open the upload dialog from the **Upload** menu in the Header bar(see Section 4.4.1.2, "Creating Content Items from the Header Bar" [145]) or click the **[Upload files]** icon in the Library or Dashboard. The upload dialog opens.
2. The *Target Folder* field (1) shows the default path. You can edit the path.
3. Drag the file onto the drop area (2) of the dialog. The field (3) appears and the *Content name* field will automatically be filled with the name of the file.

4. You can add more files to the dialog in order to do a bulk upload. The files need not to have the same MIME type.
5. If you want to have the new content item(s) opened in a form tab, then check the *Open content in tab* checkbox (4). Otherwise, the content item(s) will be checked in and not opened.
6. Click **[Upload]** in order to create the content items.

The content items will be created in the target path. If you have checked *Open Content Item in Tab*, the items will be opened.

# 4.4.1.7 Creating Topic Pages

Topic pages are a popular feature on most websites. They show existing content of the website but rearranged in a way that only content related to a specific topic is shown. This way, users might find, for example, all your press releases on one page.

In *CoreMedia Blueprint* topic pages are populated with content that is tagged with a specific keyword. See Section 4.6.16, “Metadata Management” [238] for details.

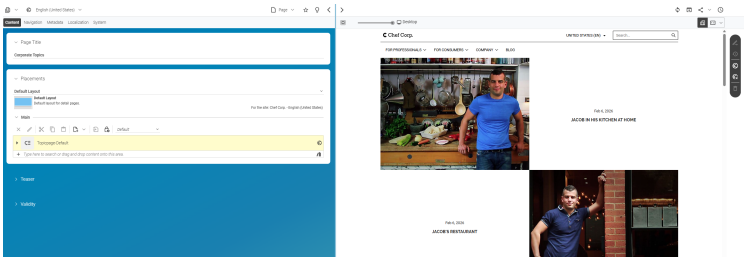

*Figure 4.26. Topic page for keyword Corporate*

## Context of a topic page

As you can see in Figure 4.26, “Topic page for keyword Corporate” [154] a topic page does not only contain the tagged content in the "Corporate" part of the site but also contains a navigation, sidebar and other content. This content comes from the context in which your topic content is shown. In principle, this is a content of type `Page` which contains a placeholder for the topic content and the additional content such as navigation and sidebars.

*Location of default topic page*

Each site has a default `Page` content for all topic pages which is defined in the `Settings` content "TopicPages" of your site below `<SiteName>/Op`

`tions/Settings/TopicPages`. The screenshot shows a default topic page with the highlighted placeholder in the "Main" section.

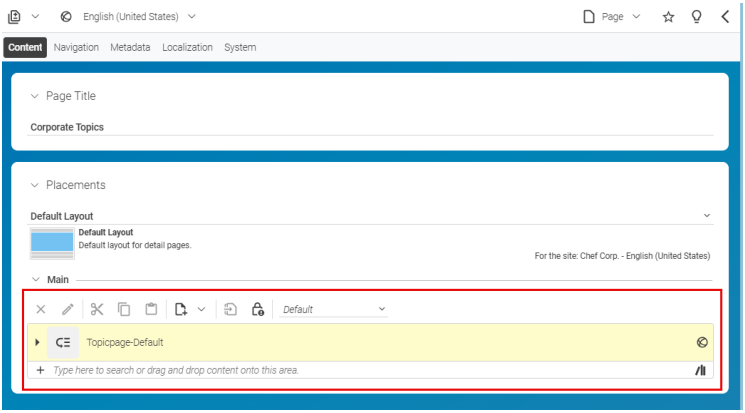


*Figure 4.27. Default topic page*

If you want to show a topic page in a custom context, for a special campaign for example, you have to create your own context page as described in section “Creating custom topic page” [156];

## Linking to a topic page

You have to add the topic page to your site, so that a customer can access it. To do so, add the tag to the tags of the site, drag the appropriate `Tag` content item as a link target into a RichText field or to a position of the Page content where the link should appear. When a user clicks this link, the topic page will open up. In Figure 4.28, “Link to a topic page as a tag” [155] the "Press" content item of type `Asset Category` is added as a link to a *Subjects* field. When you click the button, the "Press" topic page will be opened.

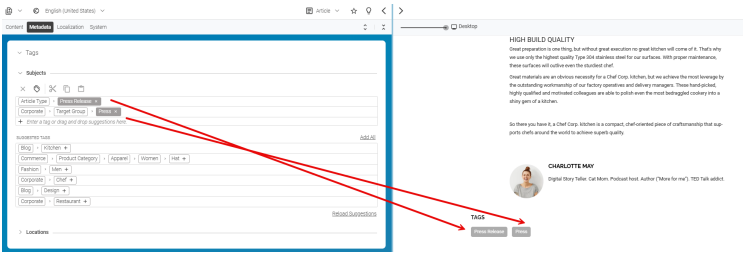


*Figure 4.28. Link to a topic page as a tag*

## Creating custom topic page

You can create a custom `Page`, different from the default topic page, for a specific keyword. This custom page is site specific so you could have a different layout for a German and English site, respectively. To do so, use the topic pages extension as follows:

1. Open the *Main* menu and click **Topic Pages**. The *Topic Pages* UI opens as shown in Figure 4.29, “Topic page creation dialog” [156].

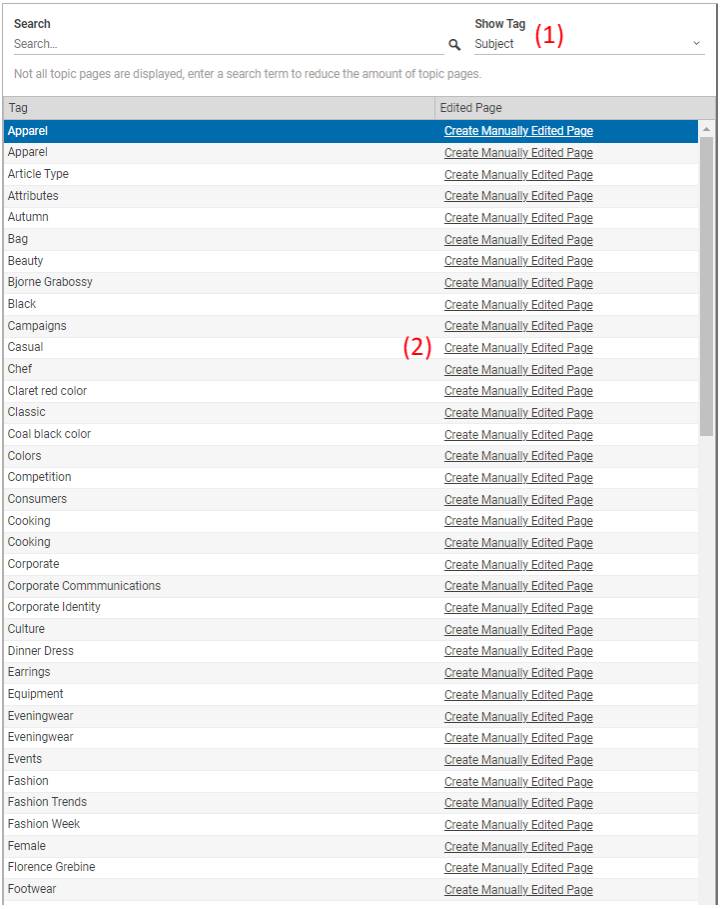


*Figure 4.29. Topic page creation dialog*

2. Select the Taxonomy from which you want to choose the keyword in the *Show Tag* dropdown list (1).

   A tag can only have one manually edited page per site. If such a page is already there, it is shown in the UI.

3. Click **[Create Manually Edited Page]** (2) at the keyword for which you want to create a topic page.

   The topic page content item opens up. It is automatically linked to the default topic page content item of your site and inherits the contents and layout of this content item.

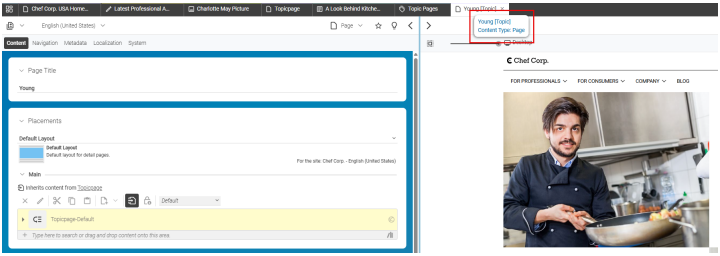


*Figure 4.30. Custom topic page for the keyword "Young"*

4. Adapt the new topic page content item to your needs but do not remove the default content Topicpage-Default of the *Main* field in the *Placements* tab.

Now, you are done. When you link to the new topic page (see section "Linking to a topic page" [155]) and click the link, you will see the custom topic page.

# 4.4.2 Moving, Copying and Renaming Content Items

You can move, copy or rename content items (content items or folders) in the library mode. If you do not have the right permissions, an error message is shown and you cannot carry out the action.

## Moving content items

You can use drag and drop to move content items in the Library tree view. To do so, click your chosen content item and keep the mouse button pressed as you drag the cursor to the new folder where you want to store the content item. Folders to which you can move the items are highlighted when you move over

them with the mouse cursor. As known from Windows, you can use <Ctrl> and <Shift> keys to select more items.

## Copying content items

You can copy content per drag and drop with pressed <Ctrl> key. When you copy a folder, all contained content items will also be copied, thus all sub folders and their content items are included. If you want to copy several resources simultaneously – for example, a folder with its contained content items – there is a feature to consider. All links inside the resource set will automatically be directed to the copied resource.

**Example**: You want to copy a folder containing two content items A and B; Content item C is in another folder and will not be copied. A contains a link to B and B a link to C. You paste the content items as A' and B' into a new Folder. Now A' contains a link to B'; B' links to C.

Copying content items is as easy as relocating content items. To do so, click your chosen content item, keep the mouse button pressed and press the <Ctrl> key as you drag the cursor to the new folder where you want to store the content item. An add icon next to the dragged content object indicates that the drag will lead to a copy instead of a relocation of the content object.

## Renaming content items

You can either rename content items in the Library or in a form. In the form right-click on the tab and select **Rename** from the context menu.

In the Library, proceed as follows:

1. Mark the content item or the folder in the Library tree view.
2. Click the content item's name.

   An input box appears in which the name is marked and can now be changed.
3. Enter the new name.
4. Then press **<Enter>** or click outside the input box in order to apply your changes.

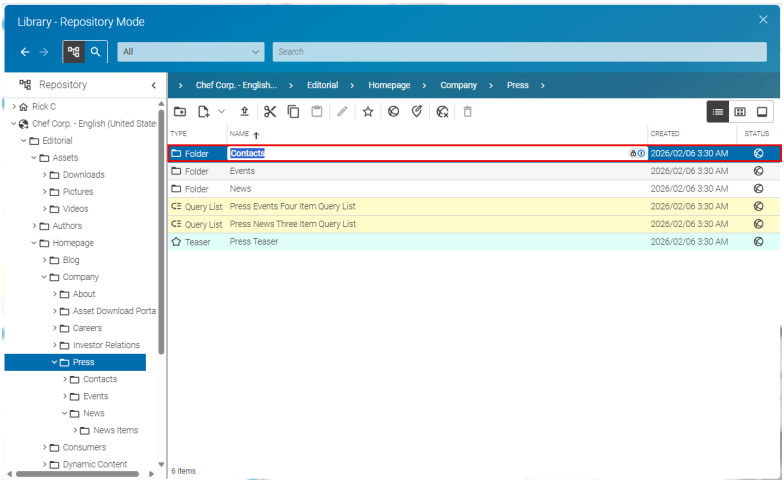


*Figure 4.31. Changing the name of a folder*

# 4.4.3 Deleting and Restoring Content Items

If you don't need a content anymore you can either remove it from the website and keep it in your repository or delete it from the repository. If you want to delete a content item from the website, you have to withdraw it first. For details on withdrawal see Section 4.7.2.3, “Withdrawing Content” [258].

A deleted file is moved into the CoreMedia recycle bin. Usually, the recycle bin is cleaned on a regular basis. As long as the recycle bin has not been cleaned, you can restore a deleted file.

| Icon | Name |
| --- | --- |
| | Delete |
| | Restore |

*Table 4.6. Icons for Deletion and Restoring*

## Deleting Content

In order to delete a not-published content proceed as follows:

1. Select the content in the Library.
2. Click the *Delete* Icon in the toolbar of the Library.

or

2. Open the context menu with a right-click on the content and select *Delete*.
3. In both cases confirm the warning message that opens up.

The content has been deleted from the production environment.

## Restoring Content

In order to restore a content item from the recycle bin proceed as follows:

1. Open the Library and switch to search mode (see Section 4.3.6, “Navigating in the Library” [138] for more details on search in the Library).
2. Open the *Filters* panel and in the *Status* field only select *Deleted*.

   All content in the recycle bin is shown. If necessary, you can limit your search as usual.
3. Select the content item(s) that you want to restore and click the icon or select **Restore** from the context menu.

   The content item will be restored at its original location, which is shown in the footer of the Library.

# 4.5 Editing the Navigation Structure

*Building the navigation structure*

This section describes how you create and edit the layout and structure of your website. To this end, *CoreMedia Blueprint* supports a hierarchical, multilevel website navigation structure with one root page and several sub pages. See Section 2.3, "Content and Site Model" [14] for more details.

## 4.5.1 Editing the Layout

CoreMedia Blueprint feature

This chapter describes how you can edit the layout of your website. See Section 2.3.3, "Layout of a Website" [18] for details about the concepts of the CoreMedia layout functionality.

| Icon | Name |
|---|---|
| | Lock content |
| | Inherit content |

*Table 4.7. Layout icons*

### Locking content

Locking content means that sub pages of the locking page can not edit the content of the locked placement. This way, you can enforce, for example, a common sidebar for all pages.

1. Open the *Content* tab of your page content item.
2. Click the icon in the toolbar of the placement you want to lock.

If a sub page contains a placement with the same name as the locked one, then it will be grayed out and can not be edited. A message indicates the state of the placement (see Figure 4.32, "Locked Navigation Bar placement in a sub page" [162]).

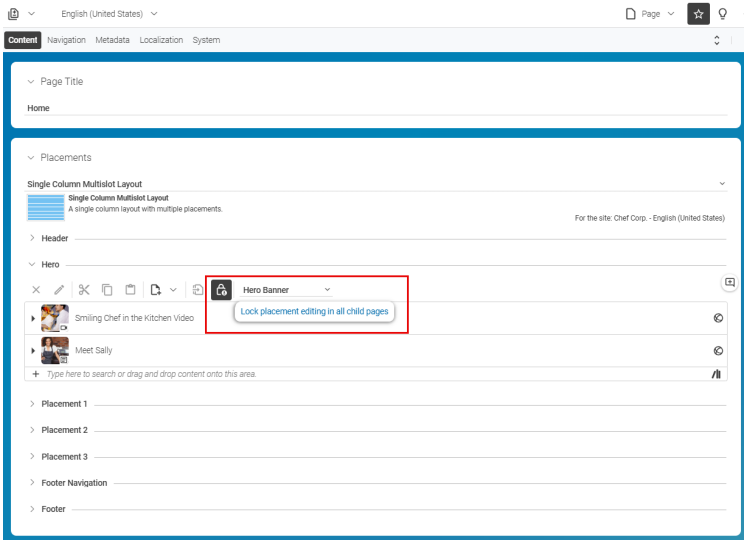


*Figure 4.32. Locked Navigation Bar placement in a sub page*

## Inheriting content

A sub page can inherit content from the direct parent page when one of the following conditions is fulfilled:

- The sub page uses the same page grid as the parent page
- The page grid of the sub page defines one or more placements with the same names as in the parent page

1. Open the *Content* tab of the child page.
2. Click the icon of the placement.

The content of the parent page appears in the link list and the link list is grayed out, so you can not edit the content.

If you want to edit the link list, click again. The content remains in the link list and you can edit it.

*Enable editing*

WARNING

**Incompatible page grid changes**

When a sub page inherits content from its parent page and the page grid of the parent page is changed then the content of the sub page might become invalid. For example, the page grid layout of the parent page might not define a placement name like the one from which the sub page inherits its content. If this is the case, you have to reconfigure all child pages. There is no detection for invalid parent-child layout inheritance.

# 4.5.1.1 Editing a Page Grid

Editing the page grid of a Page comprises several tasks:

- Selecting a page grid
- Adding content to placements
- Locking content
- Inheriting content

## Selecting a page grid

Your page needs a page grid in order to place the content.

Open the *Content* tab of the Page content and select the Page grid in the *Page Layout* dropdown list.

The Page grid editor will show link lists for each placement of the page grid, where you can add content to.

## Adding content to placements

The Page grid editor shows for each placement of the page grid a link list where you can add existing content or create new content.

Section 4.6.5, “Editing Link Lists” [201] describes how you add or create content in the link list.

# 4.5.1.2 Adding a Layout Variant

You can add a layout variant to a placement in a Page content item or to another content item, such as Article or Collection.

## Adding layout variant to placement

1. Open the *Content* tab of your page content item.
2. Open the layout variant dropdown box in the toolbar of the placement and select the layout variant of your choice.

It is possible that a given site does not provide any layout variants. In this case, no layout variant drop down is shown.

If a placement is defined for the site, but the placement or the layout does not support it, you might see no difference on the rendered page.

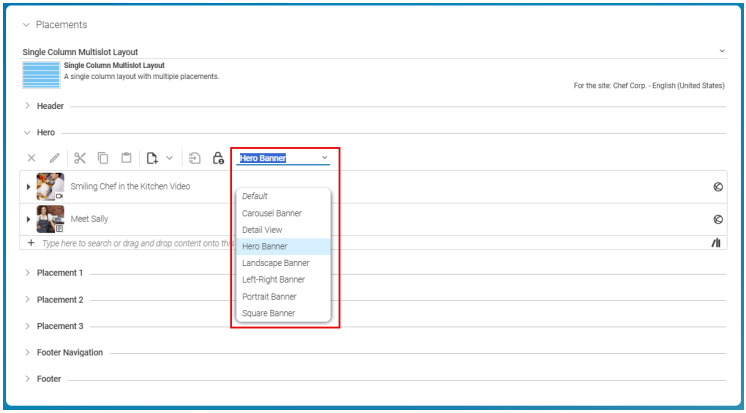


*Figure 4.33. Selecting layout variant in placement of a Page content item*

## Adding layout variant to content

Open the *Content* tab of the content item and select the layout variant from the dropdown box in the *Layout Variant* field.

You can see the new layout in the preview.

# 4.5.2 Creating a Navigation Node

A new navigation node is a Page content item that you add to a *Navigation Children* link list of the parent Page content item. Before you can do so, you have to check two points:

- It is not allowed that two Pages in the same *Navigation Children* link list have the same value in the field *URL Segment* of the *Metadata* tab. The CoreMedia system uses this entry to create the URL to the page and when two pages have the same entry you would not get unique URLs for both Pages.
- Pages inherit some layout settings from their parents. So, check if the layout of the new Page fits with the layout of the parent Page. See Section 4.5.1, “Editing the Layout” [161] for details about layout settings.

You can use the *Create* dialog to create a new Page or the *Create from Template* dialog to create a new Page or navigation hierarchy from a template:

## Create content

1. In the Header Bar open **Create** and select **All|Page**. The page creation window opens up.

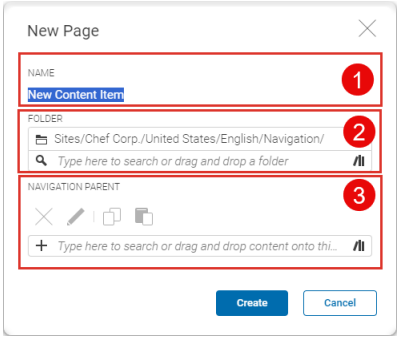


*Figure 4.34. Page creation dialog*

2. Fill the properties of the dialog with the appropriate values as described in Table 4.8, “Properties for the Page” [165].

| Property | Description |
|---|---|
| Name [1] | Enter the name of the Page content item you want to create. |

| Property | Description |
| --- | --- |
| Folder [2] | Enter the folder where you want to create the page. If the folder does not exist you will be asked if it should be created. |
| Navigation Parent [3] | The parent page of the current page. This defines the position of the page in the navigation structure. The property must be filled before you can select the *Page Layout*. |

*Table 4.8. Properties for the Page*

3. Click **[Create]** to create the new page.

   The new Page opens up and is integrated into the navigation structure. The Placements in the *Placements* tab inherit the settings of the parent page because you haven't had the opportunity to fill them with your own content.

4. Now you can add your content to the placements and header and footer content to the *Header Objects* and *Footer Objects* link lists of the *Content* tab.

## Create from Template

You can use the *Create from Template* menu item in order to create a new Page from a template. This means, that the new page has already a structure and might contain links to existing content. The template might link to other pages so that you can create a complete navigation hierarchy at once. See Section 6.1.10, "Create from Template" in *Blueprint Developer Manual* to learn how to add your own templates.

Proceed as follows:

1. In the Header Bar open **Create** and select **Page from Template**. The *Page from Template* window opens up.

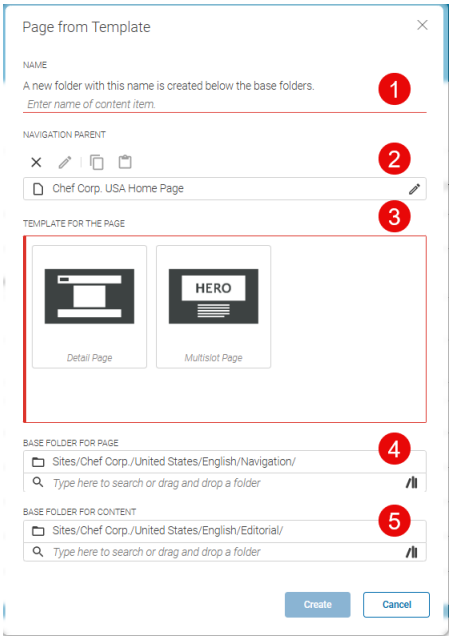


*Figure 4.35. Page from Template dialog*

2. Fill the properties of the dialog with the appropriate values as described in Table 4.9, "Properties for the Page" [167].

| Property | Description |
|---|---|
| Name [1] | Enter the name of the Page content item you want to create. The name will also determine the name of the folder created inside the base folders. |
| Navigation Parent [2] | The parent page of the current page. This defines the position of the page in the navigation structure. |
| Template for the Page [3] | The available templates for the active site. |
| Base Folder for Page [4] | This is the base folder for the template page. By clicking **[create]**, a new folder with the name entered above will be created inside the base folder. This new folder must not exist yet. By default, the selected base folder is the navigation path of the active site, followed by the name entered above. |

| Property | Description |
| --- | --- |
| Base Folder for Content [5] | This is the base folder where linked editorial template content should be copied to. By clicking **[create]**, a new folder with the name entered above will be created inside the content base folder. By default, the selected content base folder is the editorial path of the active site, followed by the name entered above. |

*Table 4.9. Properties for the Page*

3. Click **[OK]** to copy the template content and link it to the navigation parent.

   The new Page item opens up and is integrated into the navigation structure. The page is already filled with standard content, depending on the selected template.

4. Now you can add content to the page.

# 4.5.3 Adding a Sitemap

CoreMedia Blueprint Feature

You can add a `Sitemap` item to nearly all fields of a Page content item where you can add content, for example *Footer Objects* or *Sidebar*. Nevertheless, it probably makes most sense to add it to the footer.

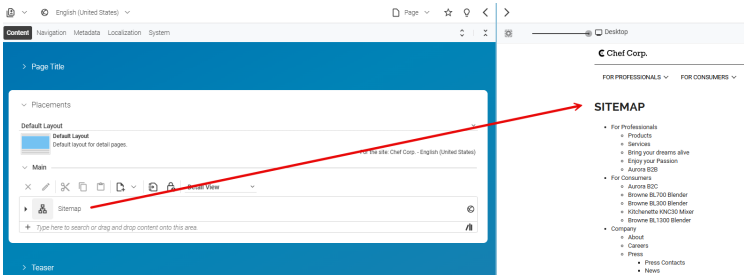


*Figure 4.36. Adding a Sitemap*

In the CoreMedia Corporate example page, the `Sitemap` content is not directly linked to the Corporate page. Instead, there is a Sitemap Page content that contains the `Sitemap` content item. This is due to styling issues.

In order to create a sitemap do the following:

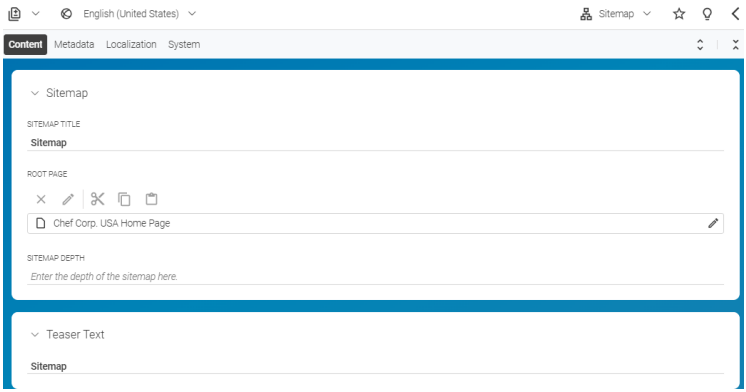


*Figure 4.37. The Sitemap type*

1. Create a new content item of type `Sitemap`.
2. Add a name to the *Sitemap Title* field. This name is shown above the site map.
3. Drag the `Page` to the *Root Page* field that should be the starting point of the site map.
4. You can add a teaser text to the *Teaser Text* field. This text is shown when you use the site map as a teaser.
5. You can limit the depth of the displayed site map hierarchy. Enter the maximum depth into the *Sitemap Depth* field. The default value is "3".

Now you can use the new `Sitemap` item in your site.

## 4.5.4 Hiding Page from Navigation or Sitemap

If you have a page in your site that should not appear in the navigation or sitemap, then you can hide it. To hide the Page in both places open the *Navigation* tab and expand the *Visibility* panel. Here, check the checkbox *Hide in Navigation and Sitemap*.

Check *Only hide in Sitemap* when you want to hide the Page only from the sitemap. Check *Exclude from Search and XML Sitemap* when you want to hide the page from search and the XML sitemap.

# 4.6 Editing Content

This section describes how you can edit the various field types contained in a content item.

- Section 4.6.1, "Checking out and Checking in Content Items" [171] describes how you check out and check in a content item.
- Section 4.6.2, "Comparing Versions" [173] describes how you compare content versions
- Section 4.6.3, "Rich Text Editing" [175] shows you how to create formatted text.
- Section 4.6.4, "Editing Struct Properties" [194] describes how you edit struct properties. This is a special field type which is mostly used for settings.
- Section 4.6.5, "Editing Link Lists" [201] shows you how to edit links to other content items using link lists.
- Section 4.6.6, "Managing Files" [206] shows you how you can insert binary data (images, video, audio ...) into your content items.
- Section 4.6.7, "Editing Images" [207] describes how you can edit images in *Studio*. For example, how you crop or flip an image.
- Section 4.6.8, "Editing Image Maps" [220] describes how you edit image maps.
- Section 4.6.9, "Advanced Teaser Management" [224] describes how you manage text and call-to-action buttons on a teaser image.
- Section 4.6.10, "Editing 360°-Views" [231] describes how you edit 360°-Views.
- Section 4.6.11, "Editing Shoppable Videos" [231] describes how you edit shoppable videos
- Section 4.6.12, "Editing Top-N Lists" [233] describes how you edit Top-N lists. A feature from *Elastic Social*, which shows, for example, the 10 best rated articles.
- Section 4.6.13, "Setting a Displayed Date" [234] describes how you can add a fix publication date to a content.
- Section 4.6.14, "Time Dependent Visibility" [235] describes how you set a time range in which a content item should be shown. It also describes how you can check this content in the preview.
- Section 4.6.15, "Working with Authors" [238] describes how you work with authors.
- Section 4.6.16, "Metadata Management" [238] describes how you categorize content and how you can manage taxonomies.

# 4.6.1 Checking out and Checking in Content Items

A content item in *CoreMedia Studio* can only be edited by one user at the same time. Therefore, editors have to check-out an item before they can start working and they have to check-in the item afterwards. The latter one will automatically save all changes. Alternatively, editors can revert their changes and restore the previous status of a content item.

| Icon | Name |
|---|---|
| | Apply changes |
| | Restore content |
| | Revoke changes |

*Table 4.10. Apply changes icons*

## Checking out a Content Item

In order to check-out a content item for exclusive editing, simply open the content item and start working. The item will be automatically checked-out.

## Checking out an old version

You can not really check-out and edit an old version of a content item but you can create a new version, that is based on the old version. The new version contains exactly the content of the old version.

1. Open the *System* tab of the Form and select the version you want to recreate in the *Editing History* field.
2. Click the *Restore Content* icon.

The Form shows now the content of the old version.

WARNING

Danger of data loss

If you have already an open version of the content item and you have not saved your current changes and you restore an older version of the content item, then the current content of the item will be overwritten after a warning. So you loose all current changes.

## Revoke changes

If you want to revoke all changes since the last check-out and create no new version, proceed as follows:

1. Click the *Close* icon of the form.
2. A dialog opens. Click **[Revert]**.

or

1. Click **[Revert changes]** in the Action Bar.

The form will be closed and all changes since the last check-out are deleted.

## Checking in a content item and applying changes

If you want to stop working and create a new version of the content item, you have two options. Either you save the changes and close the form or you save the changes and let the form open. With both options, the content item will be checked-in and can be checked-out by other editors.

### Checking in and closing a content item

1. Click the *Close* Icon of the form.
2. A dialog opens. Click **[Apply]**.

The form will be closed and all changes since the last check-out are saved.

### Checking in and closing a content item

In order to save your changes and to check-in the content item, simply click the *Apply changes* icon in the Action bar.

## Closing multiple forms

If you want to close several forms at once, open the context menu with a right-click on a forms tab. Select **Close Other Tabs** in order to close all other forms except of the current one or select **Close All Tabs** to close all forms. Select **Keep Edited Tabs** to keep all forms with unsaved changes open and to close all other forms.

If you have unsaved changes in one or more forms you will be asked if you want to save or discard the changes.

# 4.6.2 Comparing Versions

In *CoreMedia Content Cloud* you can compare your current working version of a content item with older versions.

## Open the comparison view

In order to compare two versions, click the icon. The view shows the two versions side-by-side. Changed fields are highlighted with a green border.

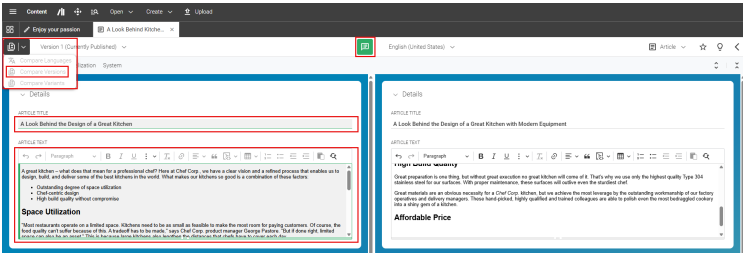


*Figure 4.38. Comparison view*

## Getting a list of changed fields

Click the icon to open the list with changes. You can click each change to jump to the corresponding field.

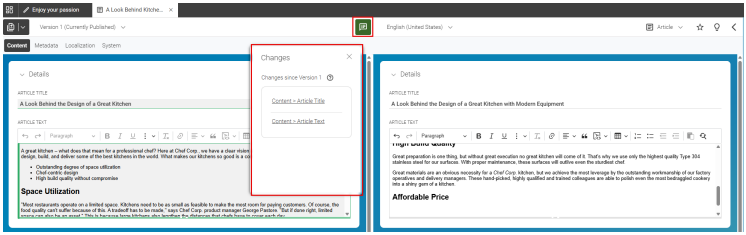


*Figure 4.39. Get the list of changes*

## Comparing rich texts

While most updates to content items are expected to affect rich text properties, changes within these values are particularly difficult to spot. This is why the rich text fields in the comparison view provide a detailed change highlighting. Additions (1), removals (2) and formatting changes (3) within the rich text are all highlighted individually.

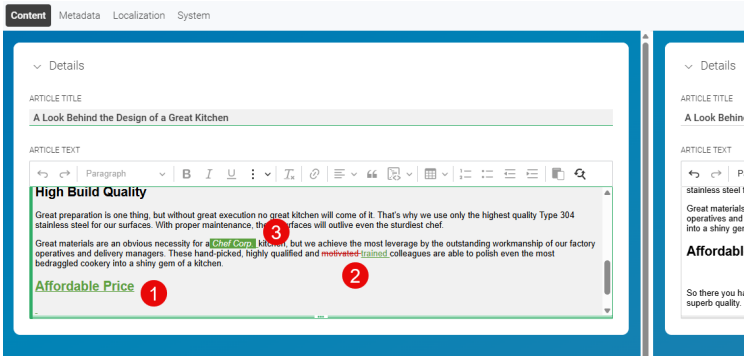


*Figure 4.40. Rich text change highlighting*

## Select a different version

If you want to compare your current working version with a different version, simply click the version field in the header of the form. A list opens where you can select another version from.

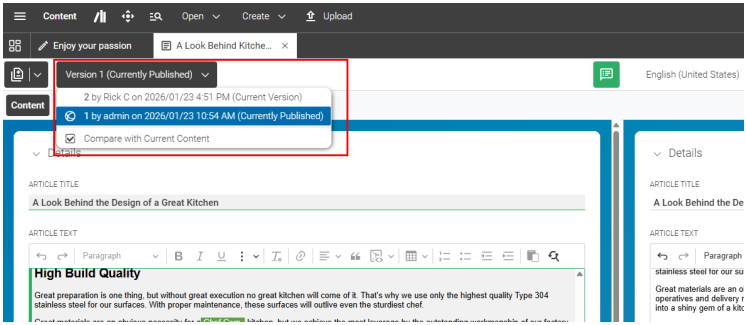


*Figure 4.41. Selecting another version*

# 4.6.3 Rich Text Editing

In *Studio*, you can edit fields containing two different types of text: Simple text fields (1), which are used for short descriptions or to specify a language, for example, and rich text fields (3), which are used for full-length articles, or the like.

In simple text fields, you can enter a specific number of characters without formatting. In rich text fields, you have many more possibilities: you can format your text, insert tables, add links to other content items and much more besides. The following subsections show you how you can manage your content in rich text fields.

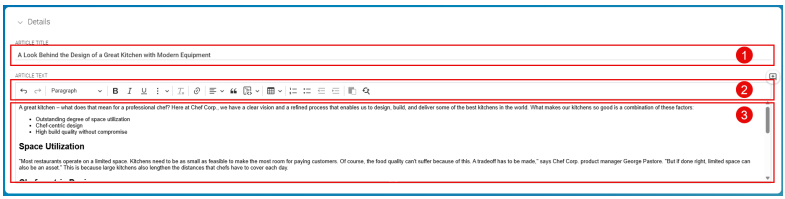


*Figure 4.42. A simple text field and a rich text field*

You can use the integrated WYSIWYG editor to edit text in a way that is familiar to other text editors. When editing text, the following options are available to you (2):

- Undo/redo last editing action
- Apply paragraph styles
- Bold text
- Italic text
- Underline

- Behind the three dot icon menu: strikethrough, subscript, superscript, and inline code
- Remove format
- Link
- Text alignment: left-aligned, right-aligned, centered, or justified
- Block quote
- Insert code block
- Insert table
- Numbered list
- Bulleted list
- Increase or decrease text indents
- Paste content
- Find and replace
- Source code editing (only for administrators)

NOTE

Internally, rich text is stored as XML. There might be situations, for example, text written in older CoreMedia versions or text imported through external tools, where you have to edit this XML directly. By default, an administrator can switch to an XML view and edit the XML source in this view. See Section 3.7, "Editing Rich Text Source Code" [118] for more details.

## 4.6.3.1 Autoformatting Text

By default, the rich text field supports an autoformatting feature for text. This means, you can use Markdown syntax to format your text. When you start, for example, a paragraph with a hash sign (#) and a space, the paragraph will automatically be shown as a heading 1.

Depending on the setup of your CoreMedia system, this feature might be disabled.

If enabled, you can use the following Markdown shortcodes in your text. The text behind the shortcode in the Syntax column is only meant as an example.

| Format | Syntax |
| --- | --- |
| Headings 1 - 3 | # Heading 1<br>## Heading 2<br>### Heading 3 |

| Format | Syntax |
| --- | --- |
| Bullet list | * First item<br>or<br>- first item |
| Ordered list | 1. First item<br>or<br>1) First item |
| Block Quote | > Text to quote |
| Code block | ``` Code block text |
| Bold | **Bold Word** or __Bold Word__ |
| Italic | *Italic word* or _Italic word_ |
| Code | `Inline code` |
| Strikethrough | ~~Strikethrough text~~ |

*Table 4.11. Supported Markdown shortcodes*

### Resetting Autoformatted Text

Sometimes you may want to start a paragraph, for example with a hash, which should not be autoformatted as a heading. In this case, simply press **Backspace** or **Ctrl+Z** after the autoformatting. This removes the formatting and leaves the character symbol, in this case the hash.

## 4.6.3.2 Pasting Content from the Clipboard

*CoreMedia Studio* supports pasting content from the clipboard. This content may be content items from the CoreMedia system, simple text without formatting or text pasted from Word. Most of the Word formats that are supported by the Studio rich text field, such as bold, italic, lists, simple tables, can be copied. Other formats, such as inline color, font size changes, or complicated tables won't work.

### Pasting Content Items

You can copy content items in the Library and paste them into a rich text field.

1. Copy a content item from the Library using the copy icon.
2. Place the cursor at the location you want to paste the content item.
3. Click the icon.

Depending on the content type, the item will be inserted as a link or an image.

### Pasting text

You can paste copied text using the standard keyboard shortcuts.

1. Copy the text you wish to paste to the clipboard.
2. Place the cursor at the location you want to paste your text.
3. Press **Ctrl**+**V**. The text is pasted with formatting intact.

or

3. Press **Ctrl**+**Shift**+**V**. The plain text is pasted.

Copying text from Word without formatting gives slightly different results than copying text from richt-text fields. In principle, it also removes formatting like bold or italic, and also lists. However, it will copying bullets or numbers from list.

## 4.6.3.3 Editing Paragraphs

In *Studio*, you can format paragraphs as follows:

- Applying a particular style
- Formatting as a quote
- Formatting as a list
- Altering the indent
- Specifying paragraph alignment
- Formatting as a code block

| Toolbar Element | Function |
|---|---|
|  | Heading |
| ❝ | Quote |

| Toolbar Element | Function |
| --- | --- |
| | Left-aligned |
| | Right-aligned |
| | Centered |
| | Justified |
| | Numbered list |
| | Bulleted list |
| | Decrease indent |
| | Increase indent |
| | Insert code block |

*Table 4.12. Toolbar Elements*

## Paragraph and Header Formats

1. In the rich text field, position the cursor in your chosen paragraph.
2. Now select the *Paragraph* drop-down menu (1) from the toolbar and select a header format.

   or

   Alternatively, start a line with # or ## or ### followed by a space to create a heading 1, heading 2 or heading 3. To remove a selected header format, select *Paragraph*.

Your paragraph now appears in the new style.

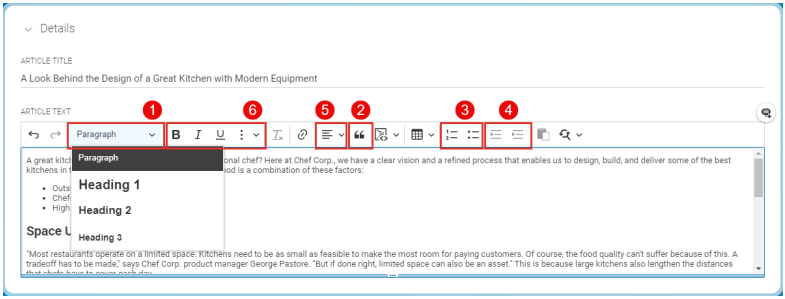


*Figure 4.43. Paragraph styles*

## Formatting as a quote

1. Position the cursor where you want to mark text as a quote.
2. Click the ❝ icon.

   or

   Start a line with > followed by a space to create a quote.

The paragraph is now highlighted with a gray bar and an italic font.

## Formatting as a list

You can format paragraphs as lists. You have the option of formatting paragraphs as bulleted lists or as numbered lists. You can also create nested lists.

1. Mark the paragraphs that you would like to convert into a list.
2. Click the numbering icon or the bullet icon (3).

   or

   Start a line with * or 1. followed by a space to create a bullet list or a ordered list, respectively.

The text of your choice now appears as a list.

## Changing the indention of list elements

1. Position the cursor in your chosen list item.
2. Click the ⇥ icon or ⇤ icon icon.

The list level is now increased or decreased for your marked list item.

## Formatting as a Code Block

You can format text as a code block.

1. Position the cursor in your chosen code item or select the complete code block.
2. Click the icon to format the code block as plain text or click the small arrow to open the language menu and select the language.

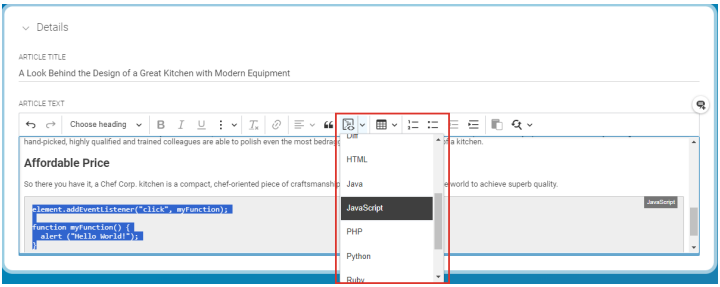


*Figure 4.44. Language menu for code block*

Keep in mind, that you will not get syntax highlighting for the selected language in the rich text field.

## Alignment

You can format the edge of a paragraph as follows:

- Left-aligned
- Right-aligned
- Centered
- Justified

1. Position the cursor in your chosen paragraph.
2. Click the icon and select the appropriate icon from the opening toolbar.

# 4.6.3.4 Using Character Styles

You can style words and characters using the following formats:

- Bold
- Italic
- Underline

- Strikethrough
- Superscript
- Subscript
- Code

Where strikethrough, superscript, subscript and inline code are selected via the three-dot icon.

To do so, the following icons are used:

| Icon | Name |
|---|---|
| **B** | Bold |
| *I* | Italic |
| U | Underline |
| ⋮ | Click to select the next four icons. |
| S | Strike Through |
| $x^2$ | Superscript |
| $x_2$ | Subscript |
| <> | Code |
| $T_x$ | Remove Format |

*Table 4.13. Text formatting icons*

## Formatting text

1. Mark the text that you wish to format.
2. Click the corresponding icon.

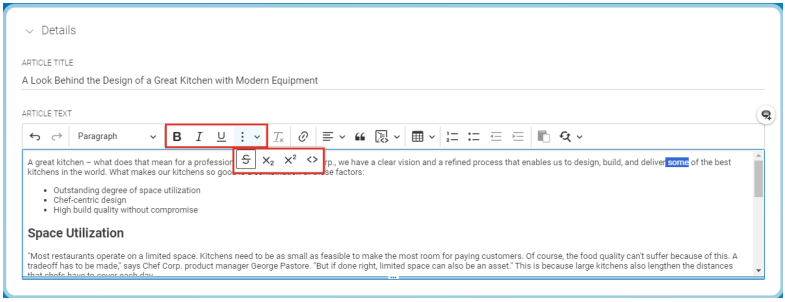


*Figure 4.45. Choose a style*

Your text is now formatted.

### Removing text formats

1. Select the formatted text.
2. Click the $T_x$ icon.

The text formatting has been removed.

## 4.6.3.5 Working With Links

In rich text fields, you can create, edit, and delete links to external websites or to other content items in the repository.

| Icon | Name |
|---|---|
| | Create link |
| | Remove link |
| | Edit link |
| | Open in Current Tab |
| | Open in New Tab |
| | Show Embedded |

| Icon | Name |
| --- | --- |
| | Open in Frame |

*Table 4.14. Link editing icons*

## Creating links

1. Mark the word that you wish to use as your link text or position the cursor at the location where the link should be inserted.
2. Click the icon (1).

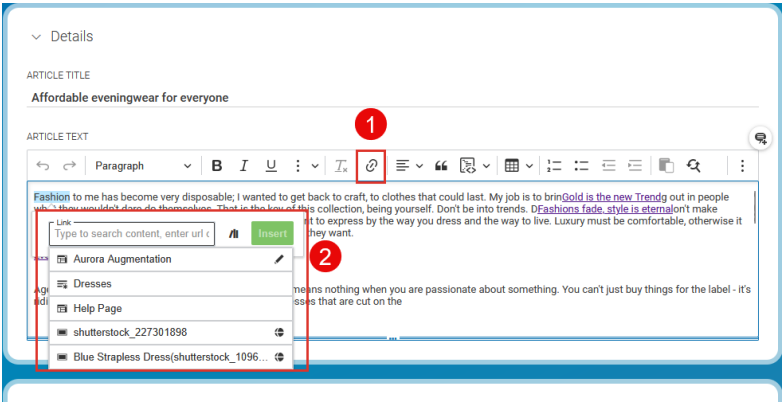


*Figure 4.46. Create a link*

3. You can now enter the link data for external or internal links:
   - **External link:** Enter the address in the *Link* field (2).
   - **Internal link:** Select a content item from the recommendations below the field, or start to type and select a content from the recommendations or click the Library icon and drag the CoreMedia content to which you want to link from the Library onto the *Link* field.
4. Click the Insert button.

The link is now created. You can edit the link further as described in section “Editing Links” [185].

## Editing Links

You can change the target of a link or choose the way the link will be openend.

1. Select the link. The contextual toolbar opens up.

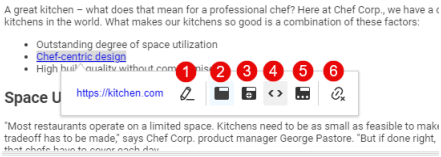


*Figure 4.47. Select more options*

2. You can now choose how to edit your link. Click the edit icon (1) to change the link target. Click the icons (2)-(5) to define how the link target will be openend:
   - *Open in Current Tab* – the target link replaces the web page currently shown
   - *Open in New Tab* – the target link will be opened in a new browser tab
   - *Show Embedded* – the target link will be opened within the current page
   - *Open in Frame* – the target link will be opened in a particular frame on the current page. In this case, you must specify the name of the frame in the *Target* field.
3. When you have edited your link, click anywhere in Studio to close the toolbar.

## Deleting Links

1. Select the link. The contextual toolbar opens up.
2. Click the icon (6).

The link has now been deleted. However, your link text will not be affected.

# 4.6.3.6 Editing tables

You can insert and edit tables in a rich text field.

You can make use of the following functions:

- Creating and deleting tables. You can even insert tables in tables.
- Inserting and deleting rows and columns

- Merge and split table cells

| Icon | Name |
|---|---|
| | Table menu |
| | Insert rows |
| | Insert column |
| | Merge cells |

*Table 4.15. Table editing icons*

## Creating a table

1. Position the cursor at the location where you want to insert a table. You can even insert a table inside a table.
2. Click the *Create table* icon (1).

   A window (2) opens in which you can specify the size of the table.

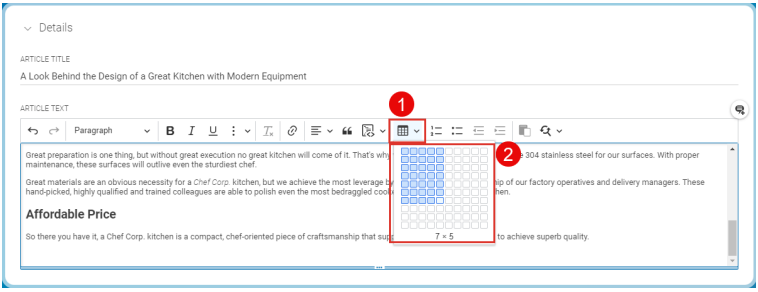


*Figure 4.48. Specify size of table*

3. Hover with the cursor over the window to select the size of the table. Click-left with the mouse in order to create the table.

The table now appears in your rich text field.

## Deleting a table

1. Hover over the table and click into the small square (1). The table is now selected.

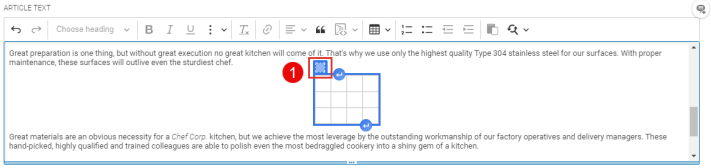


*Figure 4.49. Select table*

2. Press **Del** on your keyboard.

The table and its contents are deleted without further confirmation but you can restore the table with undo.

## Inserting Paragraphs before and after table

You can simply add paragraphs before or after the table in the rich text field:

1. Hover over the table and click either the arrow (1) in order to insert a paragraph before the table or the arrow (2) in order to insert a paragraph after the table.

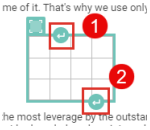


*Figure 4.50. Inserting paragraphs*

## Editing rows and columns

1. Click into the cell in your chosen column or row. The contextual toolbar (1) appears.

*Figure 4.51. Contextual toolbar*

2. Click the icon in order to edit columns or the icon in order to edit rows.

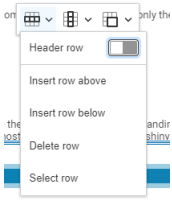


*Figure 4.52. Edit rows menu*

3. From the menu, select the operation you want to perform. When you select **Header row** or **Header column** and you are not in the uppermost row or in the far left column all rows or columns up to your current position will be marked as header.

## Merging and Splitting Cells

You can merge table cells and split table cells either per row or column or you can merge selected cells.

### Merging Selected Cells

1. Hold the left mouse button and select the cells you want to merge. Release the button.
2. From the contextual toolbar select the icon. The cells are now merged.

### Merging or Splitting Adjacent Cells

1. Click into the cell in your chosen column or row and from the contextual toolbar select the small arrow of the icon.

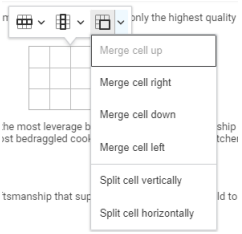


*Figure 4.53. Merge Cells menu*

2. From the menu, select the operation you want to perform.

# 4.6.3.7 Inserting and Editing Images

When *CoreMedia Studio* is accordingly configured, you can drag and drop images from the library or other locations into a rich text field and edit the images. In the *CoreMedia Blueprint* configuration of *CoreMedia Studio* for example, you can drag images that you have found with the *Images* search into the *Article Text* field of an *Article* content item.

## Inserting an image

1. Simply drag the image (for example, from the Library) with pressed left mouse button to the position in the rich text field where you want to insert the image.
2. Release the mouse button.

The image appears in the text field.

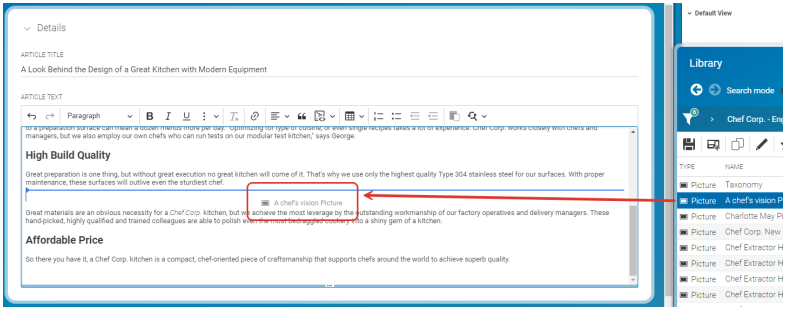


*Figure 4.54. Drag image into a rich text field*

## Deleting image

1. Click the image to select it.
2. Press **Del** on your keyboard.

The image has been deleted from the rich text field.

## Editing image

When you select an image, the contextual toolbar opens up from which you can edit the behaviour of your image.

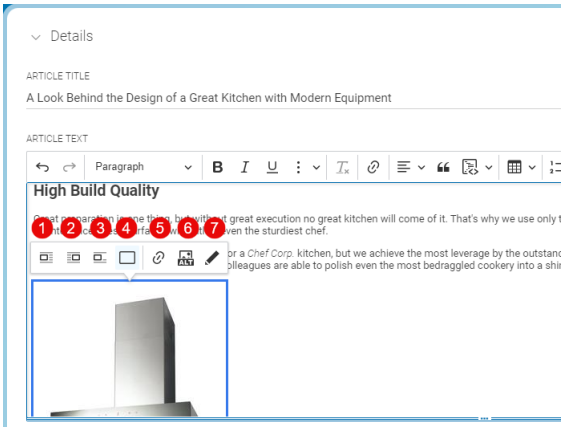


*Figure 4.55. Editing an image*

| Icon | Name |
|---|---|
| | Left-aligned |
| | Right-aligned |
| | Within text |
| | Page default |
| | Link image |

| Icon | Name |
| --- | --- |
| | Change image text alternative |
| | Open in tab |

*Table 4.16. Image icons*

### Positioning the Image

You can edit the position of the image in a rich text field. Select the image, so that the contextual toolbar opens. Select one of the options (1)-(4) to position your image.

### Linking the Image

You can add a link target to an image which will be called when you click the image. Select the image and click the icon (5). You can now add a link as described in Section 4.6.3.5, “Working With Links” [183].

When you want to edit the link, you have to select the image and click again the icon (5). Then the contextual toolbar of the link opens up.

### Adding Alt Text to Image

By default, images have the image title as alternative text. You can overwrite this by clicking the icon (6). Simply add the text in the opening dialog and click the save icon.

## 4.6.3.8 Finding and Replacing Text in Rich Text

You can find and replace text in rich text fields.

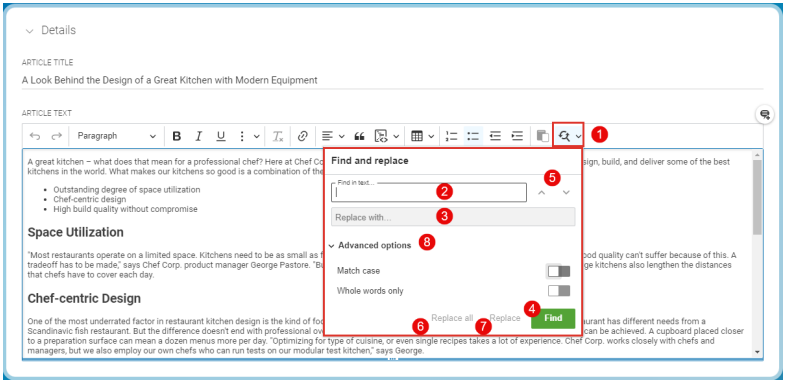


*Figure 4.56. Find text in rich text*

1. Click the icon (1) to open the *Find and replace* windows.
2. Enter the search term into the *Find in text...* field (2).
3. When you want to make a case-sensitive search or only want to search for whole words click the *Advanced options* icon (8) and activate the appropriate option.
4. Start the search by clicking the **[Find]** button (4) or press Enter.
5. The *Find in text...* field, shows the number of results and the first search result is selected in the text. You can use the navigation arrows (5) to jump from one search result to the next/previous.

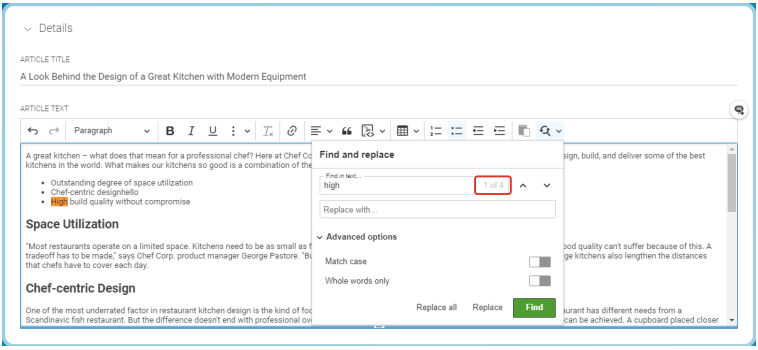


*Figure 4.57. Find text in rich text*

6. When you want to replace the search term with other text, enter the replacement text into the *Replace with...* field (3).

7. Click **[Replace all]** to replace all occurrences of the search term in the field or click **[Replace]** to replace the currently select search result.

## 4.6.3.9 Keyboard Navigation

While navigating through formatted text in *Studio* works fine with your mouse, you can also mark text, open popup menus or select buttons in toolbars using the keyboard only.

It differs slightly from the keyboard navigation in other parts of *Studio* though. This section will not cover every aspect on how to navigate to each action or button in the editor, but rather highlights where navigating the editor differs from the rest of the *Studio*.

NOTE

If a shortcut exists for a button in the editor's toolbar it will usually be shown in the tooltip of this button.

When navigating into the editor with the keyboard, you will notice that the editor's toolbar is skipped and the editing area is focused right away. You can jump into the toolbar whenever the editor is focused, by pressing <Alt>+<F10>. If a contextual balloon is visible, the navigation will jump into the balloon's toolbar instead. You can then switch the focus between different toolbars with the same shortcut.

Keyboard navigation in toolbars or on buttons works just like in the rest of *Studio*.

The following list contains shortcuts specific to work with content in *Studio*. Please have a look at the CKEditor 5 documentation for a list of more general CKEditor 5 keyboard shortcuts.

| Shortcut | Action |
|---|---|
| <Ctrl>+<Shift>+<O>. | Open selected Image in Tab |
| <Ctrl>+<Shift>+<P>. | Paste Link to Content in Clipboard |
| <Ctrl>+<Enter> | Open selected Content Link in Tab |

*Table 4.17. Formatted Text - Content related Keyboard Shortcuts*

# 4.6.4 Editing Struct Properties

A struct property is a specific content field, where you can manage structured data. It is mostly used for some settings of *CoreMedia Blueprint*.

You can use it, for example, to change the moderation type of a page (see Section 3.3.14, "Configuring *Elastic Social*" [96]).

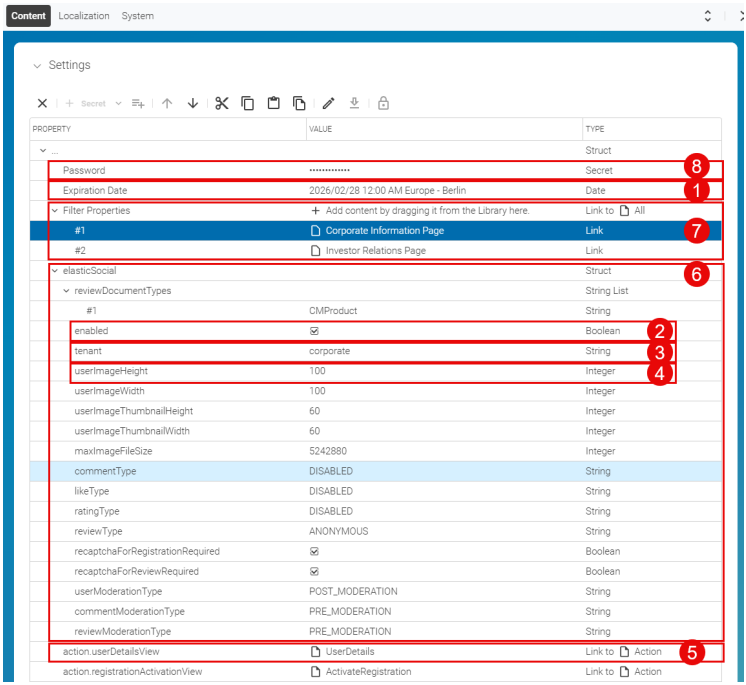


*Figure 4.58. Struct editor in a Settings content item*

You can enter numbers (`Integer` (4)), text (`String`, (3)), Boolean values displayed as check boxes (`Boolean` (2)), links to other CoreMedia content items (`Link` (5)), dates (`Date` (1)), passwords, API keys and other secret data (`Secret` (8)), structured data (`Struct` (6)), markup and binary content into a struct property.

NOTE

Creating `Secret` properties is only possible if an encryption service is present, which was configured via Spring. If the option is missing, contact your system administrator, who can find information on this topic in Chapter 4, *Encryption Service Setup* in *Deployment Manual*.

For all types, you can create two different items:

| | |
|---|---|
| **A single Property (1)** | A single property with name and value and, in addition, link type for a `Link`. |
| **A list Property (7)** | A container for several items of the specified type. It has only a name (and a link type for a `Link`) and you have to add a value property for content. |

| Icon | Name |
|---|---|
| | Remove item |
| | Cut item |
| | Copy |
| | Paste |
| | Duplicate |
| | Move up |
| | Move down |
| | Add item |
| | Add item List property |

| Icon | Name |
| --- | --- |
| | Open linked item in tab |
| | Encrypt string property value |

*Table 4.18. Struct editor icons*

## Editing Struct entries

You can change the name of an entry, the value and for a `Link` the link type. In addition, you can remove items from a list property or from a `Struct`.

### Changing the name

In order to change the name, double-click the *Name* field and enter the new name. If the new name already exists in the `Struct`, then it will not be changed.

### Changing the value

In order to edit a string or integer value, click the *Value* field and start typing. For a Boolean value toggle the status by clicking the checkbox.

*String, integer or Boolean value*

For a Link value, also click the *Value* field. The Library opens from where you can drag items onto the drop field. If the `Link` already contains a linked content, then it will be replaced by the new one. Use the *Remove item* icon to remove an entry from the `Link`.

*Link value*

For a Secret value, click the *Value* field. A dialog opens where you can enter the secret value to be encrypted. Even while entering, charactes are obscured to protect them from observers. Some browsers (e.g. Microsoft Edge) allow to toggle to plain text to check your input. After confirming the dialog, the secret value is encrypted, stored, and from then on displayed as several bullets (••••••••••••••). When hovering over the obscured value with the mouse, you can see that a Secret is actually binary data with a certain media type, so it can be downloaded like any other binary property.

*Secret value*

> **NOTE**
>
> When you click on a Secret's *Value* field, even if the Secret property already contains a value, the input field in the dialog starts empty, because once encryted, a Secret cannot be decrypted again in Studio. Thus, make sure that any newly generated password is memorized or copied to a safe place before encrypting it, since you will not be able to see it again in plain text, at least not in Studio.

### Converting a string to a Secret

*Encrypt string property value*

If a password or other secret data has already been added as a plain text string property, it can conveniently been encrypted as a Secret property by selecting it and clicking the *Encrypt string property value* button. The type of the property changes from `String` to `Secret` and the value is obscured. Encrypted strings are displayed as `******`. Once encrypted, the string values are not readable by humans anymore. Services in the background on the other hand, are able to decrypt and use the string values as before. This feature enhances the security of connection secrets, for example. It is appropriate for encrypting Content Hub or Feedback Hub connection configuration secrets.

> **NOTE**
>
> Converting a string to a Secret is only possible if an encryption service is present, which was configured via Spring. If the option is missing, contact your system administrator, who can find information on this topic in Chapter 4, *Encryption Service Setup* in *Deployment Manual*. Upon Spring configuration, the encrypt value button in the Struct editor toolbar will be enabled for string properties.

### Changing the link type

The link type of a `Link` or `LinkList` defines which content types you can drag into the property. When you create a new `Link`, you can enter all content items and folders into the property. In order to change the type, click on the dropdown list and select a content type.

If the `Link` already contains a link which does not fit to the new type, then the link will be removed.

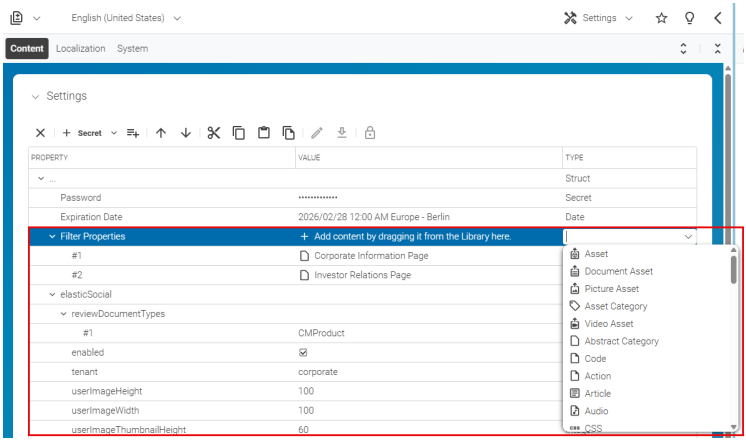


*Figure 4.59. Select content type for Link*

## Cut, Copy and Paste

In order to copy, cut and paste entries, select an entry and use the corresponding icons from the context menu or the toolbar.

When you paste entries, mind the following rules:

- When you have selected a Struct and copy an entry, it will be added as the first entry of the Struct. When you have selected an entry in a Struct, then the copied entry will be added behind the selected entry. The name of the copied entry is derived from the name of the copied entry and can be edited.
- You can not paste a copied single entry (for example a String) into the corresponding list (here, StringList). Instead, you have to create a new entry in the list and copy the value separately.

## Rearrange, duplicate or delete entries

In order to remove, rearrange or duplicate entries select the entry and use the icons of the toolbar or open the context menu with a right-click and select the required option.

With the *Remove item* icon you remove a property from the Struct editor or a link from a `Link`. With the *Move up* and *Move down* icon you can move items up and down. The *Duplicate* icon duplicates a complete property and adds it below the one that was duplicated. The **Duplicate** menu item is especially useful when you want to reuse a Struct property.

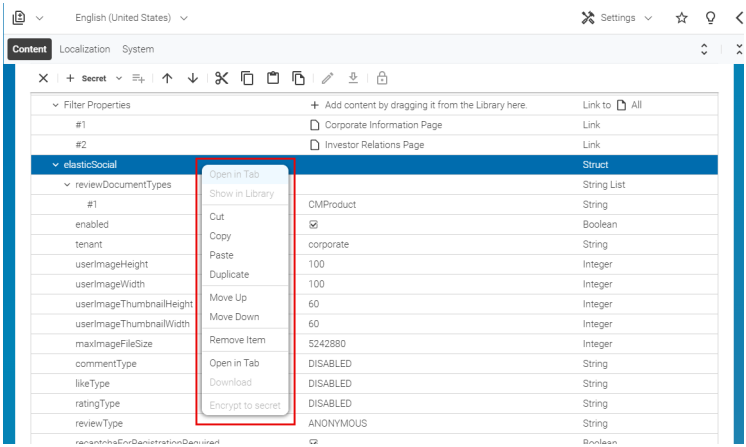


*Figure 4.60. Context menu for struct entry*

## Creating new entries

You can add new entries behind an existing entry or inside an existing `Struct`. Select the entry to which or after which you want to add a new property and select the required type from the split button (the split button always shows the type of the last created property). A new entry is created below the selected entry if it was not a `Struct` or otherwise inside the `Struct`.

Example: Select a `Struct` and choose **String** from the split button. This will create a `String` at the first position inside the `Struct`.

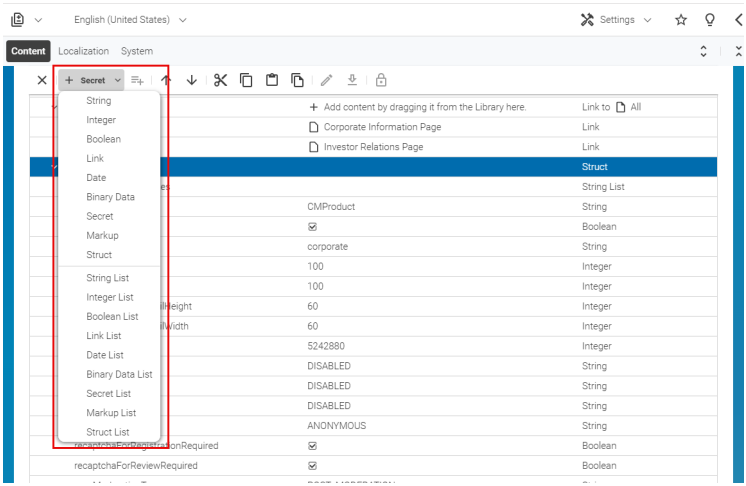


*Figure 4.61. A Split button with available options*

## Creating new list entries

The different list property types are equally handled except for link properties. In order to add entries to a `List` select the `List` and click the *Add item to List* icon. This will create an entry of the required type at the first position of the `List`. If you want to add entries behind a specific list element, select the element and click again the *Add item to List* icon. `List` items have no name but are numbered.

*Adding entries to a `LinkList`*

A newly created `LinkList` looks like a `Link` (except for the text in the drop area), but you can drag more than one content item to the drop area. So, in order to create entries in a `LinkList` drag one or more content items from the Library onto the drop field of the `LinkList`.

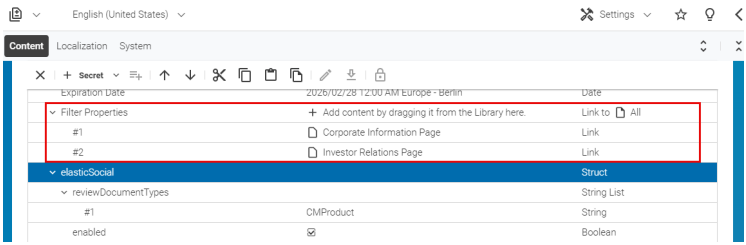


*Figure 4.62. LinkList with several entries*

### Copying complete Struct entry

If you want to copy the content of a Struct property (or any other property), select the Struct property and choose **Duplicate** from the context menu. This will add a copy below the selected Struct property.

## 4.6.5 Editing Link Lists

Link lists contain links to other content items within *CoreMedia CMS*. Link lists can be used to link layout information to a content item, to set up navigation structures or to specify the articles for a website, for example. In principle, a link list can contain an unlimited number of links: however, the configuration of your system may limit the maximum (or minimum) number available. Generally, only content items of a specific type can be inserted into link lists.

| Icon | Name |
|---|---|
| | Delete |
| | Open for editing |
| | Cut |
| | Copy |
| | Paste |
| | Create and add new content item |
| | Open the library to drag and drop content. |

*Table 4.19. Names of link list icons*

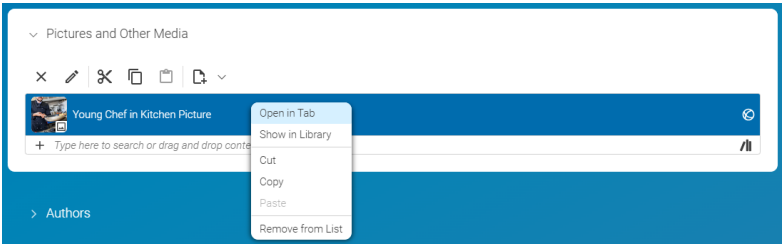


*Figure 4.63. Example of a link list*

## Inserting a link

There are different ways to insert a link into a link list.

### Search or select a suggested link

*CoreMedia Studio* can offer you suggestions for content you might want to add to a link links. Alternatively, you can directly start a search in the link list field.

The suggested content items are a best guess what might be interesting to insert next. It will initially show your recently edited content items and when switched to search mode it will first search for results close to your currently edited content, which is, for example, contents in the same site as your current content first.

1. Click into the text field below the link list, which is marked with the plus sign.

   Some recently edited content items are suggested for addition in a drop down box.

2. Select a content item from the drop down box to add it to the list. Optionally, enter a search term into the text field to switch to search mode and continue typing to narrow down the suggested content items.

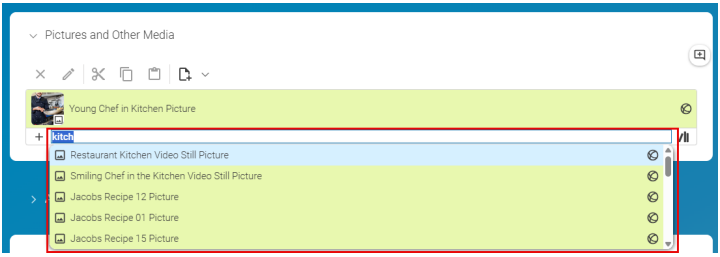


*Figure 4.64. Search for content in the link list*

The suggested content items are a best guess what might be interesting to insert next. Content items of the same site are shown first, if the link list is defined in a content item that is part of a site. Apart from that, recently edited content items appear first in the suggestions.

At any time you can click on the **[Open Library]** button to open the library instead to add the content via drag and drop. In case you entered a search term, it will be used as prefix-based search term in the opened library.

### Drag and Drop existing content

1. Click on the **[Open Library]** button on the right-hand side below the link list.

   The library opens up and all content items in the current site are shown that have the content types allowed for this link list.
2. Select the content item you wish to insert from the Library.
3. Now drag the content item to the link list.

### Copy and Paste links

1. Copy a link from the Library or another link list.
2. Click the **[Paste]** icon in the appropriate link list.

### Creating and adding a new content item

1. Click the **[Create and add new content item]** icon in the link list.

   A dialog opens up. If the link list can hold different content types, you have to select the required type from a list that appears before the dialog box.
2. Enter the name and folder of the new content item.
3. Click **[Confirm]**

The content item now appears in the link list. If you try to insert a content item of the wrong content type, a small "stop" sign is shown.

### Upload a file, create an item and link

If the link list links to content which contains binary files such as images, videos or PDF documents you can simply drag the file from the computer into the link list.

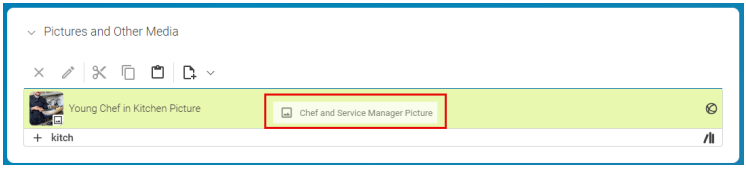


*Figure 4.65. Drag image into link list*

Studio creates the required content item (for example an item of type `Picture` for a PNG image), adds your file to the item and links it from the link list. See section "Drag and Drop into the Library or Link List" [152] for more details.

You can drag and drop more than one file simultaneously which can even have different types. However, when the list does not support the type of the created content item, you will get a warning and the operation fails.

## Copying a link

You can copy a link from a link list and paste it into other link lists or the library. You can either mark the link and click the **[Copy]** icon or simply drag the link to the new link list.

## Cutting a link

1. Select the link you want to cut from the link list.
2. Click the **[Cut]** icon.

The link has been removed from the link list and has been saved in the clipboard. You can copy the link into other link lists but not in the Library.

## Deleting a link

1. Select the link you wish to delete from the link list.
2. Click the *Delete* icon.

The link is now deleted from the link list.

## Changing the order of your links

Depending on the way the list is used, the order of its links may make a difference. To reposition your links in the link list, simply drag and drop them using the mouse.

## Opening a linked content item

1. Simply double-click the content item.

or

1. Mark your chosen content item in the link list.

2. Select **Open in tab** from the context menu or click the *Open in tab* icon.

## Annotated Link List

Annotated link lists work like normal link lists, but you can add information to the linked content. An example is the advanced teaser management, where you can add call-to-action buttons to the teaser targets (see Section 4.6.9, "Advanced Teaser Management" [224]). The row expander of a link list item shows, if the default state of the additional information was changed. In Figure 4.66, " Annotated link list with changed default state of link list item " [205] the *Show Call-to-Action Button* checkbox has been checked and therefore, the expander has changed the appearance.

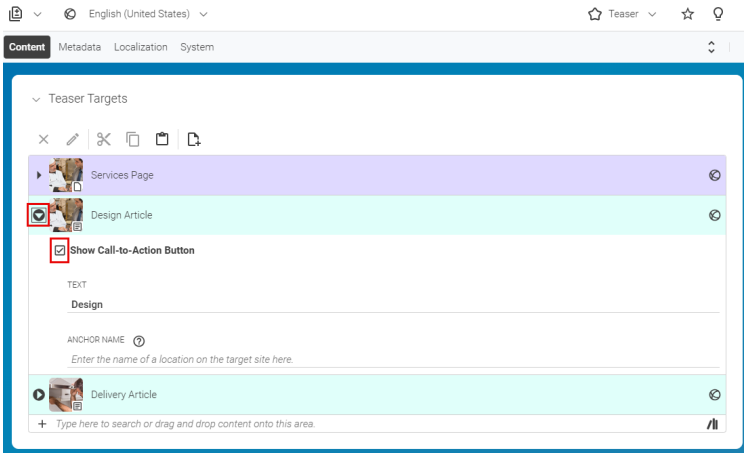


*Figure 4.66. Annotated link list with changed default state of link list item*

Another example is the *Visible From* label in link lists in placements, for example, in pages. Here, you can select, when a content should appear in the placement (see Section 4.6.14, "Time Dependent Visibility" [235] for more details)

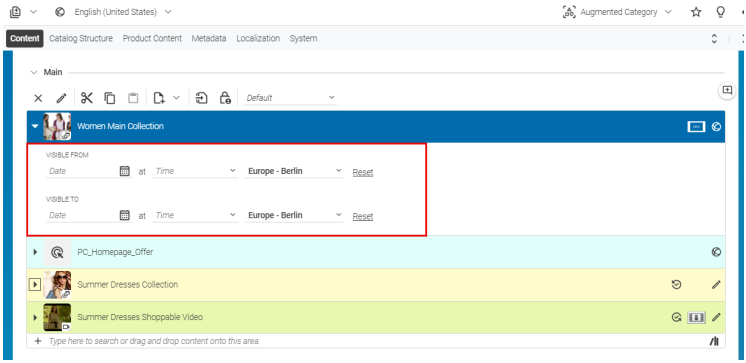


*Figure 4.67. Visible from annotation in placements*

# 4.6.6 Managing Files

*CoreMedia CMS* can be used to manage any kinds of files. Accordingly, you can in principle insert a wide range of media items into your content item – such as image files, audio recordings or Word files. Your content types define the exact kinds of media items that you can manage and the kinds of CoreMedia content items you can insert these into.

Certain formats are particularly well supported for the user: for image files, for example, a preview image is displayed. As a minimum, the type and size of the file is shown for all files.

You can either create an appropriate content item and import an external file later, as described below, or use the **Create** menu to create a content item from an external file as described in Section 4.4.1.6, “Uploading Files” [151].

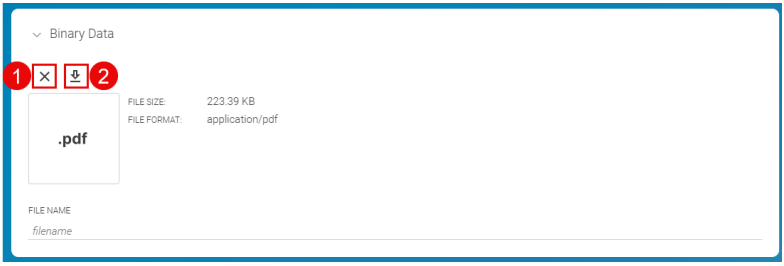


*Figure 4.68. A field for external files*

### Importing external files

1. Click the **[Import image...]** button (2) for the corresponding field.

   A file selection box opens.

2. Select your chosen file and then click **[Open]**.

or

1. Drag and drop the file on the corresponding field.

The file is imported (during the import process, a progress bar shows you the progress of the file import).

### Deleting external files

1. To delete an imported file from your content item, click the *Delete* icon (1) in the toolbar above the file.

The file is now removed from the content item.

# 4.6.7 Editing Images

*CoreMedia Studio* enables you to edit an uploaded image; even animated GIFs are supported.

You can, for example, flip, rotate, crop an image or change brightness and contrast. This functionality is non-destructive and can be reverted. You can use most of these functions like in your standard image processing software. Nevertheless, the cropping feature differs from the usual implementation that you know from other image processing tools.

### NOTE

When you know that you will only need the original image, for technical usage, for example, then you can select the *Use Original Image* checkbox below the image. In this case, the uploaded image without any crops or edits will be used.

The CoreMedia system automatically scales down very large images during upload. So, when you upload an 5000*5000 pixel image you might see, for example, an original size of only 4000*4000 pixel in the image editor. The *Use Original Image* checkbox does not affect this scaling. The auto-scaling is only applied in Self-Managed and early Cloud Installations.

Image orientation in image file's metadata (EXIF) is not evaluated by the CoreMedia system. So, if an uploaded image appears mirrored or oriented unexpectedly, you may apply a correcting rotation and/or flipping in Studio's image editor or rotate / flip the image to the desired orientation (without EXIF metadata) using an external tool prior to uploading in Studio. Using an external tool is the recommended way.

### Features of Cloud Installations

The editing capabilities of Self-Managed and new Cloud Installations since CMCC 11 (2307) differ in terms of supported image formats, image sizes, and image editing capabilities. The features of image editing in a Cloud installation are described here. For example, if you see a broken image in your preview, it is most likely due to an image exceeding the supported image dimensions.

The main idea in *CoreMedia Studio* is, that you need images for your website which have a fixed aspect ratio that fits perfectly into the page grid. Therefore, your CoreMedia system has been prepared so that you can choose different crops with a fixed aspect ratio and a minimal size for a given image. An example of possible crops are shown in the image (see Figure 4.69, “Cropping images” [209]) with selection frames. You can use the tabs in the form to select a specific crop. In the preview, you will see all crops in comparison.

So, for example, the 4:3 crop could be shown in an article on your website while the 1:1 crop is shown in a teaser. Where a crop is actually shown, depends on your specific CoreMedia system configuration.

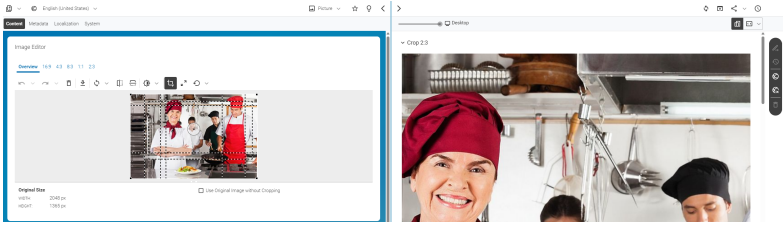

*Figure 4.69. Cropping images*

# 4.6.7.1 The Selection Frame

*CoreMedia Studio* uses a specific concept to couple the selection frames of the crops in an image. When you have uploaded an image or opened an image content item, you will see all dashed selection frames in the overview.

*Common selection area*

By default, the complete image is selected and all frames have a common center in the middle of the image. The common selection area is highlighted by the solid white frame around the image. If you move or resize the common selection area, then all selection frames are moved and resized accordingly. If the common area is smaller than the image, then the image outside the selection area appears darker.

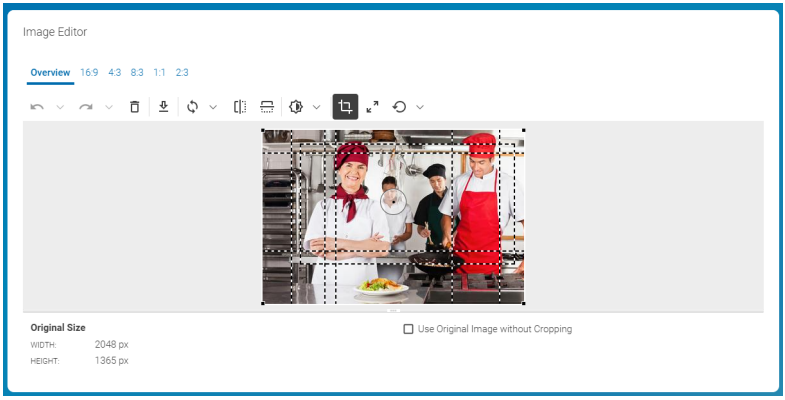


*Figure 4.70. Overview with all selection frames*

*Arrange the focus point*

By default, all selection frames are centered around the center of the image. However, the center is not always the main point of interest in an image. So, for example, when you have a landscape image, with the main subject in the left side and you have a 1:1 crop, then the main subject might be missing in the crop.

Therefore, you can move the focus point to another location. All selection frames in the common selection area of the image are rearranged in such a way, that the new focus point is as well as possible at the center of the selection frame.

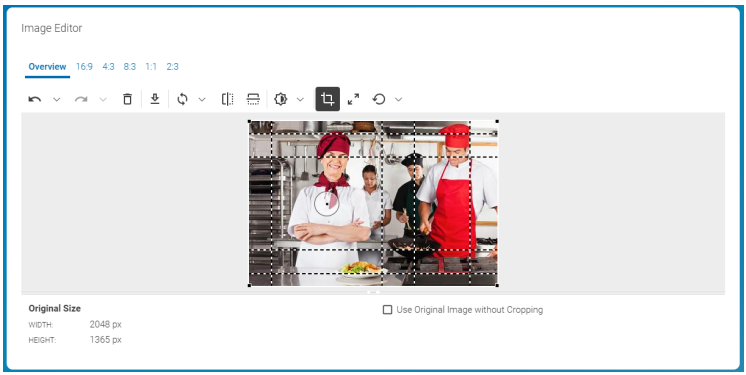


*Figure 4.71. Moved focus point with automatically arranged 1:1 crop*

*Decoupling frames*

If the common selection is not suited for a crop, you can decouple the crop from the common selection and edit it separately. You can check if a crop is decoupled by the position of the selection frame in the overview or in the separate view of a crop. A decoupled frame is not rearranged when you move the focus point

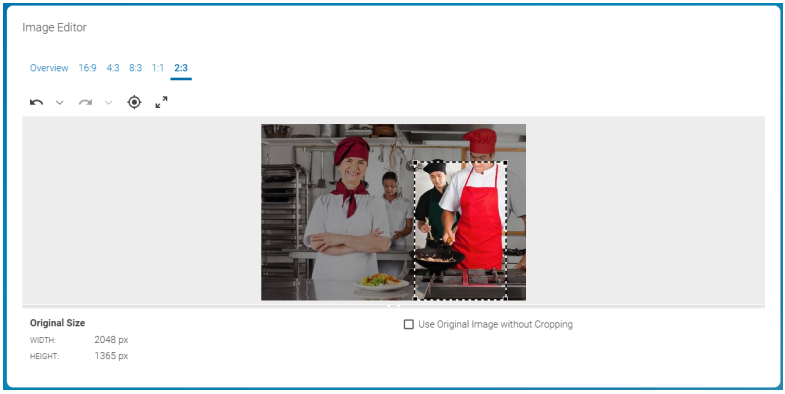


*Figure 4.72. Decoupled selection frame*

*Width warning*

If a crop falls below the minimal width, its selection frame and label will be shown in orange and a warning message will be displayed in the list of content warnings and errors (see Section 2.8, “Validators” [56]). You can still publish the content item, but you have to expect suboptimal image quality.

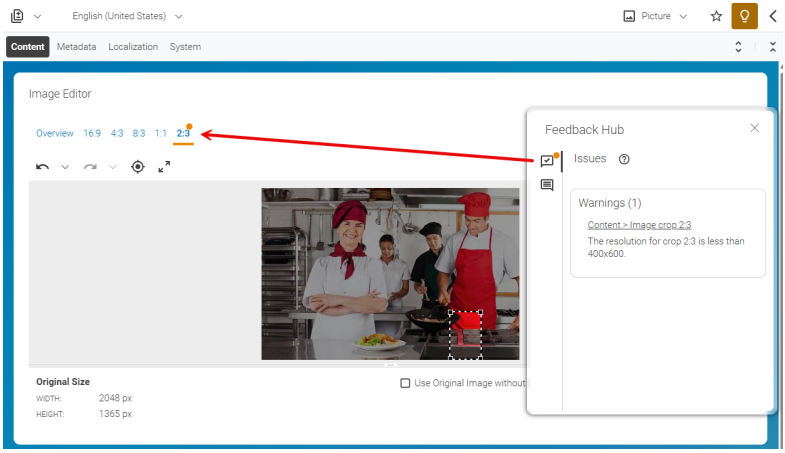


*Figure 4.73. The crop is too small*

# 4.6.7.2 Cropping Images

*CoreMedia Studio* comes with different crops for an image. The size, aspect ratio and number of these crops has been defined by your project team while your CoreMedia system was implemented (see Section 4.6.7, “Editing Images” [207]). Of course, these default setting can be changed, you should ask the person in charge for the CoreMedia system for support.

You can change the position and size - but not the ratio - of the crops.

| Icon | Name | Description |
|---|---|---|
| | Reset all focal points and crops | The effect of this button depends on the current selection:<br>**All selection frames**<br>All selection frames have a common center, are coupled and the size has been maximized.<br>**One selection frames**<br>The center of a single selection frame will be moved to the common center. The size of the selection frame will be maximized within the limits of the common cropping area. The selection frame will be coupled with the common selection. |
| | Hide crops | All selection frames will be shown or hidden. The common cropping area will still be shown. |

| Icon | Name | Description |
|---|---|---|
| | Enlarge | If the current crop has a different aspect ratio than the original image (which is the common case), it is inevitable that some parts of the image are cut off, no matter how you position the crop frame. By pressing this button, the image is enlarged in such a way that the current crop fits exactly and no image information is lost. If this button is pressed in the overview, the images of all crops are enlarged. |

*Table 4.20. Buttons for cropping images*

When images are enlarged, the missing parts are filled with white color by default. This should be sufficient in most cases. However, you can define your own color.

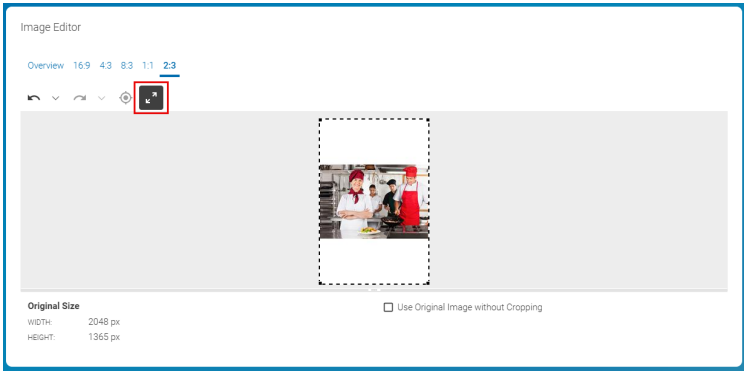


*Figure 4.74. Enlarged image with white background*

## Defining the background color

In order to change the background color used for the empty space of an image fitted to a crop, proceed as follows:

1. Open the *System* tab of the image and there the *Local Settings* field.
2. Add a String property named *background* to the Struct property *coloring*. If the property *coloring* does not exist, create it.
3. Add the background color as four hexadecimal byte values, for example FF00FF00, to the *background* property. The first byte denotes the transparency (alpha channel) while the remaining three specify the red, green and blue color values, respectively

NOTE

A transparency value of `FF` is opaque, while `00` is totally transparent. Please note that any transparency value different from `FF` will cause the resulting image format to be changed to PNG. This might be undesirable if the original image is a highly compressed JPEG.

## Defining the common focus point

By default, all crops are centered around the center of the common selection area. However, you can move the focus point and Studio tries to center all selection frames around the focus point. The size of the selection frames does not change. Therefore, the selection frames will mostly not exactly center around the new focus point.

When you move or resize the common selection frame, then the focus point stays at its position until the common selection frame touches the focus point. When you proceed, the focus point follows the movement of the common selection frame.

In order to change the focus point simply move the focus icon to the new position as shown in Figure 4.75, " Move focus point " [?].

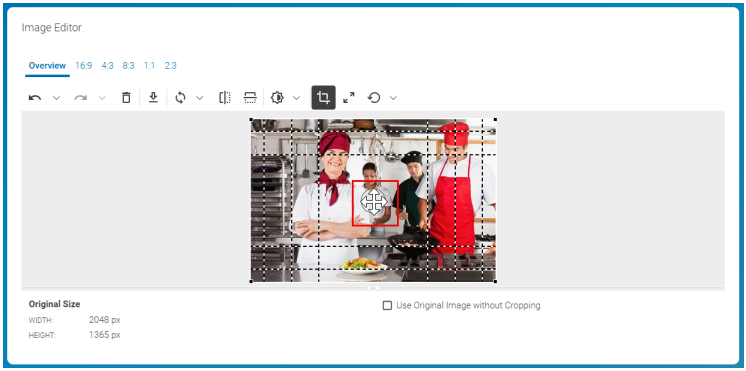


*Figure 4.75. Move focus point*

## Defining the position of a crop

It makes no difference if you want to define a single crop or all crops at once. Therefore, there will be no separate description below. You can immediately see all changes in the preview.

1. Click the highlighted selection area and keep the button pressed.
2. Move the selection area to the required position.

## Defining the size of a crop

1. Click one of the black handles and keep the button pressed.
2. Drag the mouse in the convenient direction to change the size.

While you change the size, the aspect ratio will be preserved. Once you fall below the minimum size, the frame turns red.

## Selecting a frame

If you want to edit a frame separately, you have to select it. To do so, you have three alternatives:

1. Click the frame.

or

1. Select the respective tab.

or

1. Choose the respective frame in the preview.
2. Right click on that image in the preview.

The selection frame is now shown without the other frames. Only the square icon indicates the center of the common cropping area.

## Decoupling frames

1. Select the frame.
2. Change the position of the center or resize the frame.

### Coupling frames

You can either couple all frames again or couple a single frame to the common selection.

#### Coupling all frames

In order to couple all frames and to restore the maximum size of the common cropping area, proceed as follows:

1. Select the *Overview* tab.
2. Click the *Reset All Focal Points and Crops* button in the *Reset to Initial State* menu.

#### Coupling one frame

In order to couple one specific frame with the common selection and to adapt its size to the size of the common selection, proceed as follows:

1. Select the frame.
2. Click the **[Reset focal point]** button.

### Hiding selection frames

In order to improve the overview, for example, you can hide all selection frames in the *Overview* tab.

1. Click the *Hide Crops* button.

Only the common cropping area is shown.

## 4.6.7.3 Flipping and Rotating Images

You can flip and rotate images that you have uploaded into *CoreMedia Studio*. To do so, you can use the following icons:

| Icon | Name |
|---|---|
| | Flip the image along the horizontal axis |
| | Flip the image along the vertical axis |
| | Rotate menu |

| Icon | Name |
| --- | --- |
| | Rotate 90 degrees left |
| | Rotate 90 degrees right |

*Table 4.21. Icons for flipping and rotating*

## Flipping images

You can simply flip images at the horizontal or vertical axis with *CoreMedia Studio*. Keep in mind that always the whole picture is flipped. So, you cannot flip different crops of an image separately. The selection frames are also flipped, so that afterwards the same content is selected.

### Flip horizontally

Click the *Flip horizontally* icon.

### Flip vertically

Click the *Flip vertically* icon.

## Rotating images

You can either rotate images in *CoreMedia Studio* in 90° steps to the left and to the right or continuously align the position. Keep in mind that always the whole picture is rotated. So, you cannot rotate different crops of an image separately. However, *CoreMedia Studio* tries to keep the relative position of a selection frame with respect to the image. This can lead to an adapted size of the selection frames.

### Aligning images

In order to align a tilted horizon, for example, you can infinitely align an image in a given range. When you align the image, there would inevitably be corners with no content, therefore the image is zoomed in to avoid this. This adjustment keeps the aspect ratio of the selection frames, therefore the frames are not changed.

Select the *Rotate* menu and use the *Straighten* slider to align the image.

### Rotating images with 90° steps

Select the *Rotate* menu and click the *Rotate left* icon for a rotation to the left and the *Rotate right* icon for a rotation to the right. Click the *Reset* link to recreate the original position. Keep in mind, that the reset will not reset the original size and position of the selection frames.

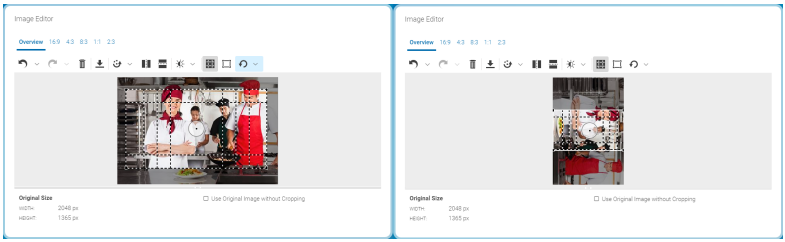


*Figure 4.76. Effect of rotation on the selection frames*

Revert changes

If you want to recover the original orientation of the image, simply click the **[Reset]** button.

## 4.6.7.4 Changing Exposure

*CoreMedia Studio* lets you adjust the exposure of an image to improve the quality.

| Icon | Name |
|---|---|
| | Change exposure |

*Table 4.22. Icon for exposure changes*

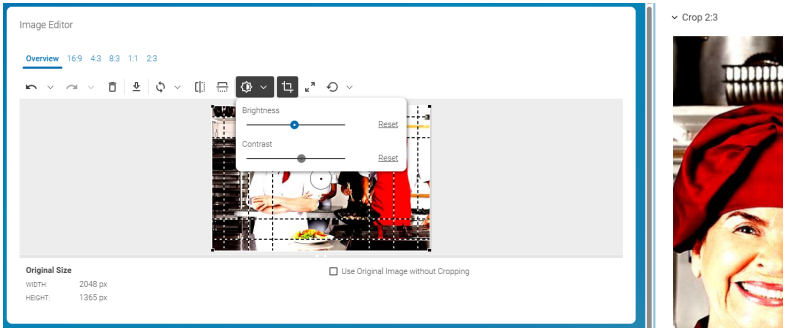


*Figure 4.77. Exposure controls*

### Adjusting Brightness

1. Click the *Change Exposure* icon.
2. Adjust the brightness with the *Brightness* slider to your needs.

Upon letting go of the slider, you will see the changed brightness immediately in the form and with a slight delay in the Preview. Using the **[Reset]** button, you can restore the initial brightness of your image.

### Adjusting Contrast

1. Click the *Change Exposure* icon.
2. Adjust the contrast with the *Contrast* slider to your needs.

Upon letting go of the slider, you will see the changed contrast immediately in the form and with a slight delay in the Preview. Using the **[Reset]** button, you can restore the initial contrast of your image.

## 4.6.7.5 Reverting Changes

In *CoreMedia Studio*, you can undo a specific number of processing steps or redo steps you have previously undone. You can also undo all steps at once.

| Icon | Name |
|---|---|
| | Undo |
| | Redo |

*Table 4.23. Icons for undo and redo*

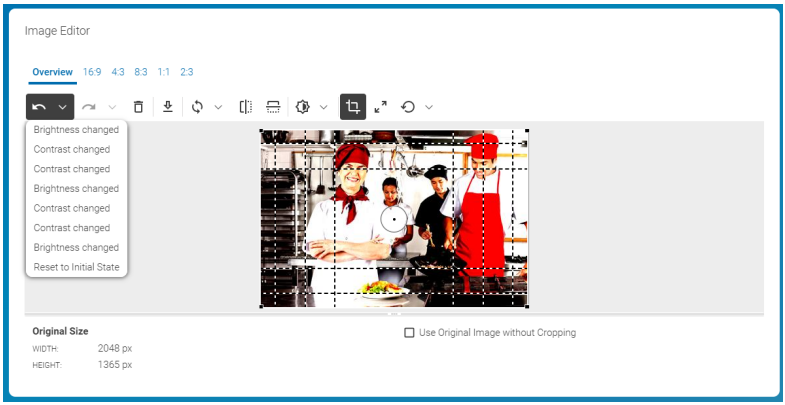


*Figure 4.78. Undo steps*

## Undoing changes

1. In order to undo the last change, click the *Undo* icon.

The last change will be undone.

1. In order to undo multiple change steps, click the arrow next to the *Undo* icon.

A dropdown menu opens up. The menu shows the changes you have done. Here you can undo a series of changes:

1. Click one change in the list to undo this change and all changes before.

## Redoing changes you have undone

In order to redo an undone change, click the *Redo* icon.

1. In order to redo multiple change steps, click the arrow next to the *Redo* icon.

   A dropdown menu opens up. The menu shows the changes you have undone. Here you can redo a series of changes:
2. Click one change in the list to redo this change and all changes before.

## Reset all changes

Using the undo functionality you can only revert the changes made since the last time the content item was checked in or reverted. In order to revert the

image to its original state, including removing all transformations and resetting the crops to their default states, proceed as follows.

| Icon | Name |
| --- | --- |
| | Reset to Initial State |

*Table 4.24. Icon for resetting to initial state*

1. Click the *Reset to Initial State* icon and select *Reset to Initial State* from the menu.

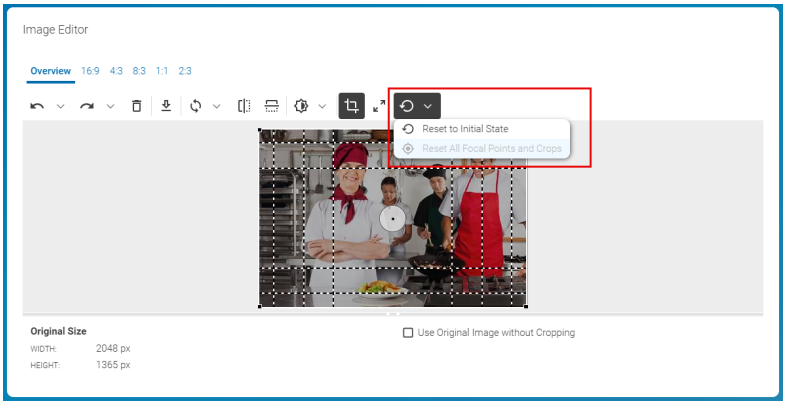


*Figure 4.79. Reset to initial state*

All changes that have been applied to the image in *CoreMedia Studio* are reverted. You may undo this by using the undo button.

# 4.6.8 Editing Image Maps

CoreMedia Blueprint feature

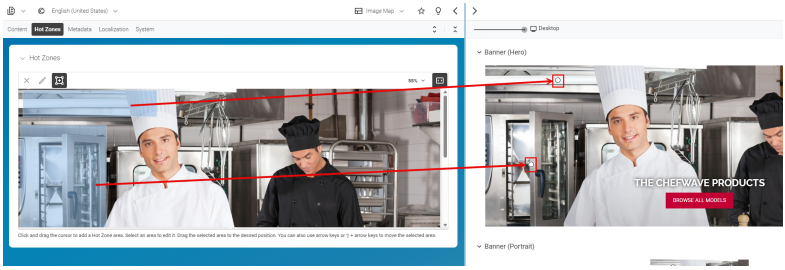


*Figure 4.80. Hot Zones in an image map (pop-up)*

*CoreMedia Studio* enables you to create and edit interactive image maps. Interactive image maps are made up of hot zones (image map areas) that are drawn on a picture and link to some target content. Depending on the hot zone configuration, the linked content is displayed in a pop-up close to the hot zone whenever a website visitor clicks on the hot zone or it is displayed as inline overlay which is always visible but only shows title and price information. You can configure several content properties, for example title or price that are shown in the overlay.

Figure 4.81, "Hot Zones in an image map (inline)" [221] shows an image map with two hot zones configured as inline overlay. For hot zones displayed as inline overlay, a theme can be configured per hot zone.

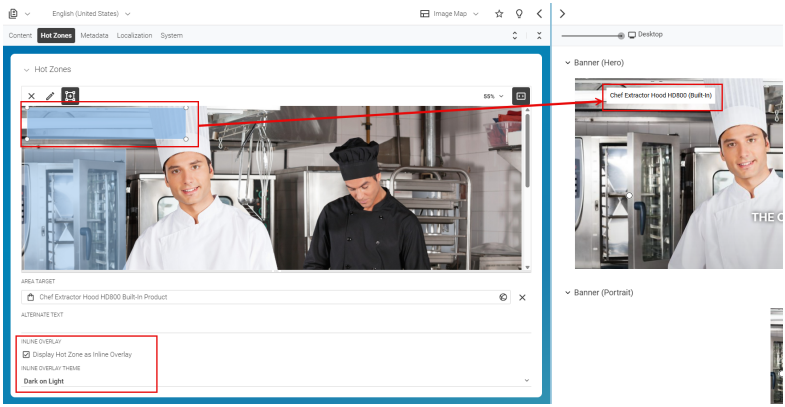


*Figure 4.81. Hot Zones in an image map (inline)*

In addition to the common properties inherited from `CMTeasable` you can configure how the hot zones' overlays are displayed.

Figure 4.82, “Configuring image maps” [222] shows the configuration options for image maps.

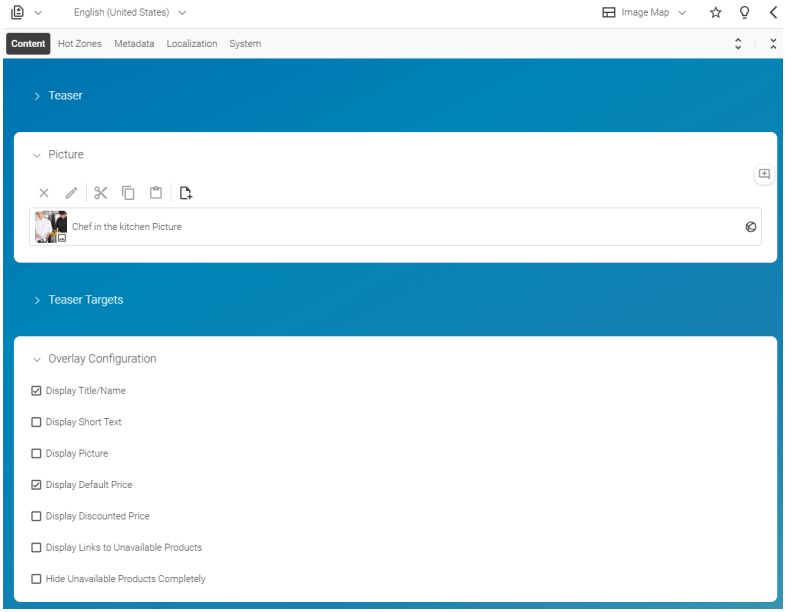


*Figure 4.82. Configuring image maps*

The hot zone overlay configuration is defined per image map and applies to all hot zones. For *Inline Overlays* the overlay configuration options *Display Short Text* and *Display Picture* are ignored.

## Creating an Image Map

In order to create a new image map proceed as follows:

1. Create a new content item of type `Image Map`.
2. Drag the image which you want to enhance with hot zones on the *Picture* field in the *Content* tab.
3. Add a title and text to the *Teaser Title* and *Teaser Text* fields of the same tab. This text is shown when you use the image map in a teaser position.
4. You can add teaser targets to the image map. See Section 4.6.9, “Advanced Teaser Management” [224] for details.

5. Define the information that should be shown in the pop-up by selecting the appropriate options in the *Overlay Configuration* field as shown in .
6. Now, you can start defining the hot zones as described in the next subsection.

## Defining Hot Zones

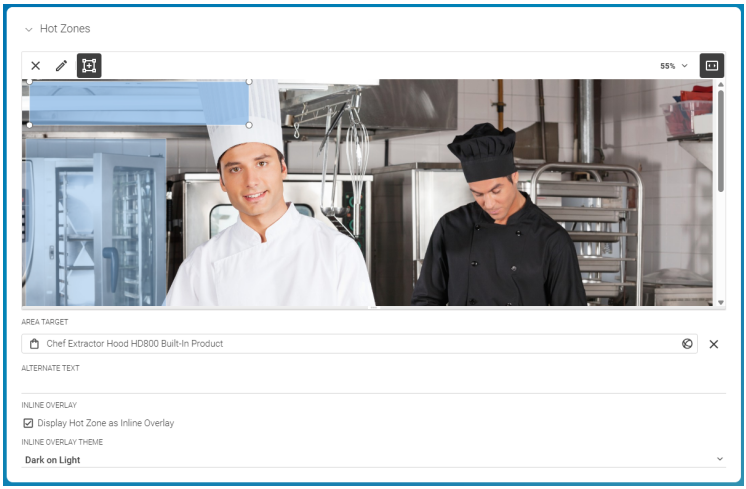


*Figure 4.83. Creating hot zones with an inline overlay zone selected for editing*

1. Click with the mouse at the position where you want to add a hot zone, keep the button clicked and move the cursor in order to open the hot zone rectangle.

   The rectangle appears in red, because you haven't added a target content yet. You can resize the hot zone by dragging one of the four handles of the hot zone. In order to move a hot zone, click inside the rectangle, keep the button pressed and move the mouse.
2. Drag a content item onto the hot zone or on the *Area Target* field to add the target content.

   The rectangle is now colored in blue and the position of the hot zone is shown in the preview with a plus sign or as an inline overlay. The linked content item is displayed as a pop-up when you click on the hot zone in the content's preview panel. Note that hot zones that are not yet linked to a content item are not visible in the content's preview.
3. Configure the hot zone as *Inline Overlay* if it should be displayed inline. For inline overlays you can select an *Inline Overlay Theme* per hot zone to define the style.

4. Add more hot zones to the image.

Removing Hot Zones

Select the hot zone that you want to remove and click the *Remove selected area* icon in the toolbar of the hot zone editor.

Opening Linked Content

Select the hot zone for which you want to open the linked target content and click the *Open linked content in tab* icon in the toolbar of the hot zone editor or double-click the content item in the *Area Target* field.

CAUTION

In the *CAE* hot zones do not make sense for all view variants. If it is used as `teaser` - as it is the default for main and sidebar placements, for example - no hot zones will be rendered.



# 4.6.9 Advanced Teaser Management

CoreMedia Blueprint feature

With Advanced Teaser Management *CoreMedia Content Cloud* allows you to manage text and call-to-action buttons on a teaser image.

## 4.6.9.1 Positioning Text on Teasers

For specific views of certain content types, such as the "Hero Teaser" view of an article or teaser, you can freely position and style an overlay containing the teaser text. If you have added a call-to-action button (see Section 4.6.9.3, “Setting a Call-to-action Button” [229] for details), this button will be positioned inside the overlay together with the text.

1. In the *Content* tab of the content item open the *Teaser* panel.

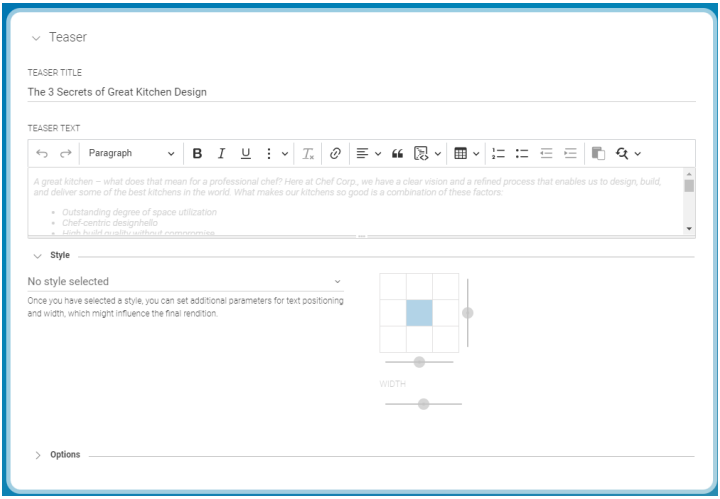


*Figure 4.84. Open Teaser panel*

Only the content of the *Teaser Text* field is used for the movable text. The content of the *Teaser Title* field is omitted.

2. Expand the *Style* section of the *Teaser* panel to select a global style for the text. The style defines the appearance of the overlay and its inner elements such as the font color and background.

   Your available styles may differ from the styles in the image below.

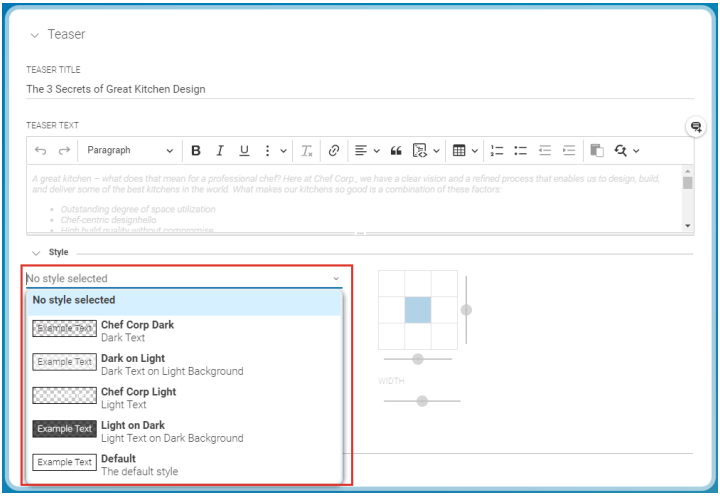


*Figure 4.85. Select style for movable teaser text*

3. Enter your text in the text field (1) and use the buttons in the toolbar (2) to format your text. You can choose a style, format the text as bold or italic and select the text alignment per paragraph. See Section 4.6.3, "Rich Text Editing" [175] for details about text formatting.

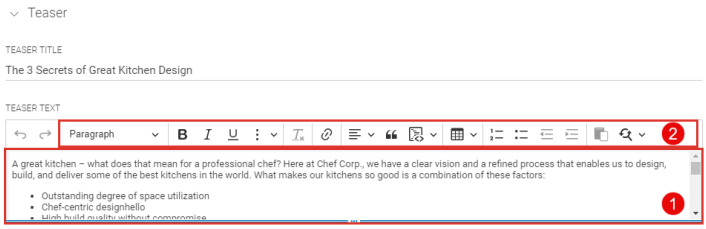


*Figure 4.86. Formatting text*

4. Expand the *Style* section of the *Teaser* panel to see the position menu. First, you have to select a style to activate the position menu. You can either click on of the squares in field (1) to position the overlay at the corresponding location in the image or use the sliders (2+3) to position the text more precisely.

   With the *Width* slider (4), adapt the width of the overlay.

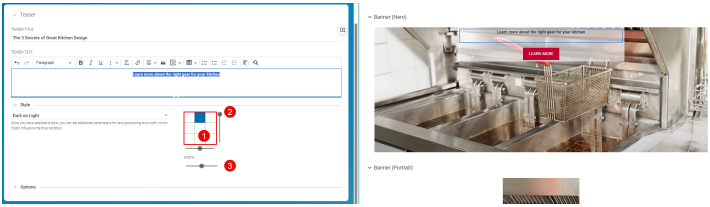

*Figure 4.87. Position text*

5. When you want to link from the teaser to the detail page of the content, select the *Render Link To Detail Page* checkbox (3).

## 4.6.9.2 Creating Styles for Teaser Overlays

The list of teaser overlay styles shown in the *Style* dropdown box is aggregated from styles found in `/Settings/Options/Settings/Teaser Styles` and `<SiteName>/Options/Settings/Teaser Styles`. A teaser overlay style is configured in a `CMSetting` content.

In order to define your own style, proceed as follows:

1. Global style: Create a content item of type `CMSetting` in `/Settings/Options/Settings/Teaser Styles`.

   Site specific style: Create a content item of type `CMSetting` in `<SiteName>/Options/Settings/Teaser Styles`.
2. Define the appearance of the style in the dropdown box with the following properties:

| Property | Type | Description |
|---|---|---|
| `title` | `String` | The title to show in the "Style" combo box on the teaser form. |
| `description` | `String` | The description to show in the "Style" combo box on the teaser form. |
| `style` | `Struct` | Contains the technical styles. |

*Table 4.25. Configurable properties for a teaser overlay style*

3. Define the appearance of the overlay on the teaser with the following properties:

| Sub-Property | Type | Description |
|---|---|---|
| `color` | `String` | Contains the value of a CSS color property to be used as the color of the overlay. |
| `backgroundColor` | `String` | Contains the value of a CSS color property to be used as the background color of the overlay. |
| `additionalStyles` | `String` | Contains plain CSS styles to be attached to the *`style`* property of the overlay. |
| `cls` | `String` | Contains one or more CSS class names to be attached to the overlay. |
| `textCls` | `String` | Contains one or more CSS class names to be attached to the text element of the overlay containing the contents of the *Teaser Text* field. Predefined CSS classes are "cm-richtext--dark-shadow" and "cm-richtext--light-shadow" which can be used to improve legibility for the overlays on some backgrounds by adding a dark or light text shadow. |
| `ctaCls` | `String` | Contains one or more CSS class names to be attached to the call-to-action button element. Only applies if you have added a call-to-action button (see Section 4.6.9.3, “Setting a Call-to-action Button” [229] for details). |

*Table 4.26. Configurable properties for the 'style' sub struct*

Figure 4.88, “ Example style definition ” [229] shows the configuration of the default style.

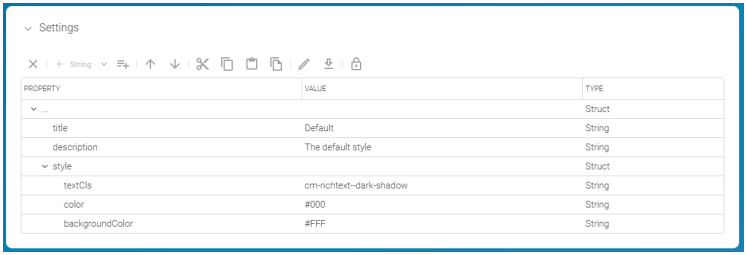


*Figure 4.88. Example style definition*

## 4.6.9.3 Setting a Call-to-action Button

For a teasable content, you might define one or more (only for `Teaser` content) call-to-action buttons. That is a button shown in the teaser view of the content. By default, you will see a **[Learn More]** button. When a user clicks the button, then the whole content will be shown. The location of the call-to-action checkbox is different for teasable content (such as Article) and for Teaser items and inheriting items (such as Image Map).

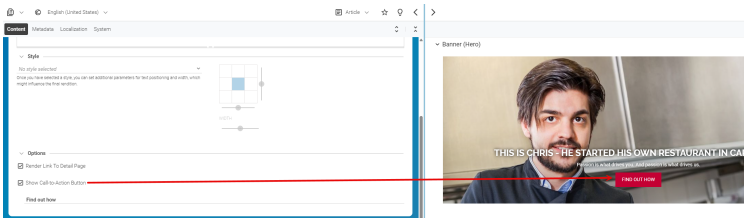


*Figure 4.89. Call-to-action button in teaser view*

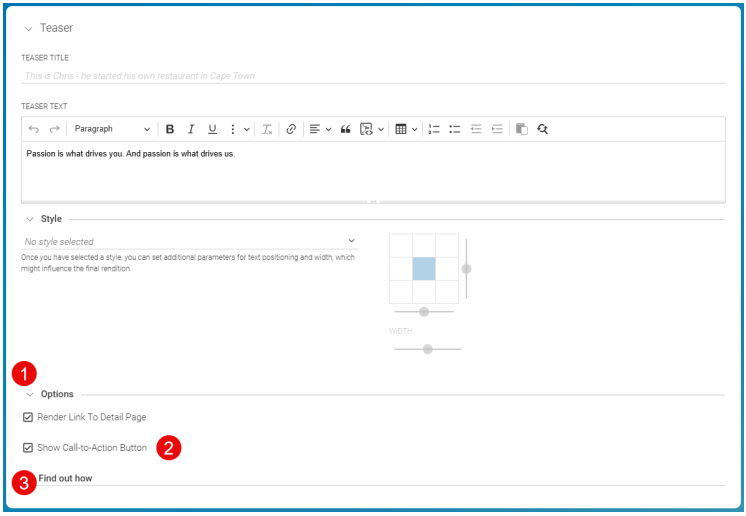


*Figure 4.90. Call-to-action checkbox in teasable content item*

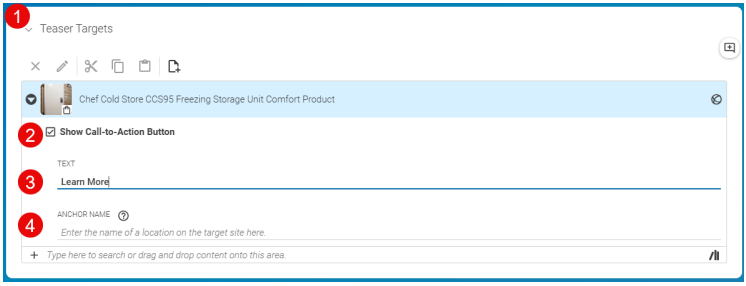


*Figure 4.91. Call-to-action checkbox in Teaser content item*

1. Open the *Content* tab of the content.
2. In the *Teaser* panel (for teasable content) open the *Options* field (1). For a Teaser content item open the *Teaser Targets* panel (1).
3. In the *Teaser Options* field (for teasable content) or *Teaser Targets* field, check the *Show Call-to-Action Button* checkbox (2).
4. If you want, enter a custom call-to-action text in the *Text* field (3). Otherwise, the default text will be shown.
5. For a Teaser content item, you can also add the name of an anchor of the target page, so that the call-to-action button leads to a specific section of

the target content. Enter the plain anchor name (without the leading hash character), in the *Anchor Name* field (4).

You have to ask your theme developer for the available anchors of the target content items.

# 4.6.10 Editing 360°-Views

CoreMedia Commerce feature

*CoreMedia Studio* enables you to create and edit 360°-Views. A 360°-Views is a sequence of pictures which shows a product from different perspectives. On the website the 360°-View enables a user to rotate through the pictures by using touch controls.

Create a `360°-View` content item by clicking the button in the library. Edit the properties of the item in the form. Note, that a valid 360°-View must have more than two pictures. Link the 360°-View to a product, so that it will be shown on a product detail page (see Section 6.2.3.5, "Adding Specific Content for Product Detail Pages (PDP)" [350]).

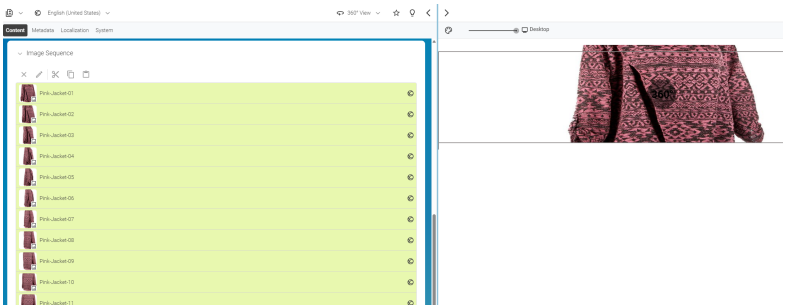

*Figure 4.92. Images of a dress with a slight counterclockwise rotation*

# 4.6.11 Editing Shoppable Videos

eCommerce Connector feature

*CoreMedia Studio* enables you to manage videos in the Video content item. As a special feature, you can add content items that are shown synchronized with

the video. For example, when the video shows a kitchen from second 40 to second 70, you can show cooking accessories beside the video in the same period while showing other products during the rest of the time.

This feature is intended to boost your sales by showing buyable products that match the content of the video. However, you can add all content items to the video that can be shown as a teaser, for example, Articles, Images, Collections and many more.

In order to add content items to a video, proceed as follows:

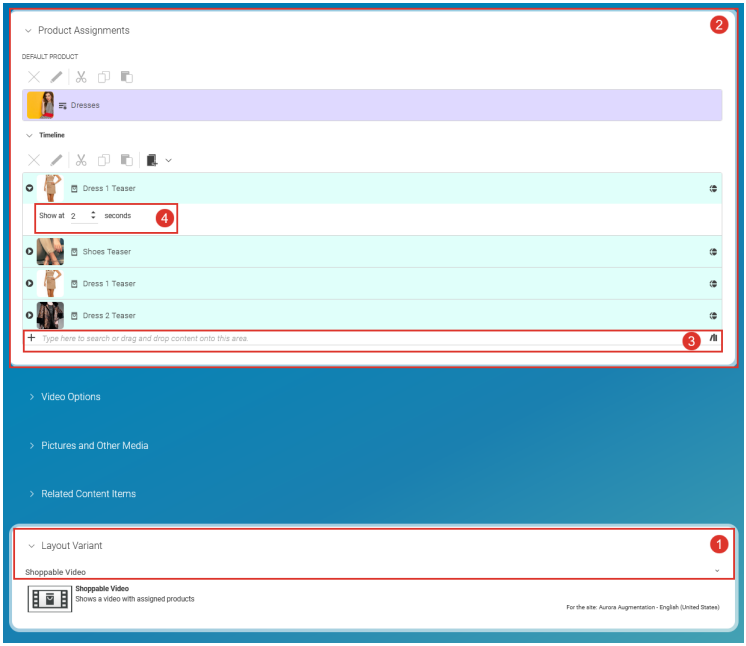


*Figure 4.93. The shoppable video editor*

1. In the *Content* tab of a Video open the *Layout Variant* panel and select *Shoppable Video* (1). The *Product Assignments* field (2) appears in the tab.
2. Drag a default product in the *Default Product* link list. The default product is shown until the first product appears on the timeline.
3. Drag other products in the *Timeline* link list (3).
4. Click the arrow to the left of the product in the timeline and enter the start time at which the product should be shown into the *Show at* box (4).

The product will be shown when the video reaches the specified point in time you have just specified. It will be hidden when the start time of another product in the timeline is reached. When no other product is in the timeline, then the product will be shown until the end of the video.

A validator warns when products in the timeline overlap.

Now you are done. The video is shown with the products beside.

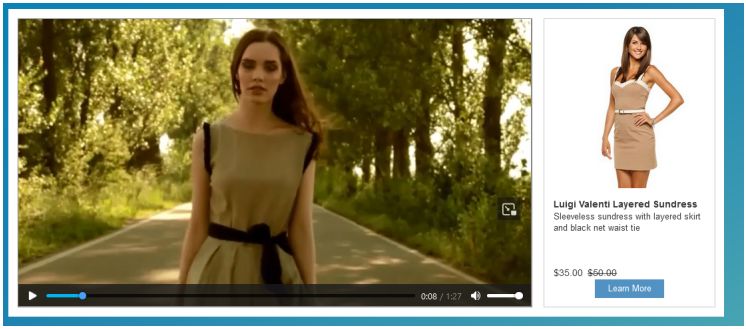


*Figure 4.94. Site preview with shoppable video*

# 4.6.12 Editing Top-N Lists

CoreMedia Elastic Social feature

*CoreMedia Elastic Social* has a specific content type called "Dynamic Elastic Social List" which you can use to create dynamic content based on *Elastic Social* data. You can select the following categories:

- Top rated: The N best rated articles
- Most rated: The N most rated articles
- Most commented: The N most commented articles
- Most liked: The N most liked articles
- Most shared: The N most shared articles

You can also determine for which interval the Top-N articles should be taken and how many articles you want to get in maximum. In order to create a new "Dynamic Elastic Social List" proceed as follows:

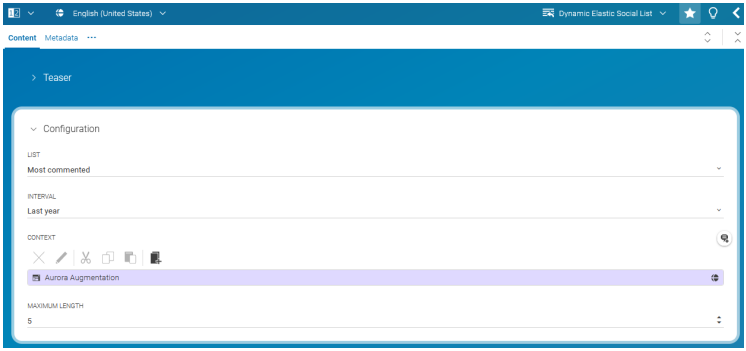


*Figure 4.95. Dynamic Elastic Social List*

1. Create a new "Dynamic Elastic Social List" content item.
2. Select the required type in the *List* field of the *Content* tab.
3. Select the required interval in the *Interval* field of the *Content* tab.
4. You can restrict the list to show only comments or ratings for a certain section, Sport for example. Just choose a page in the *Context* field of the *Content* tab.
5. Select the required number of articles in the *Maximum Length* field of the *Content* tab.
6. Save the content item.

Now you can use the new content item, for example in a "Collection" content item or directly in a page.

# 4.6.13 Setting a Displayed Date

When you change already published content, you have to publish this change. Of course, the publication changes the publication date of the content. However, you may want that this content always shows the date of the initial publication. To do so, you can set a custom displayed date.

Open the *Content* tab of the content and in the *Displayed Date* field select the option you want to use.

| | |
|---|---|
| **Publication Date** | Use the date of the last publication. |
| **Custom Date** | Enter the date that should be shown. |

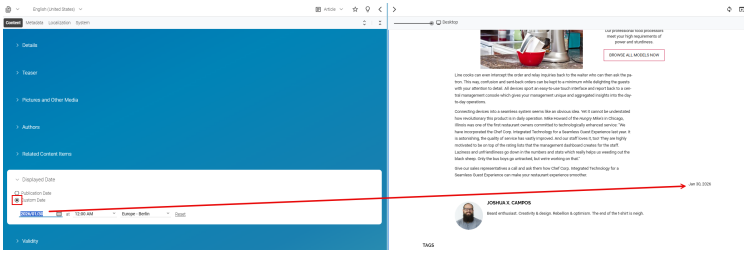

*Figure 4.96. Setting a Displayed Date*

# 4.6.14 Time Dependent Visibility

CoreMedia Blueprint Feature

You can limit the time at which a published content should be visible to the customer. To this end, there are two properties with a slightly different meaning.

- The validity, which defines the period in which a content is allowed to be shown. For example, when you have a time limited license for an image or text. Most of the content items have in the *Content* tab a field *Validity* with the *Valid From* and *Valid To* properties.
- The visibility, which defines the period in which a content should be shown to the customer at a specific position of the website. For example, during a spring campaign. You can select *Visible From* and *Visible To* for content in link lists of placements. For example for pages.

NOTE

The validity is the leading setting. That means, when the visibility starts before or ends after the corresponding validity dates, then the start or end date of the visibility will be restrained to the validity setting.

## Validity

*Figure 4.97. The Validity field*

Enter the start time from which the content item should be visible into the *Valid From* properties and the end time into the *Valid To* properties. You can check your settings in the preview and publish the content item as shown below.

When you use the content in a link list, you will see a small icon, which indicates the validity status. (1) means that the content was valid in the past, (2) means that it will be valid in the future, no icon means that the content is currently valid. Hover over the icon to get more information.

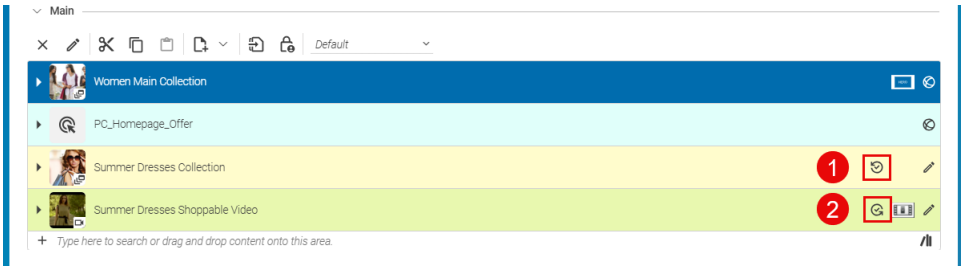


*Figure 4.98. Icons for validity*

## Visibility

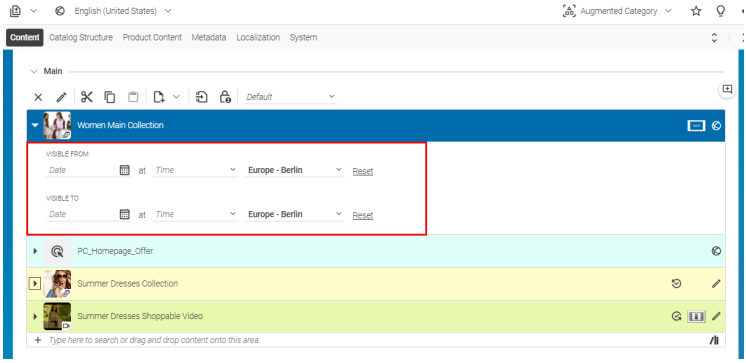


*Figure 4.99. The visibility*

Enter the start time from which the content item should be visible into the *Visible From* properties and the end time into the *Visible To* properties.

You can check your settings in the preview and publish the content item as shown below.

## Check validity and visibility in preview

| Icon | Name |
|---|---|
| | Show preview for a specific time |

*Table 4.27. Time dependent visibility icon*

### Check the time settings

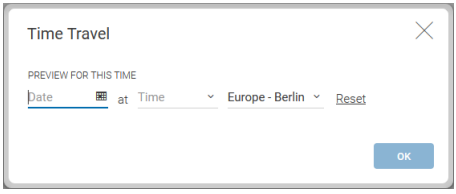


*Figure 4.100. Time Travel dialog*

You can check your content item with time dependent settings in the Preview. Proceed as follows:

1. Open the content item in the Form and click the **[Show preview for a specific time]** icon. A dialog opens.
2. Enter the time, date and timezone for which you want to check your settings into the dialog. You will immediately see the result of the setting in the preview.
3. When you are satisfied with your result, click **[Reset]** and close the dialog.

# 4.6.15 Working with Authors

*CoreMedia Studio* supports working with authors within an editorial blog. For this, you edit the personal fields (1) and optionally edit additional properties as shown here using the example of an external link (2) to a social media channel of the author. With the help of customized search lists (3), further blog entries are referenced.

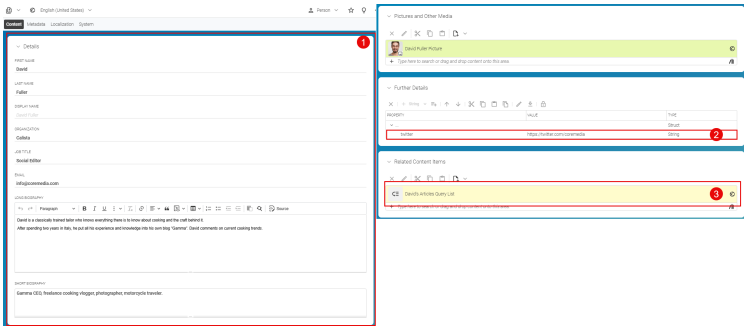

*Figure 4.101. Authors*

# 4.6.16 Metadata Management

CoreMedia Blueprint feature

*CoreMedia Blueprint* supports categorization of content items by use of taxonomies. The tags attached to a content item can be used to select content items according to their category, in a Content query editor for example. The following screenshot shows a Query List with a taxonomy condition (see Section 4.4.1.5,

"Creating Content Queries" [148]) for the Query List editor. Content items are only shown, when they are categorized as "Salad".

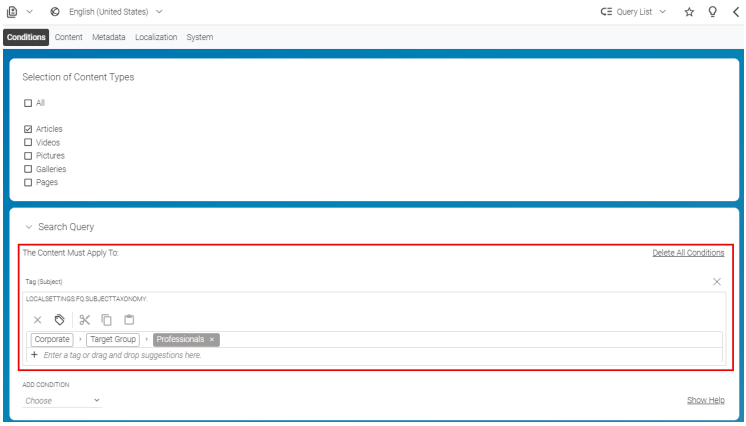


*Figure 4.102. Query List with taxonomy condition*

*CoreMedia Blueprint* supports subject taxonomies for information about the content's topic while location taxonomies associate content with a location.

| Icon | Name |
|---|---|
| | Choose Tag |
| | Add Child Tag |

*Table 4.28. Taxonomy icons*

## 4.6.16.1 Categorizing Content

You can add tags from a predefined taxonomy to a content item.

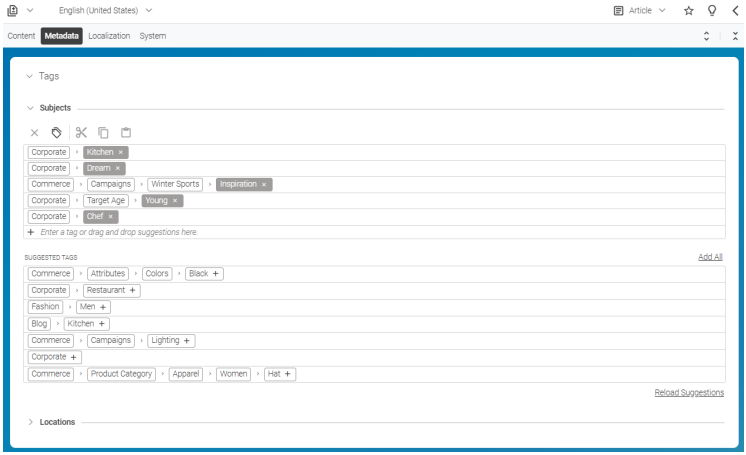


*Figure 4.103. Categorized Article*

There are three ways:

- Select an entry from the *Suggested Tags* field.
- Start typing. If the word exists in the taxonomy, you will get a suggestion that you can select.
- Click the **[Choose Tag]** icon and select the entry from the Tag Chooser. This step will be explained below.

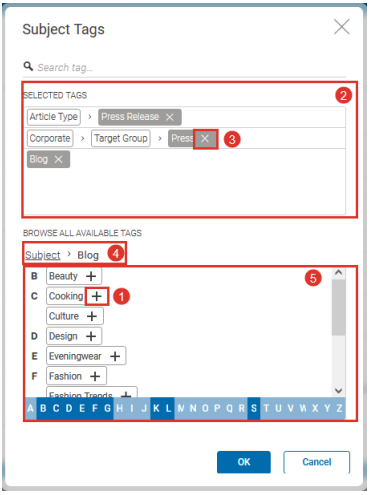


*Figure 4.104. Tag chooser*

## Using the Tag chooser

All available options are shown in the *Browse all available tags* field (5). There you will find categories (bold face), which have subentries and tags. All selected tags ore categories are shown in the *Selected Tags* field (2). The currently selected category is shown at the top of the *Tag* field (4).

### Adding a tag or category

If you want to add a tag or category to the selected tags, you have to click the + icon of a tag.

### Removing a tag

If you want to remove a tag or category from the selected tags, you have to click the - icon (3) of a tag or category in the *Selected tags* field (2).

### Opening a category

If you want to open a category in order to select a sub entry you can click or double-click the category.

## Selecting a suggestions mode

Suggestions can be determined by the system through simple name matching. Additional strategies can be implemented.

*Select a suggestions mode*

1. Open the *User Menu* and select **Preferences**.
2. Open the *Tags* tab and select the mode in the *Suggestions* field.

# 4.6.16.2 Searching for Keywords

The Library has filters for subject and location tags. So you can, for instance, limit your search results to Articles which are tagged with "Monitors".

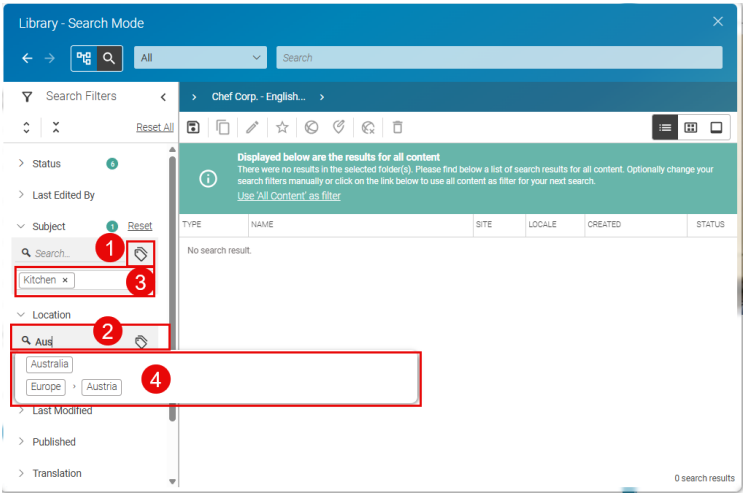


*Figure 4.105. Taxonomy filter in the Library*

## Adding filtering tags

In order to select filtering tags you can either click the **[Choose Tag]** icon (1) and select the tag from the tag chooser or you start typing in the field (2) and click one of the recommendations (4) from the existing taxonomy.

## Deleting filtering tags

In order to delete a tag, click the - sign (3) beside the tag.

# 4.6.16.3 Managing Taxonomies

A taxonomy can be used to categorize content in a consistent and hierarchical manner. *CoreMedia Blueprint* comes with a predefined taxonomy that you can adapt to your needs using the Taxonomy Editor.

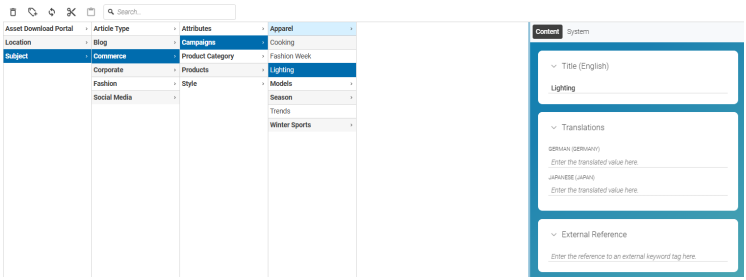


*Figure 4.106. The taxonomy editor*

Taxonomy entries are stored as content items from type `Tag` or `Location`.

## Opening the taxonomy editor

Open the Main menu and click **[Tags]**.

## Editing taxonomies

You can add, move and delete tags in the Taxonomy Editor

### Adding tags

Select a tag to which you want to add a child tag and click the **[Add child tag]** icon. A form appears where you can enter the name of the new tag (1), translations for the supported languages of Studio (2) and a link to an external reference (3). The newly created tag will automatically be saved and published to the Live System.

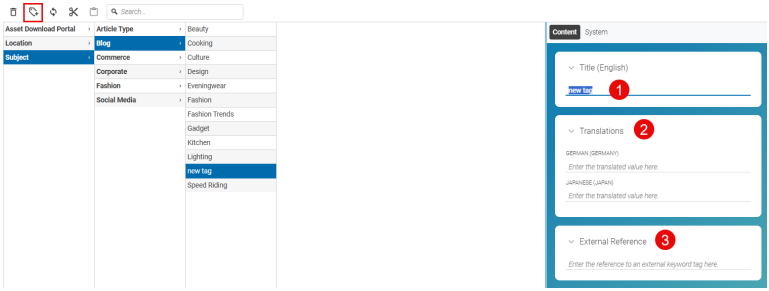


*Figure 4.107. Adding a new tag*

## Moving tags

In order to move a tag you can use drag and drop or proceed as follows:

1. Select the tag you want to move.
2. Click the **[Cut tag]** icon.
3. Select the tag to which you want to add the tag as a child.
4. Click the **[Paste tag]** icon.

## Deleting tags

If you delete a tag, you should check first if the tag is used by other content items. To do so, select the tag in the Taxonomy Editor and open the *System* tab (1). Check the *Contents which link to this content* field (2) for linking content items.

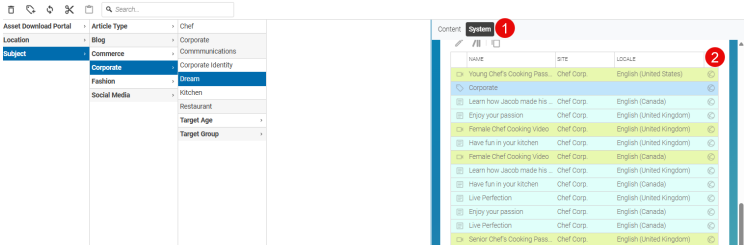


*Figure 4.108. Check for linking content items*

Double click the linking content items to open them and remove the tag from the content items.

If the content item is not linked anymore, select the tag and click the **[Delete selected tag]** icon or select **Delete Tag** from the context menu. The tag will be deleted and the corresponding content item will be moved into the trash.

# 4.7 Managing Content

This chapter describes how you can manage your content.

- Section 4.7.1, "Bookmarking Content" [245] describes how you can bookmark content.
- Section 4.7.2, "Publishing Content" [247] describes how content can be published / withdrawn to / from the live system.
- Section 4.7.3, "Localizing Content" [259] describes how content can be localized between sites.
- Section 4.7.4, "Translating Content" [261] describes how content can be translated between sites of different languages.
- Section 4.7.5, "Synchronizing Content" [277] describes how content can be synchronized
- Section 4.7.6, "Working With Projects" [283] describes how you use projects to group and share your content.
- Section 4.7.7, "Getting Keyword Recommendations" [297] describes how you can get recommendations for keywords used to categorize content.
- Section 4.7.8, "Checking Content in External Preview" [298] describes how you can watch content in an external preview.
- Section 4.7.9, "Uploading Content to Salesforce Marketing Cloud" [300] describes how you can upload content to a third-party system. Currently Salesforce Marketing Cloud is supported.
- Section 4.7.10, "Adding Comments on Content Properties" [301] describes how you comment on content, edit comments and delete comments for content.

## 4.7.1 Bookmarking Content

CoreMedia Blueprint feature

You can bookmark content items in the Form and in the Library. Simply click the Bookmark icon in the Form Toolbar or in the Library or use the context menu in the list view of the Library.

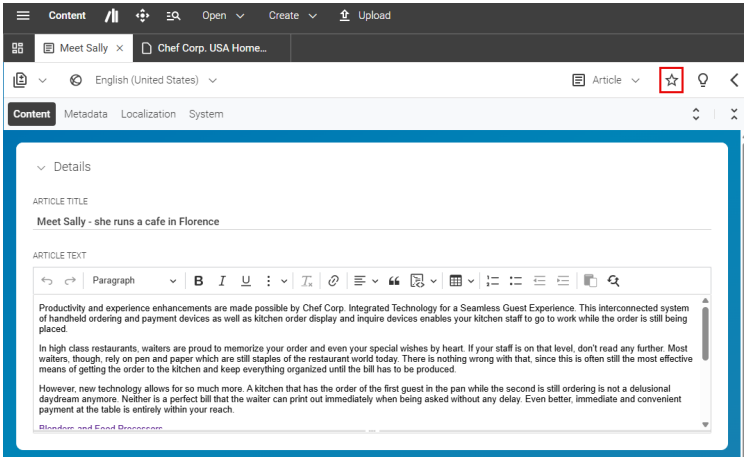


*Figure 4.109. Bookmark in the Form view*

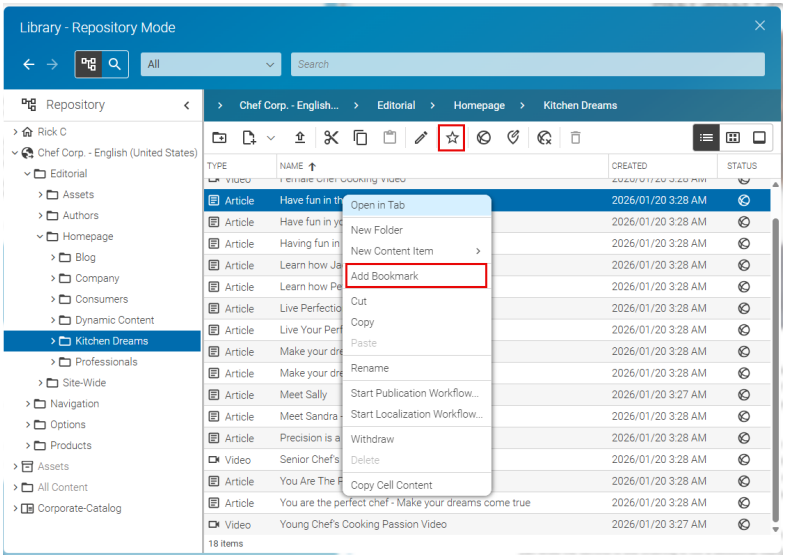


*Figure 4.110. Bookmark in the Library*

You can access your bookmarks from the *My Bookmarks* menu of the **Open** menu of the Header Bar.

# 4.7.2 Publishing Content

Before a content item can appear on your website, it must first be approved and published. Before a content item can be approved or published, it must not currently be checked out by another user. The current status of the content item can be viewed in the title bar (see Figure 4.111, “Current state of the content item” [247]). If a content item does not yet have an icon as a status symbol, then the content is still in production.

When a content should not be publicly accessible anymore, you can withdraw it.

| Icon | Name |
| --- | --- |
| | Approved |
| | Published |

*Table 4.29. Publication State icons*

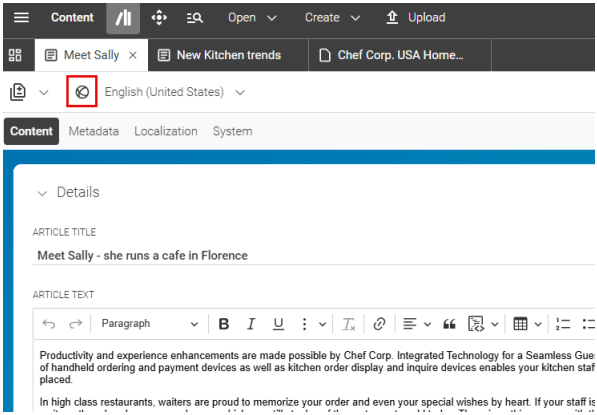


*Figure 4.111. Current state of the content item*

# 4.7.2.1 Publication Workflows

There are two workflow types available in *CoreMedia Studio*, Direct Publication and Reviewed Publication.

*Direct Publication Workflow*

The Direct Publication Workflow approves and publishes all content items included in the workflow in one step.

*Reviewed Publication Workflow*

The Reviewed Publication Workflow is a workflow that requires interaction between two content editors. One editor starts the workflow while the second editor has to approve the publication. Compared to Direct Publication this workflow is more secure because two persons are verifying the publication set.

**CAUTION**

When publishing content with the Reviewed Publication workflow, you will get warnings or error messages when assigned users do not have the appropriate rights. These messages might reveal sensitive information about users' rights, users' entitlement or maybe your organizational structure. Therefore, take care that only authorized users get access to *CoreMedia Studio*.

## Starting a Publication Workflow

1. Open a publication workflow window as described in section "Starting Workflows" [60]. In addition to the standard ways of starting a workflow, the *Action Toolbar* offers a button to start a publication workflow with the currently selected content item. This behavior can be changed, see Section 3.3.4, "Configuring the Behavior of the Publish Button" [84] for details.

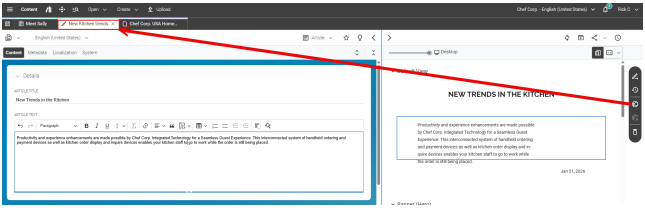


*Figure 4.112. Start Publication Workflow Window from Action Toolbar*

2. From the *Workflow Type* dropdown box (1) select the workflow type you want to start.

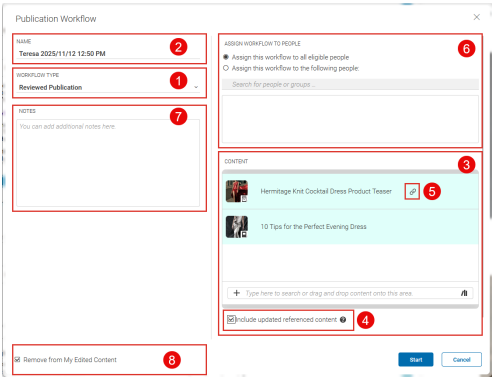


*Figure 4.113. Start Publication Workflow Window*

3. You might change the workflow name (2) and add, remove or edit content items from the publication set (3).

   The publication set is automatically extended with additional content items which also must be published to avoid dead links. For example, images that are linked from articles in the project.

   When the checkbox *Include updated referenced content* (4) is enabled, referenced content items are also included when they have been updated since their last publication. They are indicated with the chain icon (5). For more details regarding extension of content items and its limits, see section "Limit Extension Of Content Items" [95].

4. Either assign the workflow to all users with sufficient rights or to specific users (6). This area is only shown for the Reviewed Publication workflow.

   When you want to assign the workflow to specific users, select the *Assign this Workflow to the Following People* option and start typing in the text field. Keep in mind, that the search is case sensitive. You will get recommendations for users and groups. You can expand a selected group to remove users from the selection. The assigned users (with appropriate rights) will get a notification.

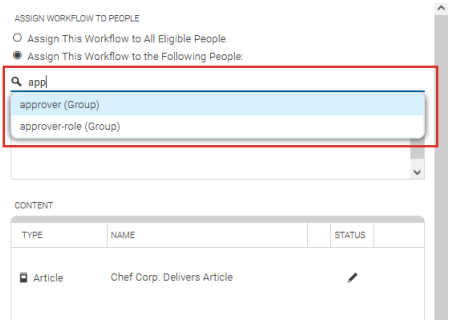


*Figure 4.114. Selecting a group or user*

Users need appropriate rights to publish content. When no one of the assigned users has these rights you will get an error message and you cannot start the workflow. If at least one of the selected users has the appropriate rights, then you will get only warnings and you can start the workflow.

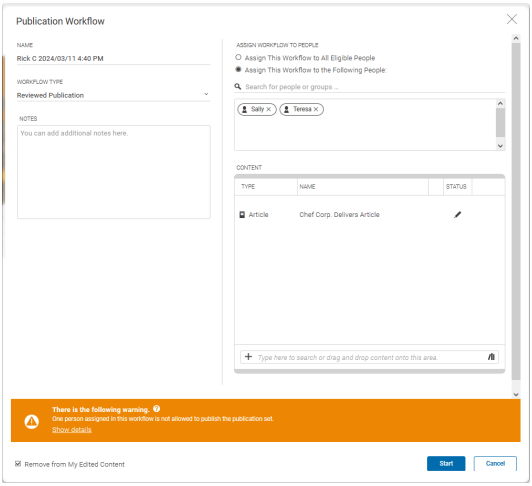


*Figure 4.115. Warning because of missing rights*

5. Add notes in the Notes area (7) to provide more information to your coworkers concerning the content included in your publication workflow.
6. When you want to remove the published contents from *My Edited Content*, select the *Remove from My Edited Content* checkbox (8). This setting will be saved in the user preferences.
7. Click **[Start]** in order to start the publication workflow.

The further steps depend on the chosen publication workflow.

## Direct Publication Workflow

The content will automatically be published and the workflow appears in your *Finished* workflow list.

## Reviewed Publication

Once the Reviewed Publication has been started, the content items included in the workflow are checked in automatically. The content items are also locked for all users except for the editor, who accepts the workflow, and the administrators.

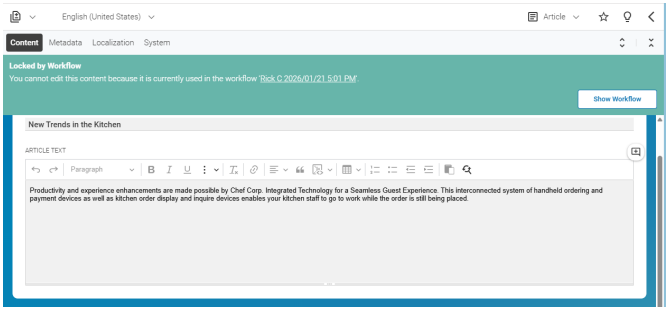


*Figure 4.116. Content form showing a locked content item*

A locked content item has state *Locked by workflow* in the status panel. You can click on the **[Show Workflow]** button to open the Workflow App containing workflow details.

The workflow appears in your *Pending* workflow list in the Control Room and is offered to other editors who have the rights to accept and finish the workflow. Here, you can also abort the workflow by clicking on the 'Abort and destroy workflows' icon. Workflows can be aborted only by the users who have started them, or by administrators. If another user views the workflow while it is aborted, the user will see a warning pop-up.

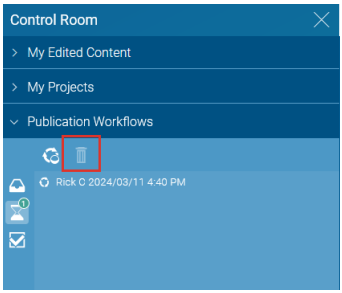


*Figure 4.117. Abort workflow*

Further processing of the workflow:

1. Another editor has to open the workflow from the Inbox by clicking on it. That opens the workflow in the attached Workflow App. Here, the editor has to click the **[Accept Task]** button to accept the task. If the editor has administration rights, the editor can also click the **[Abort]** button in the Control Room to abort the workflow.

   The workflow disappears from all other inboxes.

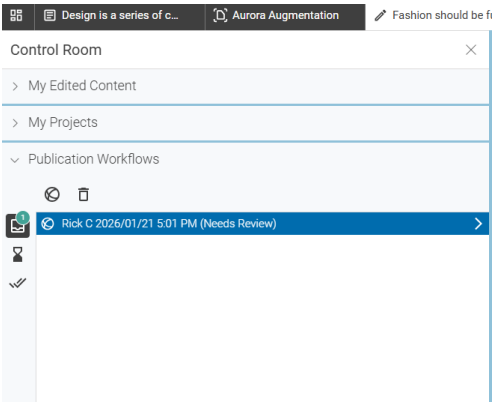


*Figure 4.118. Offered Reviewed Publication Workflow in the Control Room*

2. The editor can now add, remove and edit content items in the publication set of the newly accepted workflow if required. When the editor clicks the *Open in Content App*, then the workflow opens in an attached window in the Content App of Studio.

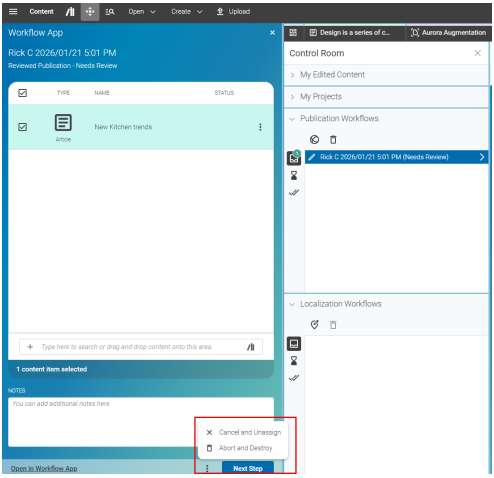


*Figure 4.119. Accepted workflow*

3. The editor has now three options:

| Option | Description |
|---|---|
| Click the three-dot menu and choose the **[Cancel and Unassign]** option | The editor does not want to approve and publish the changes. The workflow appears again in the Inbox of the other authorized users and they can accept the workflow. |
| Hit the *Next Step* button. | A window opens up from which the editor can select the next step of the workflow. |
| Click the three-dot menu and choose the **[Abort and Destroy]** menu item | This button is only visible if the user has administration rights. When clicked, the workflow is aborted if the user affirms the following confirmation dialog. |

*Table 4.30. Options to finish a workflow*

4. When the editor clicks the *Next Step* button, the following window opens up:

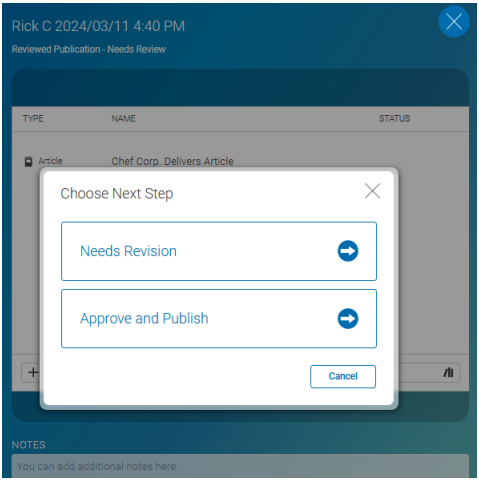


*Figure 4.120. Next steps for Reviewed Publication workflow*

The options have the following meanings:

| Option | Description |
|---|---|
| Choose the **[Approve and Publish]** step | All content in the workflow will be published. You can now see the finished workflow in the Finished view. |
| Choose the *Needs Revision* workflow step | The editor does not want to approve and publish the changes because the editor thinks that the creator of the workflow has to do some changes. The workflow appears in your Inbox, as the creator of the workflow, and you can make changes and start the publication workflow again. |

*Table 4.31. Options to finish a workflow*

5. If the editor chooses the *Needs Revision* workflow step, the workflow will appear as Compose task in the Inbox of all editors, who are assigned to the composer-role.

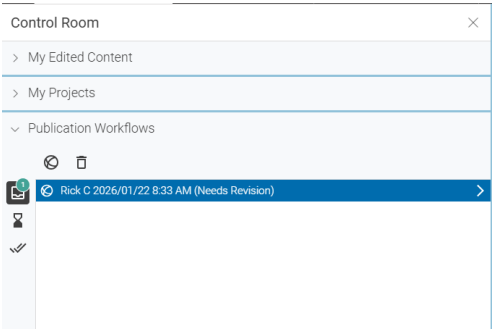


*Figure 4.121. Needs Revision Task of Reviewed Publication Workflow in the Control Room*

6. An editor can open the workflow needing revision from his Inbox in the Workflow App and sees immediately to which of his coworkers the workflow was also offered.

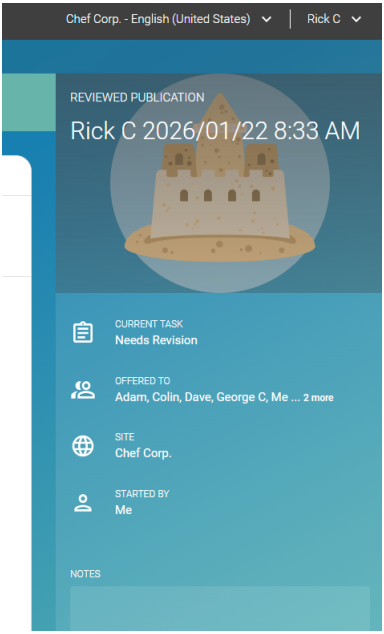


*Figure 4.122. Offered Compose Task of Reviewed Publication Workflow*

7. After the editor accepts the task, he can work on included content, modify the assignee list and comment the workflow.

## 4.7.2.2 Publication without Workflow

> NOTE
> For administrative users only.

Administrative users have the possibility to approve and publish content items directly without starting a workflow. To this end three more buttons are offered to them in the toolbar of the Library, the context menu of the Library and Control Room, and the Actions Toolbar:

| Icon | Name |
|---|---|
| | Approve |
| | Publish |
| | Approve and Publish |

*Table 4.32. Icons for Publication Actions without Workflow*

If the publication takes some time, the action bar will display a pulsating icon. As soon as publication is complete, a success message is shown on the lower right of the screen. If an error occurred during publication, then the publication window will appear, providing details of how to resolve the problem.

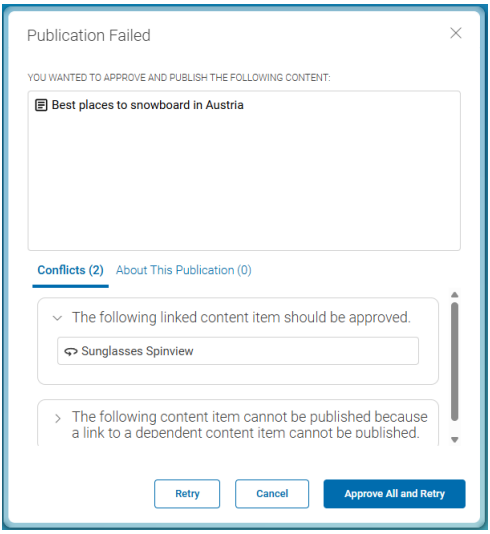


*Figure 4.123. Publication window with problems*

The publication window displays a list of the content items that you intend to publish. Below this list, two tabs provide additional information about the failed publication. The *Conflicts* tab (1) lists both the errors and the content items affected. To complete publication, resolve the errors and then click **[Retry]** (3). You can click with the mouse to open these content items in the Workspace and resolve the errors there. If you are sure that you want to approve all linked content, simply click the **[Approve All and Retry]** button (3). In the screenshot shown, you would need to first approve the "Irishstew" content item to be able to complete publication.

The *About this publication* (2) displays additional information about the publication. This information concerns content items and folders that would also have been published if the publication had been successful.

# 4.7.2.3 Withdrawing Content

Withdrawing content, means to remove the content from the live website. Withdrawing content is also a prerequisite before you can move it into the recycle bin.

| Icon | Name |
| --- | --- |
| | Withdraw |

*Table 4.33. Icon for Withdrawal*

In order to withdraw content proceed as follows:

1. Open the content item in the Form or select it in the Library.
2. Click the *Withdraw* icon in the Action bar or in the library.

The content has been removed from the live environment. You can still edit it in the production environment.

If the content item is linked from other content items in the live environment, then the withdrawal fails and an error dialog opens up, see Figure 4.124, “Dialog when content has incoming links” [259]. The *Conflicts* field (2) shows which content items are linking to the content. In order to fix it, you can either remove the links or also withdraw the linking content items.

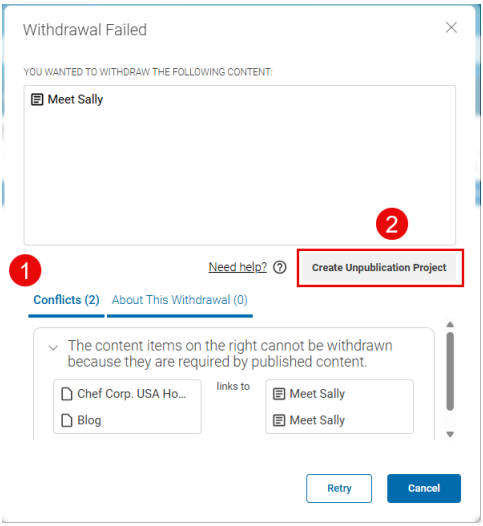


*Figure 4.124. Dialog when content has incoming links*

NOTE

Since content items in a CoreMedia site are heavily linked (for example, a Page links to a Page, links to a Collection, links to an Article, links to a Picture) you might end up, removing all content items when you remove the linking items.

Therefore, removing the link will in most cases be the recommended solution.

When you want to withdraw the linking content items, click the **[Create Unpublication Project]** (2) button. This opens a project where you can collect the other linking content items and withdraw them all together (see Section 4.7.6.5, "Withdrawing a Project" [295] for details).

# 4.7.3 Localizing Content

*CoreMedia Content Cloud* lets you manage sites in different locales with the same or a different language (see Section 2.10, "Multi-Site and Multi-Language" [61]for details).

- For propagating changes into a site with different language, see Section 4.7.4, "Translating Content" [261].

For propagating changes into a site with a different region, but using the same language, see Section 4.7.5, “Synchronizing Content” [277].

NOTE

In addition to these sections, also have a look into the Multi-Site Manual. The manual describes different options to design your site hierarchy and gives some guidance to avoid common pitfalls when working with multi-site content.

Both, *Translation* and *Synchronization* are based on the same underlying multi-site features. Every derived content item has a respective master content item in the master site that it is derived from and by default, changes in the master are tracked to for example inform the editor offering to trigger a *Translation* or *Synchronization* workflow.

However, you can also decide to not track the changes of the master content item, for example if you want to manage the content item of the derived site independently of the master site.

## 4.7.3.1 Disable Updates From Master

When you have derived a site, all content of the derived site is expected to be updated when the respective master content item is changed. For example, when there is a new version of the master content item, a derived content item will be marked as *not up-to-date* and it might be included in localization workflows when it is referenced by other content items.

If you do not want to keep updating a derived content item, you can disable the updates from its master:

Open the content and, in the *Localization* tab, check the *Disable updates from master* checkbox.

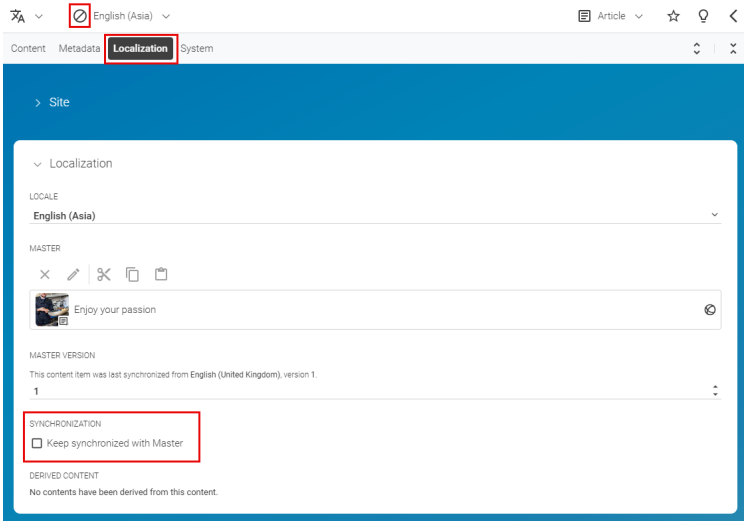


*Figure 4.125. Disable updates from master*

From now on, changes in the master content will not be propagated to this content in the derived site. This is indicated by the marked icon in the Form toolbar.

NOTE

Automatically merging can also be deactivated for selected properties in the content type model by your developer using the `extensions:automerge` attribute. So, there might be properties in your content which will not be automatically merged even when *Disable updates from master* is unchecked.

# 4.7.4 Translating Content

NOTE

CoreMedia offers an integration with GlobalLink Connect Cloud in CoreMedia Labs. If your company uses this integration, you can find the documentation on GitHub Pages at https://coremedia.github.io/coremedia-globallink-connect-integration/ .

*CoreMedia Content Cloud* lets you manage sites in different languages (see Section 2.10, "Multi-Site and Multi-Language" [61] for details). It supports the translation process with the side-by-side view, a translation workflow, export and import of content in the standard *XML Localization Interchange File Format (XLIFF)* and lets you derive an existing site for translation.

NOTE

In addition to these sections, also have a look into the Multi-Site Manual. The manual describes different options to design your site hierarchy and gives some guidance to avoid common pitfalls when working with multi-site content.

*Properties that do not need translation*

When you translate a content, most properties that do not need translation will be updated to the content of the master property. For example, you have an integer property which contains the weight of a product and you change it in the master, then the weight will be updated in the derived site, when you start a translation workflow. However, this behavior can be changed in the content type definition (see Section 4.1, "Properties" in *Content Server Manual* for details). So, there might be properties which will not be updated.

| Icon | Name |
|---|---|
| | Derive site |
| | Translation to derived sites |
| | Translation to preferred site |
| | Download XLIFF |
| | Compare content items |

*Table 4.34. Icons for Translation*

# 4.7.4.1 Preparing Translation: Deriving a Translated Site

Deriving a new localized site means that you create a copy of an existing site. The content, structure and appearance of the new site is exactly like that of its master. Afterwards, you can start the translation of the derived content.

In order to derive a site, do the following:

1. In the Header Bar open the **Main** menu and select **Sites**. The sites window opens.

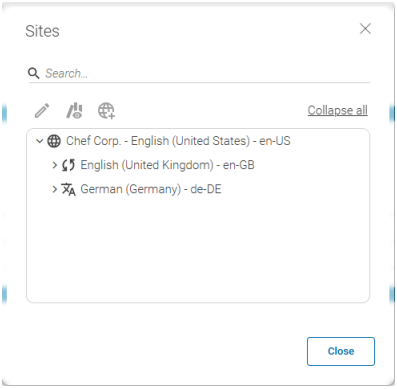


*Figure 4.126. Sites Window*

2. Select the site you want to derive from and click the *Derive a new Localized Site* icon. Alternatively you may use the context menu. A modal window opens up.

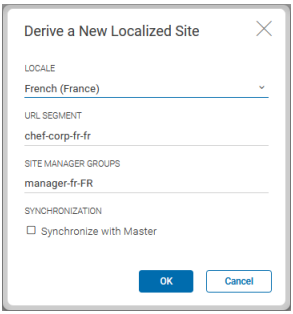


*Figure 4.127. Derive a site dialog*

3. By default, the *Locale* field will be filled with the locale of the master site and will be marked red, because the locale has to be unique. Therefore, you have to choose a new locale first. Subsequently, new values for the URL segment and the site manager group will be calculated automatically using the selected locale. (You can add new locales to the `/Settings/Options/Settings/LocaleSettings` content.)

   The URL segment, which will be part of the URL that leads to this site, must also be unique. In the unlikely event that the calculated URL segment already exists, the field will be marked red and you have to insert a new value.

   If one of the site manager groups has not been created yet, the corresponding field will be marked red. Enter names of existing user groups separated by comma or create one for the calculated name. See also Section 3.15, "User Administration" in *Content Server Manual*. When you want to use a new group that you have to create first, you have to restart the deriving process after you have created the group.

### Folder Rights

If some of the given groups do not have sufficient permissions to access the newly created site, they will get required rights assigned. New rights apply directly to the newly created site-root-folder. Note, that this does not apply to possibly required rights outside of the site folder, like for example global folders for Themes and Settings.

It is recommended, that the chosen groups have all required workflow roles applied, which especially the group `translation-manager-role`. Role assignment is not part of the site derivation process.

4. Click *OK*. The site will now be derived. This can take some time, depending on the size of your site.

If the site folder does not exist, yet, it will be created. Adjust its rights rules if desired. For example, the site manager group has no rights on the newly created site folder.

You see the derived site as a subsite of the master site.

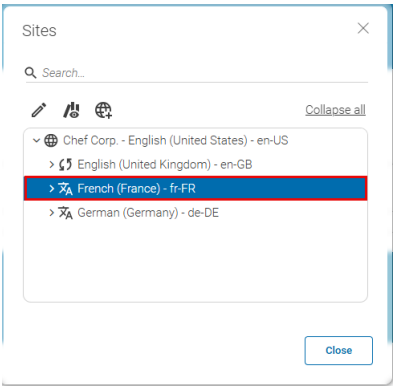


*Figure 4.128. Derived Site in Sites Window*

# 4.7.4.2 Preparing Translation: Find Content Items That Need Translation

## Translation State Dashboard Widget

To support you in finding content items in a site that need to be translated, you can use the Translation State Dashboard Widget and the Translation State Library Filter. The dashboard widget gives you an overview of the translation state of the selected site. It displays five different states:

- *New in Master*

  Content items that only exist in the master and not in the local site
- *Master Updated*

  Content items that have been localized to the local site but in the meantime have a new version in the master site, and are not in translation, yet
- *Not Translated Yet*

  Content items that have been copied to the local site when the site was cloned, but have neither been translated nor are currently in translation

- *In Translation*

  Content items that are already being translated to the local site in some version

- *Up to Date*

  Content items the current versions of which have been translated to the local site

The local site can be configured in the widget's edit mode. For each of the states the number (absolute and relative) of content items in this state are visualized as a bar chart.

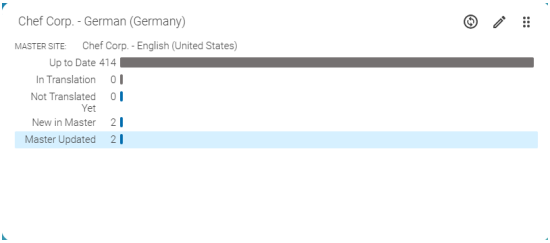


*Figure 4.129. Translation State Dashboard Widget*

## Library Translation State Filter

A click on a row of the chart opens the library in search mode with the library filter set to the translation state of the clicked bar. The library then shows the content items in the master site for the selected states, so that you can directly start a translation from here.

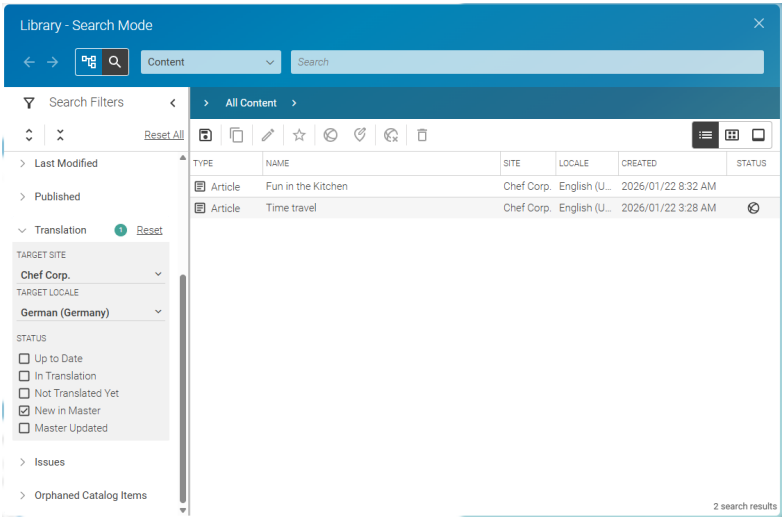


*Figure 4.130. Translation State Library Filter*

## Locale Switcher

In addition to these overview options, you an also check for each open content item separately, if a translation is needed. Use the locale switcher at the top of the content item form (see ???) for details about the locale switcher). In the next screenshot, you see that the French content item needs translation.

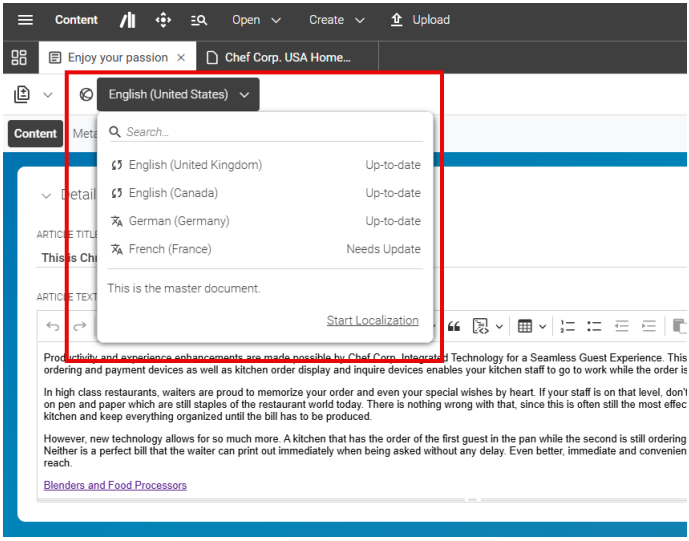


*Figure 4.131. Locale Switcher*

# 4.7.4.3 Comparing Translation

Similar to the version comparison view (see Section 4.6.2, "Comparing Versions" [173]) *CoreMedia Studio* also provides a master side-by-side view for the localization process. The read-only side of the side-by-side view shows the master content item and highlights the differences between the latest translated master version and a master version of your choice. If opened directly from the translation workflow detail panel, the master version to be translated is preselected.

The view offers all the elements known from the version comparison view like the list of changed fields, the version selector, and change highlighting.

The master side-by-side view can only be opened for content items that have a master content item defined.

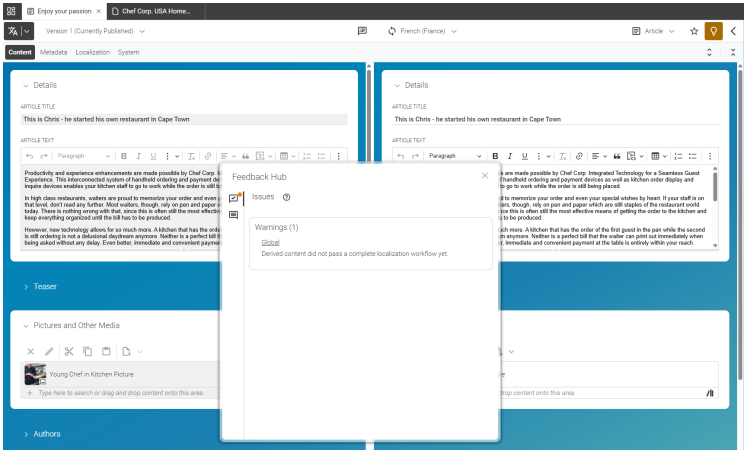


*Figure 4.132. Side-by-Side view*

Figure 4.132, "Side-by-Side view" [269] shows a content item in German side by side with the English master content item. The master item is grayed out, because you can only edit the depending version.

## Opening the Side-by-Side View

There are two ways to enter the master side-by-side view:

- By clicking the *Compare contents* icon.
- By double clicking the content in the translation workflow detail panel.

## Closing the Side-by-Side View

Click the *Compare contents* icon again in order to close the master content item.

# 4.7.4.4 Performing Translation: Start, Finish and Abort

You can use translation workflows to coordinate translations in the derived sites. As site manager of a master site, you may trigger workflows to delegate translation to the site managers of the derived sites. As site manager of a derived site, you may trigger a workflow to retrieve updated contents from the master site for translation.

NOTE

To start a translation workflow the rule applies, that you have to be a member of the group translation-manager-role. In addition to that, you generally need to be either set as a site manager of the master site or as a site manager of the target site (or sites).

More details and alternatives to the rule, that may be relevant for administrators, for example, can be found in Groups and Rights Administration for Localized Content Management in *Blueprint Developer Manual* .

For more information on administrating users, take a look at Section 3.15, "User Administration" in *Content Server Manual*.

If content does not exist in a target site, it will be created automatically. This also applies to links in the original content that have not been translated yet. Thus, your project will also contain these contents.

Contents will always be created in a folder structure identical to that of the master content. So if this folder has been removed or renamed in the target site, it will be created again.

## Translation Actions

While the process of starting a translation differs slightly (see Section "Translation to Derived Sites" [273] and Section "Translation to Preferred Site" [275]) the actions you may perform while translating contents are always the same. Once the translation workflow detail panel opens (Figure 4.133, "Translation workflow detail panel next steps" [270]), you have several options:

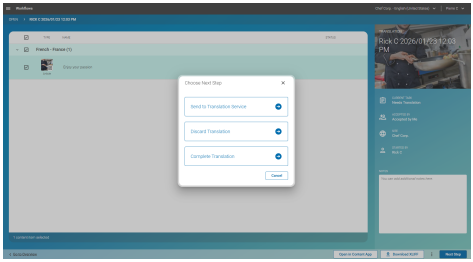


*Figure 4.133. Translation workflow detail panel next steps*

- You decide that the content needs no translation (see section "Reject Changes" [271])

- You want to translate the content manually in *Studio* (see section "Manually translate the content" [271])
- You want to translate the content with a translation memory system using XLIFF (see section "Translating the Content with XLIFF" [271])

### Reject Changes

The translation of the offered content is not needed for this site. By rejecting the translation, content that has been created automatically by the translation workflow will be deleted.

1. Select the *Discard Translation* link and confirm your choice in the opening dialog with **[Yes, continue]** .

### Manually translate the content

1. Double click the content that you want to translate. It opens in the master side-by-side view (see Section 4.7.4.3, "Comparing Translation" [268]). Fields that need translation are highlighted with a green border.
2. Start to translate the content.
3. When you are done with the translation, select *Complete Translation* and confirm your choice in the opening dialog with **[Yes, continue]** .

The translation workflow is finished. The master versions of the translated contents will be set to the current version of their masters automatically.

### Translating the Content with XLIFF

The XML Localisation Interchange File Format (XLIFF) is a standard format for translations with translation memory systems. With *CoreMedia Content Cloud* you can export and import content as XLIFF files.

1. Export the content as an XLIFF file by clicking the button **[Download XLIFF]** in the Workflow App.

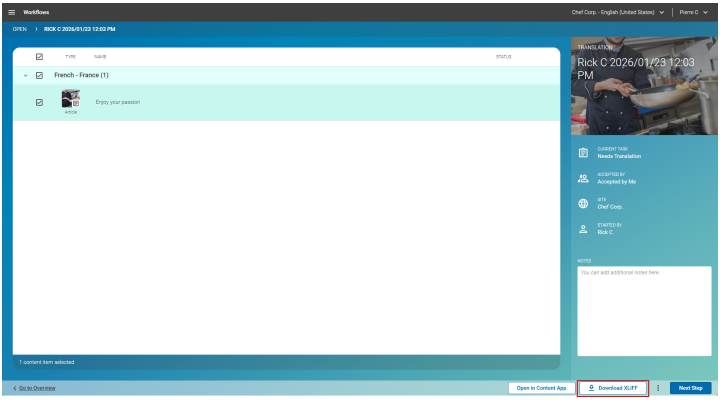


*Figure 4.134. Download XLIFF file*

The file will be stored in the download folder of your system.

2. Depending on your review process you might now either choose to wait and keep the translation workflow assigned to yourself or you might consider choosing *Send to Translation Service* and click **[Apply]**. In this case a new task, a review task, will be created which is offered to all responsible site managers. Thus, after the results of the translation service are available anyone might take the task and continue the workflow as stated below.
3. When you have finished the translation, import the XLIFF file again as described in section “Importing an XLIFF file” [272].
4. When you have imported the XLIFF file select *Finish Content Localization* and click **[Apply]**.

## Importing an XLIFF file

Importing a translated XLIFF file is quite easy. Simply proceed as follows:

1. Open the upload dialog from the *Upload* menu in the Header bar (see Section 4.4.1.6, “Uploading Files” [151]) or click the *Upload files* icon in the Library. The upload dialog opens.
2. Drag the XLIFF file into the upload dialog and press **[OK]**.

The imported content item opens after the import is completed. A pop-up window displays issues that may have occurred during the import.

# Translation to Derived Sites

In order to start a workflow as a manager of the master site to delegate translation to the site managers of the derived sites proceed as follows:

1. Open a translation workflow window as described in section “Starting Workflows” [60].

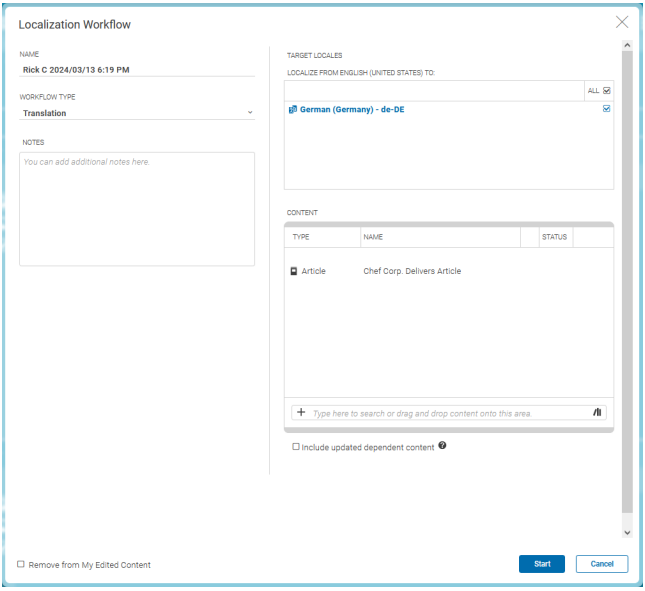


*Figure 4.135. Translation Workflow Window*

2. Edit the workflow. You can do the following:
   - Change the name in *Workflow Name*.
   - Decide in the area *Dependent Content Excerpt*, if besides the required content also updated dependent contents should be included.

     *Required dependent contents* are those, which are referenced by your selected content and which are missing in at least one of the selected target sites. They are required to keep links within the same site (in-site links) consistent.

*Updated dependent contents* are those, which are referenced by your selected content but already exist in all selected target sites. Their translation is out of date in at least one of the selected target sites.

*Special notes on dependent content*:

- *Excerpt only*

  The list of dependent content can be huge. That is why only a limited set of contents (100, by default) is shown in Studio. The workflow will take care of expanding the full list of dependent content.

- *No automatic check-in*

  In contrast to your selected content, dependent content will not be checked in automatically. This may cause your translation workflow to fail later.

### Make dependent content explicit

To work around the above issues, consider dragging dependent contents to your explicitly selected content set. The excerpt will be filled again, up to a given limit, and the now explicitly selected contents will not only be automatically checked-in, they will also be respected during content-state validation prior to starting the workflow.

You may subsequently add all dependent contents to the selected content, which ensures that all available pre-validation is performed which reduces the chance of the translation workflow to fail.

- Select the locales to which you want to translate in *Target Locales* (if no locale has been selected, the validator shows an error),
- Add notes in the *Notes* area to provide more information to your coworkers concerning the content included in your translation workflow,
- Chose to remove the translated contents from *My Edited Content* by selecting the *Remove from My Edited Content* checkbox. This setting will be remembered in the user preferences.

3. Click **[Start]** to create a translation workflow for every selected locale.

The translation workflow will appear in the *Translation Workflow* panel in the *Control Room* or in the Workflow App of the users who are members of one of the site manager groups of every target site. Each member will be notified about this.

# Accepting Translation Workflows

Each started translation workflow will be offered to the members of one of the site manager groups of the target site. Those users will find the new workflow in the *Translation Workflow* panel of their *Control Room*.

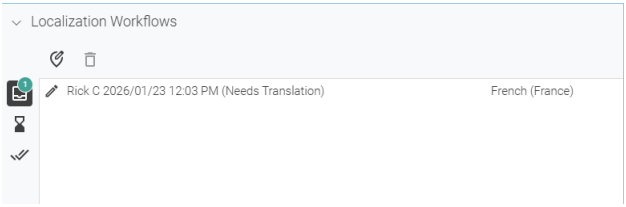


*Figure 4.136. Translation workflow panel*

1. Double-click the list item in the workflow panel or click the arrow in the selected list item to open the translation workflow in the Workflow App. Check the task, for example by opening content from the workflow with a double-click, and decide whether you want to accept it and perform the translation.
2. Click **[Accept Task]** when you want to perform the translation.

After the task has been accepted, all non-translatable properties in the master content will be applied automatically to the derived content in the translation task. This helps to keep binary and structural data in sync between sites, such as images, crops, settings, and the navigation hierarchy, and complements the XLIFF-based update of translatable properties.

If the merge fails for some reason, a warning will be displayed in the issues of the translation task.

# Translation to Preferred Site

In order to retrieve updates from the master site of your preferred site, you can start a workflow as follows:

1. In the library select contents available in the master site and choose **[Translate into the preferred site]**
2. Click **[Start]** in order to start the workflow
3. In contrast to the process as a global site manager (see Section "Translation to Derived Sites" [273]) the workflow will be directly assigned to you and opened in the *Workflow App*.

# Translation via Drag and Drop

To start a translation you can also drag and drop content into the *Translation Workflows* area in the *Control Room* (see Section 2.4.1.1, “Control Room” [29]). The *Localization Workflow* window opens and you can start the workflow.

If the started content belongs to the master site of your preferred site, the workflow will be directly assigned to you and opened in the *Workflow App* as described in Section “Translation to Preferred Site” [275].

# Aborting a Workflow

A translation workflow can only be aborted by the creator of the workflow or by an administrator. You can abort the workflow either in the *Control Room* or in the Workflow App.

- Go into the *Translation Workflows* area of the *Control Room*, and select the workflow. Click the *Abort and destroy workflows* icon.

*Figure 4.137. Aborting translation workflow in Control Room*

- Go into the *Workflow App* and find the workflow in the overview. Right-click on the workflow and select *Abort and destroy* from the context menu.

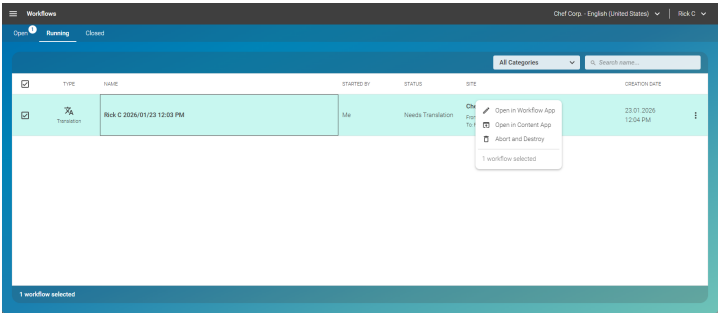


*Figure 4.138. Aborting translation workflow in Workflow App*

Content items that were automatically created for the translation will *not* be deleted. If you want them to be deleted, you have to reject the workflow instead (see section “Reject Changes” [271]).

## 4.7.5 Synchronizing Content

*CoreMedia Content Cloud* lets you manage sites in different locales but with the same language (see Section 2.10, “Multi-Site and Multi-Language” [61] for details). In this use case, it is assumed that most of the content of the derived site should be the same as in the master site. To do so, the content of the derived site can be synchronized with all changes made at the master site. The CoreMedia system supports the synchronization process with the side-by-side view, a synchronization workflow and lets you derive an existing site for synchronization.

| Icon | Name |
|---|---|
| | Derive site |
| | Start a localization workflow |
| | Compare content items |

*Table 4.35. Icons for Synchronization*

NOTE

In addition to the following sections, also have a look into the Multi-Site Manual. The manual describes different options to design your site hierarchy and gives some guidance to avoid common pitfalls when working with multi-site content.

# 4.7.5.1 Deriving a Synchronized Site

Deriving a synchronized site means that you create a copy of an existing site. The content, structure, and appearance of the new site are exactly the same as those of its master. Afterwards, you can keep the state of the derived site in sync with the state of the master site. A derived site can also be the master site for another derived site.

*Synchronize Content*

## Example:

You have a master site, for example an English site for the United States, and you need another site, also in English, for the United Kingdom. The UK site should use all the content from the US site. You also want to have a Asian site, which uses most of the content of the UK site. So, you derive a UK site from the US site and the Asian site from the UK site. When you have changes in the US master site, you start a synchronization workflow. In this case, changes in the master site are propagated to the UK site and also to the Asian site by default. This is continued until no more synchronized sites can be found. However, you can also exclude sites from the synchronization.

In order to derive a site, do the following:

1. In the Main menu select **Sites**. The sites window opens.

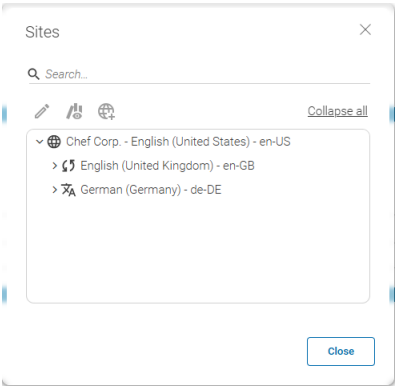


*Figure 4.139. Sites Window*

2. Select the site you want to derive from and click the *Derive a new Localized Site* icon. Alternatively, you may use the context menu. A modal window opens up.

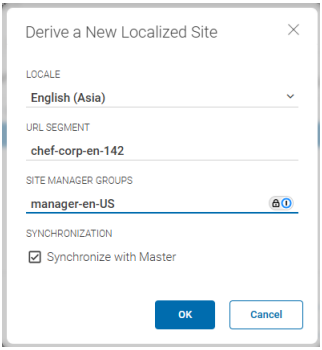


*Figure 4.140. Derive a site dialog*

3. By default, the *Locale* field will be filled with the locale of the master site and will be marked red, because the locale has to be unique. Therefore, you have to choose a new locale first. Subsequently, new values for the URL segment and the site manager group will be calculated automatically using the selected locale. (You can add new locales to the `/Settings/Options/Settings/LocaleSettings` content.)

   The URL segment, which will be part of the URL that leads to this site, must also be unique. In the unlikely event that the calculated URL segment already exists, the field will be marked red and you have to insert a new value.

If one of the site manager groups has not been created yet, the corresponding field will be marked red. Enter names of existing user groups separated by comma or create one for the calculated name (see Section 3.5.4, "Creating a New Group" [107]). See also Section 3.15, "User Administration" in *Content Server Manual*. When you want to use a new group that you have to create first, you have to restart the deriving process after you have created the group.

4. Check the *Synchronize with Master* checkbox.
5. Click *OK*. The site will now be derived. This can take some time, depending on the size of your site.

   If the site folder does not exist, yet, it will be created. Adjust its rights rules if desired. For example, the site manager group has no rights on the newly created site folder.

You will see now the derived site as a subsite of the master site.

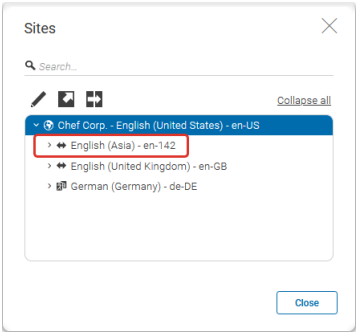


*Figure 4.141. Derived synchronized sites*

## 4.7.5.2 Synchronizing Changes between Master and Derived Site

When you have derived a synchronized site, you have to keep it in sync with the master site. To do so, you use the Synchronization workflow.

In order to synchronize the changes you have applied at the master site, do the following:

1. From the master site, select the content items that have changes that you want to synchronize with the derived sites.

2. Open a localization workflow window as described in section "Starting Workflows" [60].

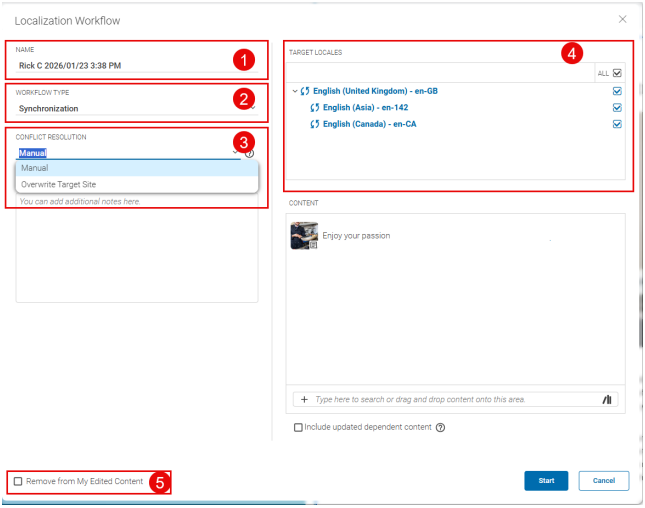


*Figure 4.142. Localization Workflow Window*

3. In the *Workflow Type* field (2) select the *Synchronization* workflow.
4. Edit the workflow:
   - Content in a synchronized site is not locked or secured in any way. That is, you can edit content of a synchronized site like any other content. However, when both the master content and the content of the synchronized site have changed, then there is a conflict. Select one of the following solution strategies from the *Conflict Resolution Strategy* field (3):
     - Manual

       When there are conflicts, the workflow escalates. You have to resolve the conflict and start the synchronization again. You can use the Side-by-side view to compare both versions (see Section 4.7.4.3, "Comparing Translation" [268] for details).
     - Overwrite Target Site

       When there are conflicts, the content of the master site will overwrite the conflicting content of the synchronized site.
   - You can change the name in *Workflow* (1),

- You can choose to remove master contents from *My Edited Content* (5) by selecting the *Remove from My Edited Content* checkbox. This setting will be remembered in the user preferences.
- You can exclude sites from the synchronization in the *Target Locales* field (4). By default, all synchronized sites are selected. When you exclude a site, then all subsites are also excluded and when you include a subsite, then all parent sites are also included.

  When you exclude a site that has included subsites, a warning dialog opens up. Click **[Deselect All]** to deselect all subsites. You can disable the warning by checking the *Do not show this message again* checkbox. You can enable the warning again in the *Preferences* dialog (see Section 3.3.13, "Configuring Warnings" [96]).

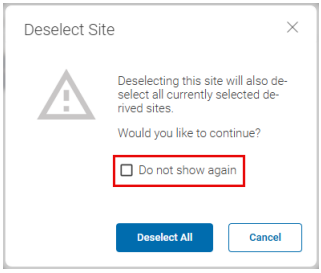


*Figure 4.143. Warning for deselected subsites*

5. Click **[Start]** to start the synchronization workflow. The workflow runs without further user interaction.

NOTE

To start a synchronization workflow the rule applies, that you have to be a member of the group translation-manager-role. In addition to that, you need to be set as a site manager of either the current site or any of the sites above within the hierarchy.

More details and alternatives to the rule, that may be relevant for administrators, for example, can be found in Groups and Rights Administration for Localized Content Management in *Blueprint Developer Manual* .

For more information on administrating users, take a look at Section 3.15, "User Administration" in *Content Server Manual*.

The changes are applied to all selected synchronized sites, and the changed items appear in the *My Edited Content* field from where you can publish the changes.

NOTE

Keep in mind that content items are not synchronized, when you have checked the *Disable updates from master* checkbox of the derived content (see Section 4.7.3.1, "Disable Updates From Master" [260]). Further, the properties for which your developers have set the `extensions:automerge` attribute to false in the content type model are also not synchronized.

# 4.7.6 Working With Projects

With projects you can group content and manage and edit it collaboratively. Projects are created in the Control Room (see Section 2.4.1.1, "Control Room" [29]) and managed in project tabs.

| Icon | Name |
|---|---|
| | Create project |
| | Leave a project |
| | Open project in tab for editing |
| | Start a publication workflow |
| | Start a localization workflow |

*Table 4.36. Icons for project management*

## 4.7.6.1 Creating and Populating Projects

You create projects in the Control Room in the following ways:

## Creating a project from *My Edited Content*

1. Select one or more items in the *My Edited Content* section of the Control Room.
2. Right click on the selected item and select **Create project**. Alternatively, you can use the *Create project* toolbar button.
3. A new project is created in the *My Projects* section, filled with the selected content items. Enter a name for your new project. The project tab opens and you can further edit the project.

Do not worry when you missed some content. Later, you can add more items to the project.

## Creating a project from *My Projects*

1. Click the *Create a new empty project* icon in the *My Projects* toolbar in order to create an empty project with no linked content items.
2. A new project appears in the *My Projects* section. Enter a name for your new project. The project tab opens and you can further edit the project and add content items as described below.

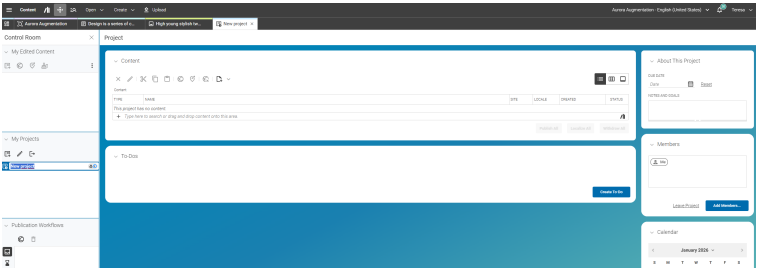

*Figure 4.144. Newly created project*

## Creating a project by drag and drop

1. Select one or more items in the *My Edited Content* section of the Control Room or from the *Library*. Drag and drop the selected content items onto the *My Projects* section.
2. A new project with the selected content from step one appears in the *My Projects* section. Enter a name for your new project.

The project tab opens and you can further edit the project. Add additional content items to the new project as described below.

## Creating a project from the withdrawal error window

When you withdraw content (see Section 4.7.2.3, "Withdrawing Content" [258]) and you get an error because other published content links to this content, you can create a withdrawal project from the error window to also withdraw the linking content.

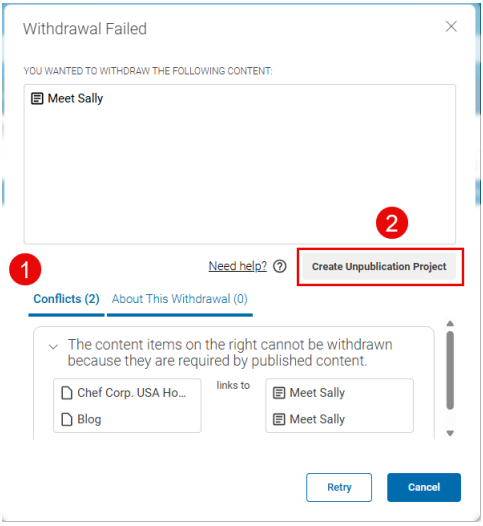


*Figure 4.145. Withdrawal error window*

Click the **[Create Unpublication Project]** button (2) in order to create the project.

When the project has been created, you can add the linking content to the *Content* field and later on start the withdrawal (see Section 4.7.6.5, "Withdrawing a Project" [295]).

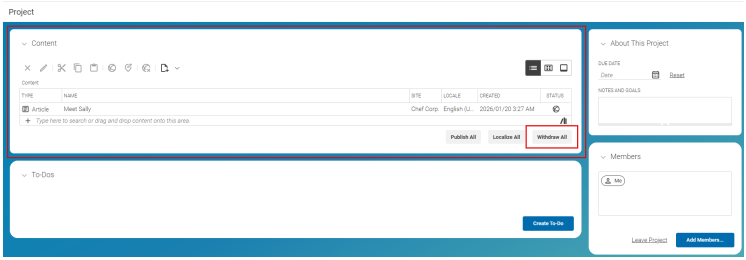


*Figure 4.146. Withdrawal project*

# 4.7.6.2 Editing Projects

When you have created a project, you can start editing it. This involves the following steps:

- Adding a description to the project.
- Adding content items to the project or removing them.
- Adding coworkers to the project or remove them.
- Adding to-dos to the project.
- Mark to-dos as finished.

## Adding a Description

1. Double-click the project in the *My Projects* section of the Control Room. Alternatively, click ✎ or select **Open in Tab** from the context menu.

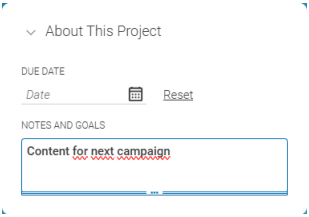


*Figure 4.147. About this Project section of a project*

2. In the *About this Project* section, click the 📅 icon and select a due date from the calendar.
3. Add a description of the project into the *Notes and Goals* field.

# Editing Content from Projects

Projects show the assigned content in the *Content* property of the project. The property combines functionality of a link list property (copy, paste, create content…) with functionality of the library (sorting of columns, tree and tile view…). You have several ways to add content to a project:

*Figure 4.148. Content field of the project tab*

- Drag content, from the Library, for example, onto the project in the *My Projects* list.
- Drag content onto the tab title of a project, wait a few seconds until the project form opens and drop the content onto the *Content* property.
- When the project tab is open, drag content onto the *Content* link list property, copy content into it or create new content. All is described in Section 4.6.5, “Editing Link Lists” [201].

# Adding Members to a Project

You can add co-workers to a project or be added by your co-workers. All members of a project find it in their *My Projects* section. In addition, newly added members get a notification.

In order to add members to a project, do the following:

1. Open the project.
2. In the *Members* section, click **[Add Members…]** .

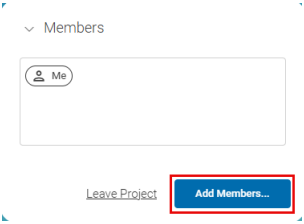


*Figure 4.149. The Members section of the project tab*

3. Enter the name of a group or user with which you want to share the project. You will get suggestions for existing groups and users when you start typing after the third letter. Hit enter to accept the user or group.

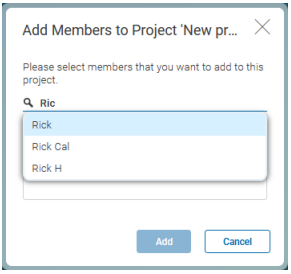


*Figure 4.150. Add Members dialog*

4. If you want to edit a selected group, click the + icon. This expands the group so that you can remove some members from the group.

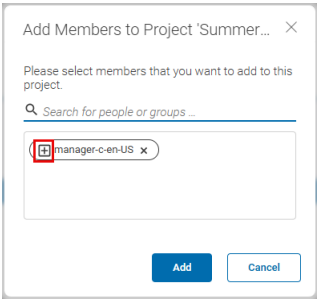


*Figure 4.151. Add members window with selected group*

5. Click **[Add]** to add the selected users to the project.

All selected users will find the project in their *My Projects* section and will get a notification (see Section 2.7, “Notifications” [55]. The users are shown in the project and you can add to-dos to them.

# Removing Members from Project

*Removing members*

Every member of a project can remove other users from this project. To do so, open the *Members* section in the project and click the x icon behind the user name.

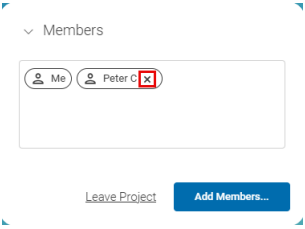


*Figure 4.152. Removing members from a project*

The user will be removed from the project. When a to-do is assigned to the user, you will get a warning. Otherwise, the user will be removed without further notice and the project disappears from the users *My Projects* section.

*Removing yourself*

If you want to remove yourself from the project, click the **[Leave Project]** link in the *Members* section.

When a to-do is assigned to you, you will get a warning. Otherwise, you will be removed without further notice and the project disappears from your *My Projects* section, except when you are the last user in the project. In this case, a dialog opens up where you have to confirm that you want to delete the project.

# Editing To-Dos

An important part of projects are to-dos. In the project tab, you can work with to-dos. This involves the following:

- Creating to-dos
- Adding a description
- Adding editors
- Adding due date
- Marking the to-do as finished

## Creating a To-Do

Simply click the **[Create To-Do]** button in the *To-Do* section of the Project tab.

A new to-do appears and the focus is on the description field. Start writing a description.

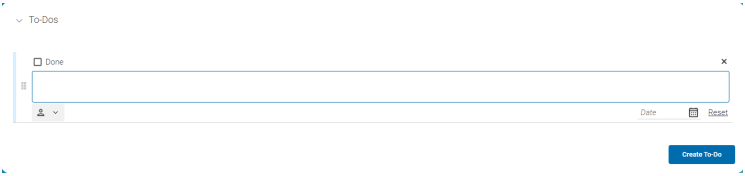


*Figure 4.153. New to-do*

## Adding a User

Select the to-do and click . Select the user from the list. The user gets a notification that you have assigned a to-do.

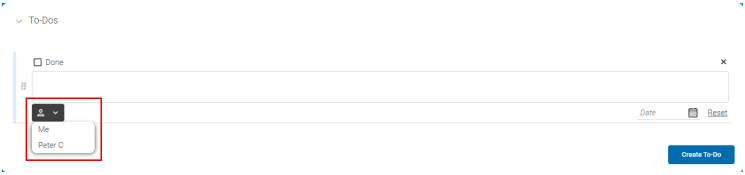


*Figure 4.154. Selecting a user*

## Adding a Due Date

Select the to-do and click the  icon. Select a date from the date picker. The due date is shown in the to-do field and highlighted in the calendar of the project. If the due date lies after the due date of the project, you will see a warning.

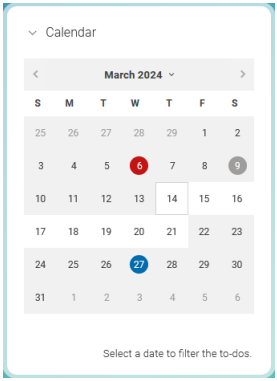


*Figure 4.155. Calendar of a project*

Colors mark different to-dos:

- The light frame highlights the current date
- The blue circle highlights open to-do due dates. When more than one to-do has the same due date, the circle will be blue, as long as at least one of these to-dos is not completed.
- The gray circle highlights done to-dos
- The red circle highlights overdue to-dos
- The white circle highlights the due date of the whole project

## Marking To-Do as Completed

Check the checkbox of the to-do to mark the to-do as completed.

*Figure 4.156. Completed to-do*

The to-do is grayed out and the circle with the due date of the to-do in the calendar is also gray.

## Rearranging To-Dos

You can change the order of to-dos. To do so, hover over the to-do and then drag the to-do with the handle in the left bar to the new position.

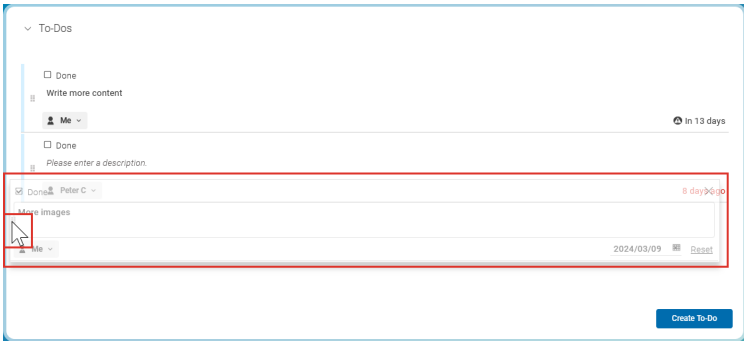


*Figure 4.157. Dragging to-dos*

## Filtering To-Dos

You can limit the shown to-dos to a given date. To do so, click on the according date on the calendar of the project. The circle of the selected date is inverted to mark the selected date. In the filtered view, you can neither create new to-dos nor rearrange the to-dos.

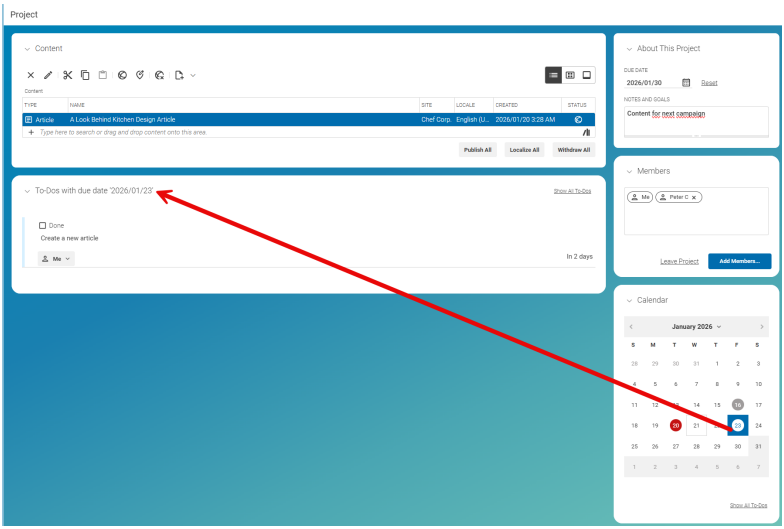


*Figure 4.158. Filtered to-dos*

In order to show all to-dos again, click the **[Show All To-Dos]** link in the *Calendar* of the project.

### Deleting a To-do

Click the x icon at the right side of the to-do in order to delete the to-do.

## 4.7.6.3 Publishing Projects

Publishing a project means that all content items that are assigned to the project will be added to a publication workflow. Projects themselves will not be published.

Two workflow types are available in *CoreMedia Studio*, Direct Publication and Reviewed Publication.

*Direct Publication Workflow*

The Direct Publication Workflow approves and publishes all content items included in the workflow in one step.

*Reviewed Publication Workflow*

The Reviewed Publication Workflow is a workflow that requires interaction between two content editors. One editor starts the workflow while the second editor has to approve the publication. Compared to Direct Publication this workflow is more secure because two persons are verifying the publication set.

In order to publish a project, you have several options:

1. Click the **[Publish All]** button in the *Projects* window.

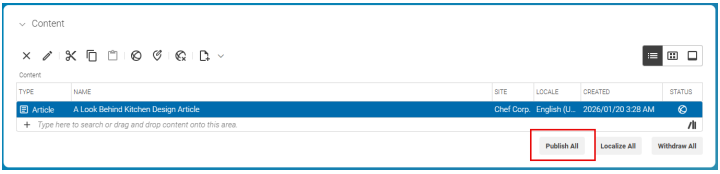


*Figure 4.159. Publish all in the Project window*

or

1. Right-click the project and select **Start publication workflow** from the context menu. You can also publish a project by drag and drop - drag the project and drop it onto the Publication Workflows panel.

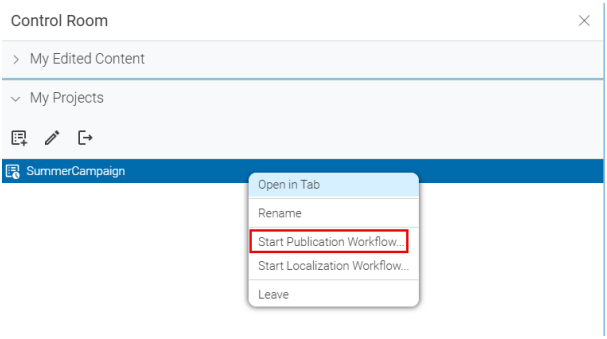


*Figure 4.160. Start publication workflow context menu*

or

1. Alternatively, you can select content items in the *Content* link list of the project tab and start a publication workflow for these items.

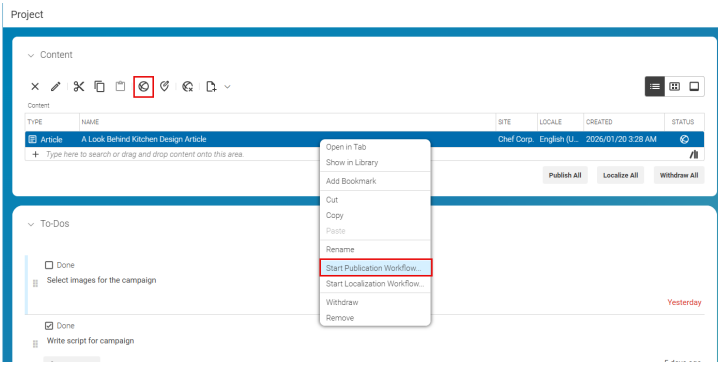


*Figure 4.161. Publish selected items*

Now, you can proceed as described in Section 4.7.2, “Publishing Content” [247].

## 4.7.6.4 Localizing a Project

Localizing a project means, that all content items that are assigned to the project will be added to a translation or synchronization workflow.

You have several options to start a localization workflow.

- Simply click the **[Localize all]** button in the *Project* window.

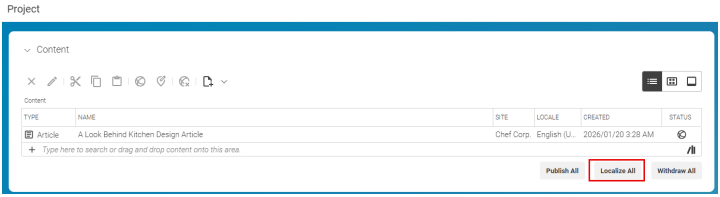


*Figure 4.162. Localize all*

- Start a localization workflow for a project from the Control Room. Simply right-click the project and select **Start translation workflow** or **Start synchronization workflow** from the context menu, or drag and drop the selected project onto *Localization Workflows* section.
- Select content items in the *Content* link list of the project tab and start a publication workflow for these items.

In all cases, proceed as described in Section 4.7.4, “Translating Content” [261] or Section 4.7.5, “Synchronizing Content” [277].

## 4.7.6.5 Withdrawing a Project

Withdrawing a project means, that all content items that are assigned to the project will be removed from the live site.

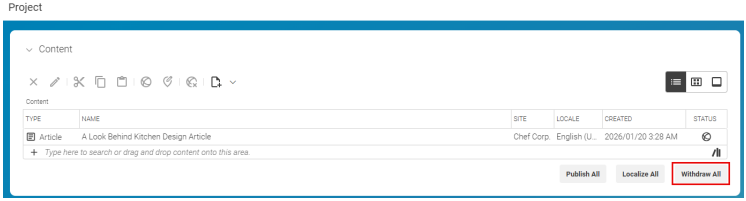


*Figure 4.163. Withdraw all from Project*

You can withdraw a project by simply clicking the **[Withdraw All]** button in the *Content* field of the *Project* tab. If no other published content links to the content of the project, the withdrawal succeeds. Otherwise, you have to add the missing linking content to the project or remove the links from the linking content.

# 4.7.6.6 Showing Project in Control Room

You can easily open the Control Room with the open project highlighted in the *My Projects*-list. Right click the title of the project tab and select **Show in Control Room** from the context menu.

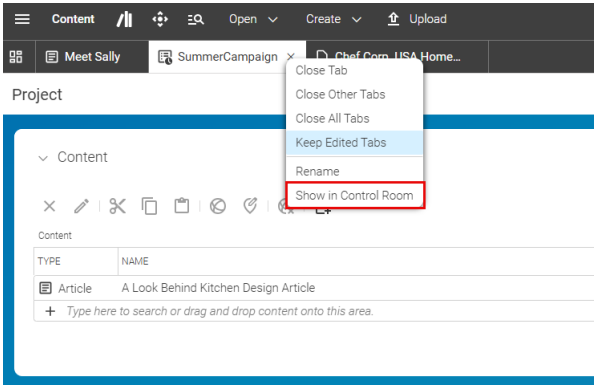


*Figure 4.164. Context menu of the project tab*

# 4.7.6.7 Deleting Projects

A project is automatically deleted, when the last member leaves the project. So, in order to delete a project, remove all other users from the project as described in Section “Removing Members from Project” [289] and finally remove yourself from the project.

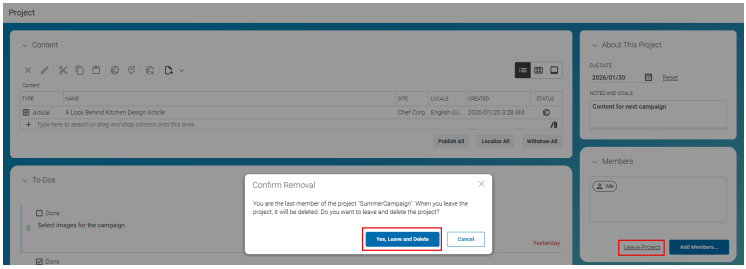


*Figure 4.165. Deletion of a project*

Confirm the dialog and the project is deleted.

# 4.7.7 Getting Keyword Recommendations

You can use the *CoreMedia Feedback Hub* (Section 2.4.1.8, "Feedback Hub for Content Fields" [41]) to get feedback for CoreMedia content from an external system. By default, an integration of the Imagga image recognition service (see imagga.com) is provided. The service gives you keywords, describing the image. However, your CoreMedia installation might also be connected to other services, which might offer you more feedback to your content. You can also use Kio for this use case (see https://documentation.coremedia.com/features/KIO/).

In the CoreMedia default websites, the keywords are added to the header of the generated HTML pages.

## Adding keywords to content field

In order to get keywords and add them to a picture content, proceed as follows:

1. Open a picture content.
2. Click the icon, to open the Feedback Hub window.
3. Select the *Imagga* tab.

   You will get keywords in the *Suggested Keywords* field. The percentage shows the reliability of the suggested keyword.

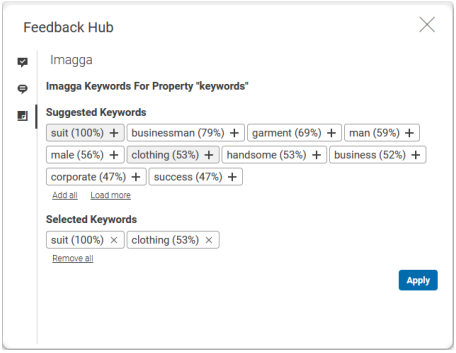


*Figure 4.166. Feedback Hub Window with keywords from Imagga system*

4. Select single keywords by selecting the plus icon or all by selecting **[Add all]** . The selected keywords appear in the *Selected Keywords* field.

5. If you want, you can get more keywords by selecting **[Load more]**, but be aware that all new keywords will have a lower probability to correctly describe the image.
6. Select **[Apply]** to copy the keywords into the configured property of your content.

The selected keywords have been added to your content.

When an error occurs during a feedback request, then the corresponding error message will appear in a red status panel within the Feedback Hub window.

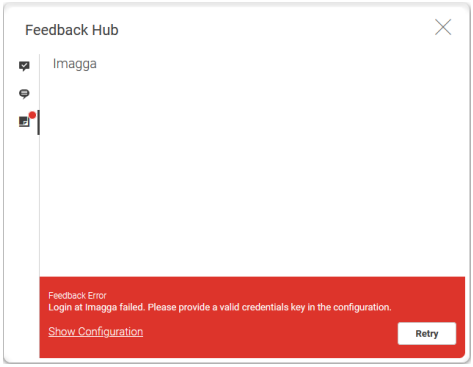


*Figure 4.167. Nagbar showing Error during the loading of keywords*

# 4.7.8 Checking Content in External Preview

*CoreMedia Blueprint* offers a default template set that supports responsive design. That is, your website appears on different devices (PC, Tablet, cellular phone...) in a layout that is appropriate for the device. In order to check the appearance on specific devices, or open the Preview in another browser, you can use the external preview.

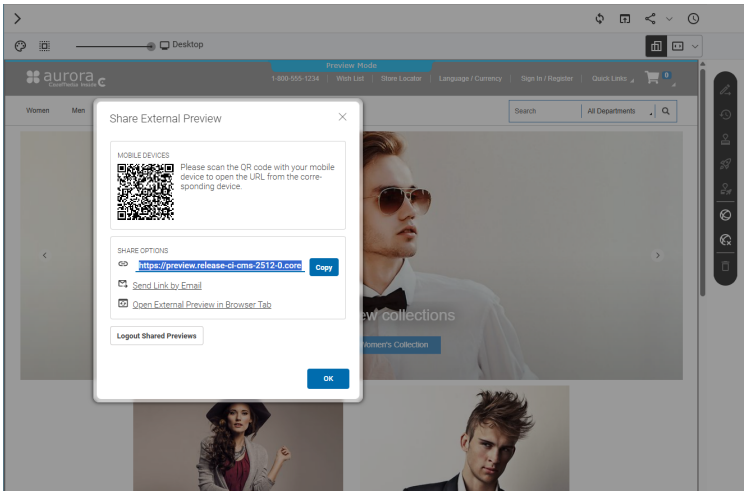


*Figure 4.168. Preview dialog*

*Open external preview*

1. Click the icon and select the **Share External Preview** item.

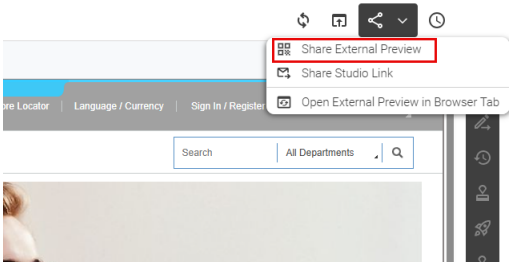


*Figure 4.169. External Preview menu*

2. A dialog opens up as shown in Figure 4.168, “Preview dialog” [299]. Click on **[Open External Preview in Browser Tab]** to preview the current content in a new browser tab. Alternatively, scan the given QR code to open the external preview on mobile devices. You can also copy the link by clicking **[Copy]** or send it by mail by clicking *Send Link by Email*.

Now, the browser or external device shows the preview of the active content item in the Form.

### Logout Connected Previews

You can log out the connected previews by simply clicking the **[Logout Shared Previews]** button and confirming the warning message.

# 4.7.9 Uploading Content to Salesforce Marketing Cloud

NOTE

**CoreMedia Blueprint feature**

*CoreMedia Blueprint* allows you to upload content to Salesforce Marketing Cloud (SFMC). For configured string, richtext or image blob properties of a given content type CoreMedia Studio has an upload button on the Action toolbar.

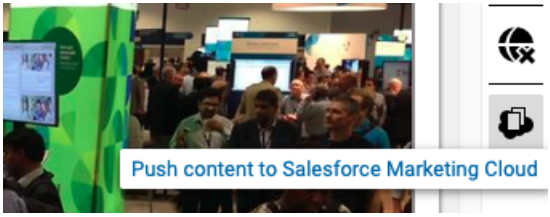


*Figure 4.170. Preview dialog*

*Uploading Content to SFMC*

1. Open the content item of which the content properties should be uploaded to SFMC.
2. Click the upload icon to upload the configured properties of the content.

   The button shows the progress of the upload process, that is the percentage of the already uploaded items to the total number of uploadable items:

*Figure 4.171. Upload progress*

When the upload is completed, the uploaded items can be found on SFMC as assets:

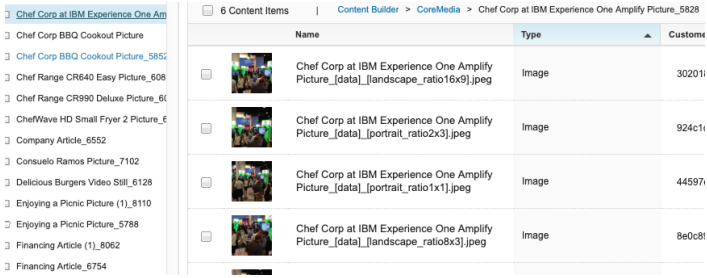


*Figure 4.172. Uploaded assets*

For each uploaded CoreMedia content there is a folder with a name composed of the content name and content ID. In the folder for each uploaded content property there are one or more assets. For an image blob property there is an asset for each of the transformed image crops and the original image. The name of an asset is composed of the content name, property name and - in case of images - the crop name. The uploaded assets can now be used in SFMC, for example as content in a newsletter.

# 4.7.10 Adding Comments on Content Properties

Editors in *CoreMedia Studio* can create comments on certain content properties. To do so, proceed as follows:

1. Open a content form, with property fields that can be commented.
2. Hovering over a commentable property and click on the button (1) on the right side of the form which appears when hovering.

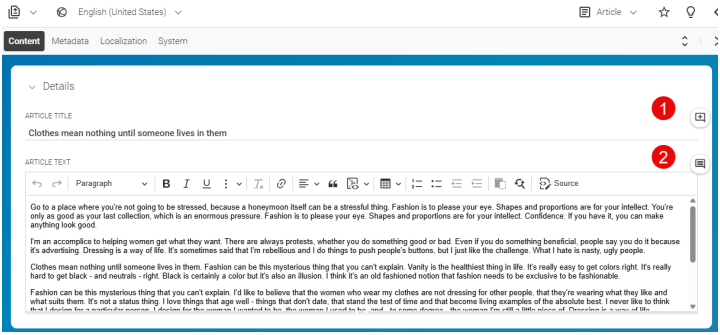


*Figure 4.173. Editorial Comments in the Content Form*

The comment button will always be visible if comments already exist for that specific property field (2).

3. The Feedback Hub window opens with the *Comments* tab selected. The tab shows all already existing comments for each property field of the content item (1).

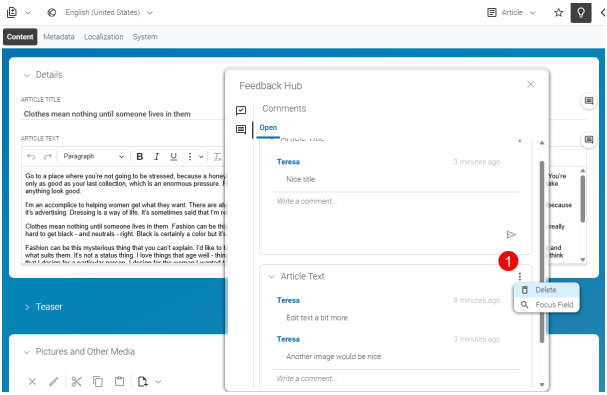


*Figure 4.174. Editorial Comments in the Feedback Hub*

Write your new comment in the *Write a comment ...* field. If you are ready click the small arrow to send your comment.

## Editing Comments

You can edit your own comments or, as an administrator, edit all comments.

1. Hover over the comment, click the icon (1) with the three dots and select **Edit**.

2. Edit the comment in the *Edit Message* field and click **[Save]** when you are done.

## Deleting Comments

You can delete your own comments or complete threads started by you. As an administrator you can delete all comments and threads.

1. Hover over the comment and click the icon (1) with the three dots or select the icon (2) for the whole field. Select **Delete** from the opening menu.
2. Confirm the deletion in the opening dialog by clicking **[Delete]**.

Users who fulfill one of the following rules will receive a notification when a new comment has been created:

- Users who created a comment within the last 30 days.
- Users who contributed to the content within the last 30 days.
- Users who have the commented content in their edited contents.

# 5. Working with Assets

*CoreMedia Advanced Asset Management* allows you to store and manage your digital assets (for example, high-resolution pictures of products) in the CoreMedia system. *CoreMedia Content Cloud* stores the asset in the original format (for example a PSD Photoshop file) together with several renditions for different use cases.

*Definition of a rendition*

A rendition is a derivative of the raw asset, suitable for use in output channels, possibly with some further automated processing. A rendition might be, for example, a cropped and contrast-adjusted image in a standardized file format whereas the original file might be stored in the proprietary format of the image editing software in use. *Blueprint* contains a download portal, where you can comfortably present your assets for download.

An `Asset` content item can not directly be used on your website, except for the download portal. Therefore, you can create a `Picture` or `Video` item from a rendition in an `Asset` item as described in Section 5.3, “Creating Pictures from Assets” [310] and Section 5.4, “Creating Videos from Assets” [312].

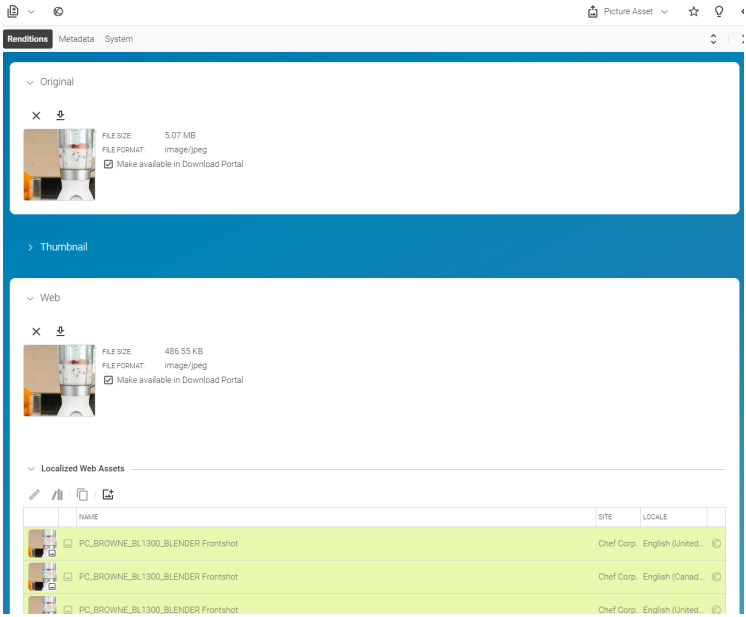


*Figure 5.1. Picture Asset content item*

# 5.1 Extracted Metadata

*CoreMedia Advanced Asset Management* extracts product codes from the IPTC metadata of JPEG pictures uploaded to `Picture Asset` items. You will find them on the *Metadata* tab in the *Product Code* field. If you create a `Picture` item from the asset, the `Picture` item will automatically be linked to the product with the corresponding product code.

NOTE

By default, the CoreMedia system only reads in the *Source inventory number* field of the *Artwork or Object in the Image* section. Your implementation team can extend this by using the `XmpImageMetaDataExtractor` class, and the `ProductIdExtractor` class as a reference from the Blueprint.

*Adding metadata*

A product code that can be read during the upload, has to be placed in the right field of the metadata. To do so, you can use any software that supports setting extended IPTC tags for the XMP standard, such as Photoshop.

Add the product code to the *Source inventory number* field of the *Artwork or Object in the Image* section in the *IPTC Extension* tab (see Figure 5.2, "IPTC metadata setting in Photoshop" [307] for an example with Photoshop). You can add more than one product code to an image.

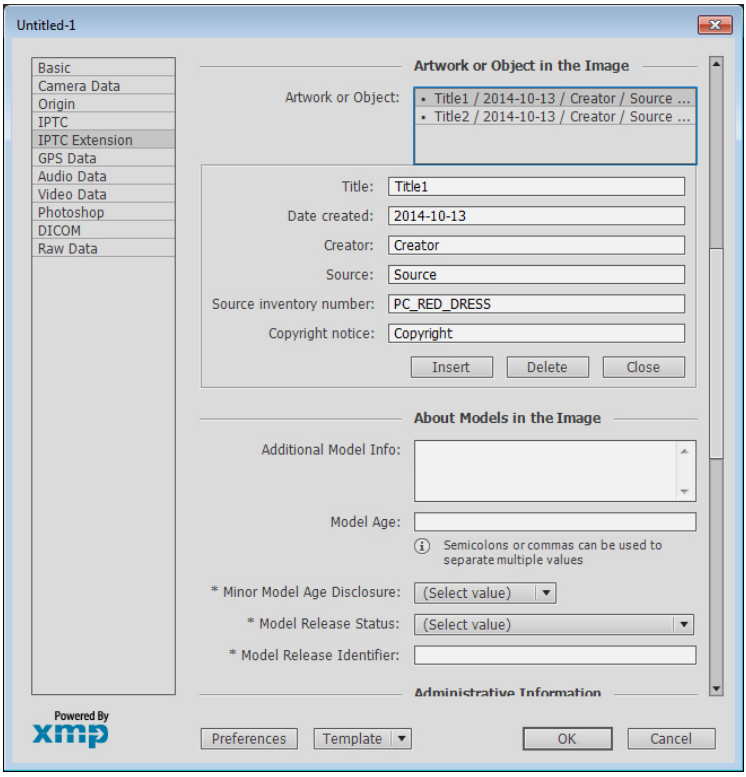


*Figure 5.2. IPTC metadata setting in Photoshop*

# 5.2 Creating Assets in Studio

You create assets in a freely configurable folder structure below the `Assets` folder.

In order to create an `Asset` content item, proceed as follows:

1. Select the folder where you want to create the asset, and create a content item of type `Picture Asset`, `Video Asset` or `Document Asset`.

   The asset opens up and you can start editing.
2. Upload the original image or document and the renditions into the appropriate fields of the *Renditions* tab. The *Thumbnail* property is used for the preview, for instance in the library.

   When your original picture contains a product ID in the XML IPTC metadata (see Section 5.1, “Extracted Metadata” [306] for details), then this ID is added to the metadata of the asset.
3. Enter your rights metadata into the *Rights* section of the *Metadata* tab. This information helps editorial staff to find assets that are licensed for their intended use.

   In addition, the expiration date is used in the download portal to hide assets that are expired. The asset categories are used for the structure in the download portal and for searching. See Section 5.5, “Categorizing Assets” [314] for details.

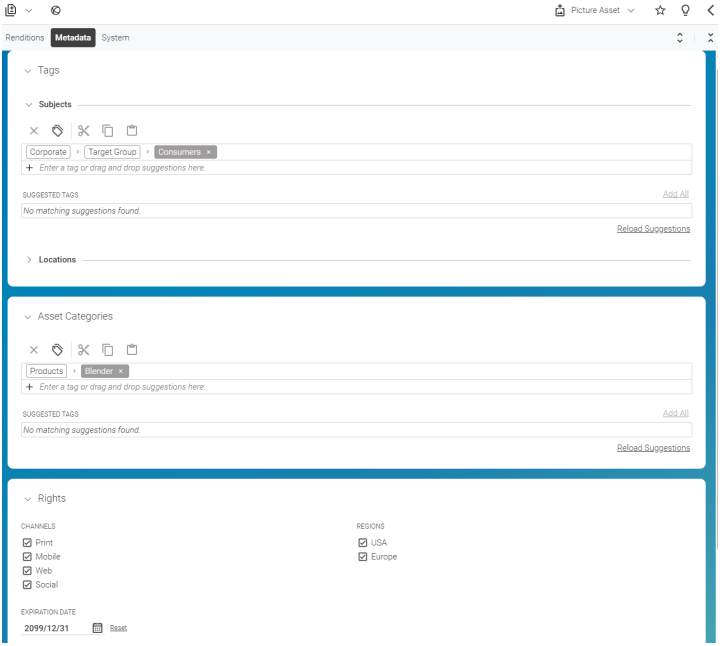


*Figure 5.3. Metadata for Assets*

# 5.3 Creating Pictures from Assets

In order to use a picture asset on your website, you first have to create a `Picture` content item, where you can add information required for presentation on a responsive, localized website.

1. Open the `Picture Asset` item and in the *Renditions* tab, open the collapsed field with the appropriate rendition. For example, *Web* for your website.

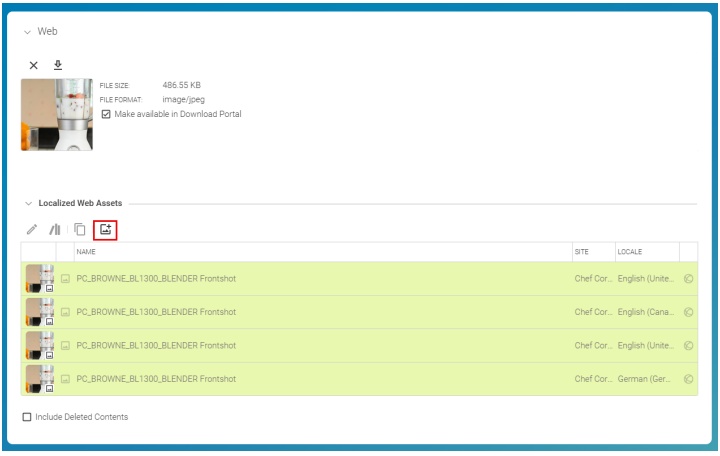


*Figure 5.4. Create picture from asset button*

2. In the *Localized Web Assets* field, click . A dialog opens up.

   If you want, change the name or folder location, then click **[Create]**.

   The newly created `Picture` item opens up and contains the rendition. You can edit it as usual. When the asset contains an expiration date, then this value is inserted into the *Valid to* property of the `Picture` content item. The copyright information from the asset is inserted into the corresponding property of the picture. The asset now shows the new picture in the *Localized Web Assets* field and the `Picture` content links to the asset.

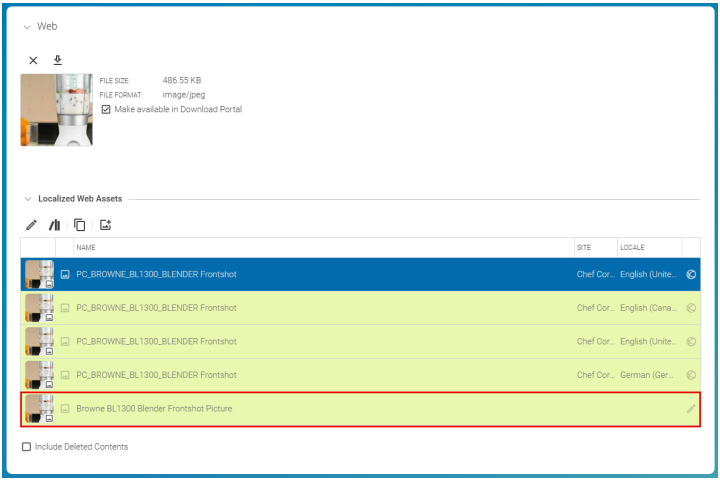


*Figure 5.5. Newly created picture shown in Picture Asset*

**Only for external catalogs:** If the `Picture Asset` item contains a `Product Id` in the *Metadata* field that corresponds to the ID of a product in the catalog, then the picture is automatically assigned to this product.

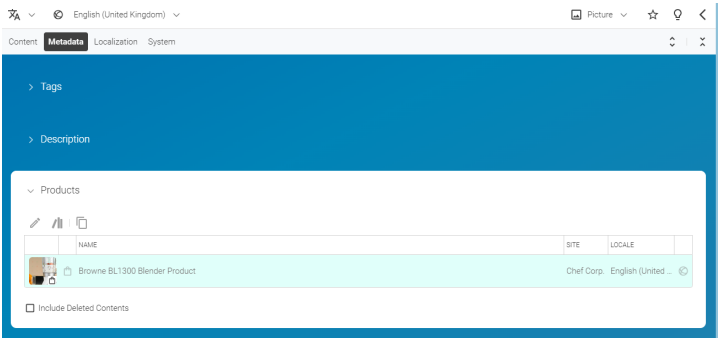


*Figure 5.6. Product linked by picture*

# 5.4 Creating Videos from Assets

In order to use a video asset on your website, you first have to create a `Video` content item, where you can add information required for presentation on a responsive, localized website.

1. Open the `Video Asset` item and in the *Renditions* tab, open the collapsed field with the appropriate rendition. For example, *Web* for your website.

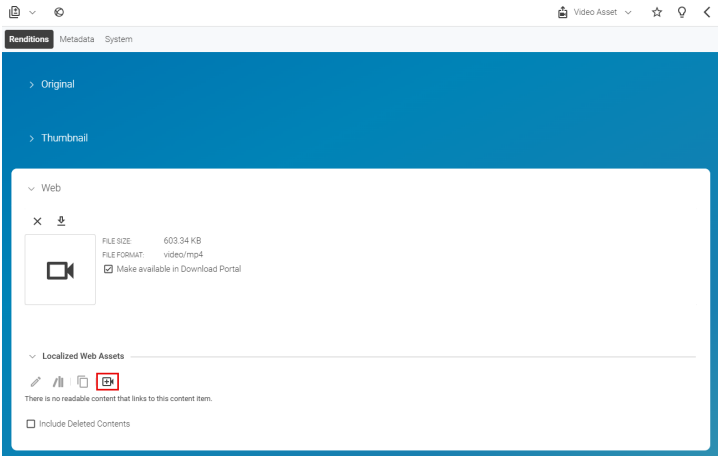


*Figure 5.7. Create video from asset button*

2. In the *Localized Web Assets* field, click . A dialog opens up.

   If you want, change the name or folder location, then click **[Create]** .

   For a video asset, a `Video` item and a `Picture` item are created. The picture contains the thumbnail for the video and is already linked from the *Pictures* field of the `Video` content item. The newly created items open up. You can edit it as usual.

   When the asset contains an expiration date, then this value is inserted into the *Valid to* property of the `Video` content item. The copyright information from the asset is inserted into the corresponding property of the Video. The asset now shows the new Video in the *Localized Web Assets* field and the `Video` content item links to the asset.

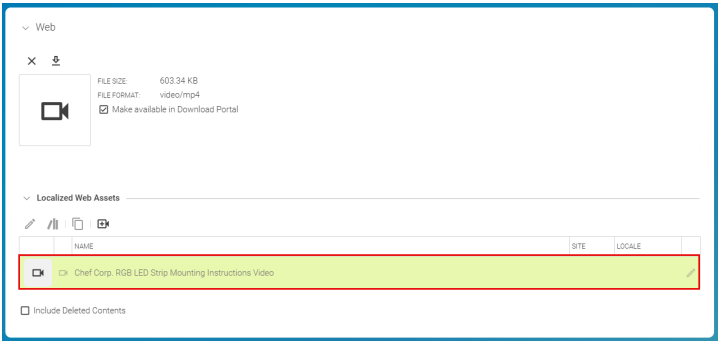


*Figure 5.8. Newly created video shown in Video Asset*

**Only for external catalogs:** If the `Video Asset` item contains a `Product Id` in the *Product Codes* field of the *Metadata* tab and the ID corresponds to the ID of a product in the catalog, then the picture is automatically assigned to this product.

# 5.5 Categorizing Assets

*CoreMedia Content Cloud* contains a specific taxonomy for assets based on `Asset Category` items. This taxonomy is used to create the download hierarchy in the download portal of *CoreMedia Content Cloud*.

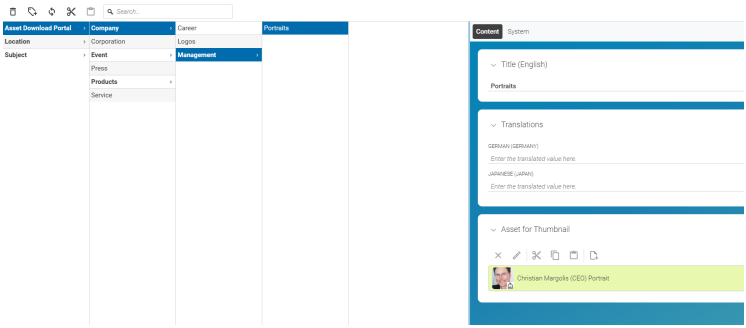


*Figure 5.9. Taxonomy for assets*

The taxonomy items are located in `All Content/Settings/Taxonomies/Asset Download Portal`. You can work with taxonomies as described in Section 4.6.16, “Metadata Management” [238].

## Adding a translation to a category

A category can have a translation for the other supported Studio UI languages. Simply add the tranlsation to the corresponding field.

## Adding an image to a category

A category can have a thumbnail image that is used to represent the category in the download portal. In order to add an image, proceed as follows:

1. Select the category in the taxonomy editor.
2. Drag an `Picture Asset` content with a filled *Thumbnail* property onto the *Asset for Thumbnail* property of the category element.

## Categorizing an asset

You can simply select the category to which an asset belongs in the *Asset Categories* field.

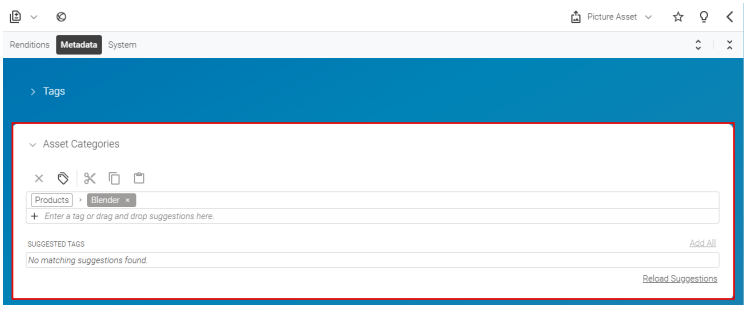


*Figure 5.10. Add category to asset*

You can use the category in searches and it is used to organize the download portal.

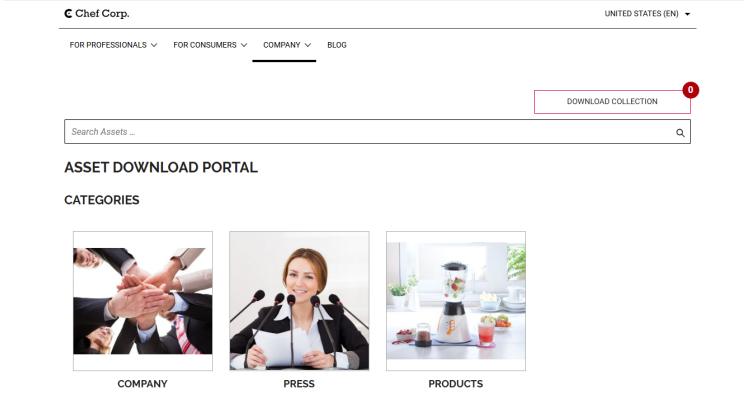


*Figure 5.11. Download portal with Asset*

# 5.6 Searching for Assets

You can search for assets below the `/Assets` folder, like you search for any other content (see Section 4.3, "Locating Content" [129]). However, *Advanced Asset Management* enhances the *Filters* menu (see section "Filtering the results" [134]) in the Library with asset specific filters and removes filters that are not applicable to assets.

| | |
|---|---|
| **Asset Category** | Search for assets that belong to certain asset categories (see Section 5.5, "Categorizing Assets" [314]). |
| **Rights: Channels** | Search for assets for which you have rights for specific channels, such as web or print. |
| **Rights: Regions** | Search for assets for which you have rights for specific regions, such as USA or Europe. |
| **Expiration** | Search for assets for which your rights expire at a given point in time, for example in two weeks. |

NOTE

Keep in mind that the filter options for one rights filter are jointly applied. That is, when you filter for channel rights with "web" and "print" selected, you will only get results which have at least rights for both channels.

# 5.7 Publishing Assets

You can publish an `Asset` content item like any other content. However, blobs in an asset might become very large, for example a PSD Photoshop file. Therefore, you can specify which properties of the asset should be published. The only exception is the *Thumbnail* property, which will always be published.

When you publish an asset, then all selected properties are shown in the download portal. To select a property for publication, simply click the *Make available in Download Portal* checkbox. If a property is empty, then no checkbox appears.

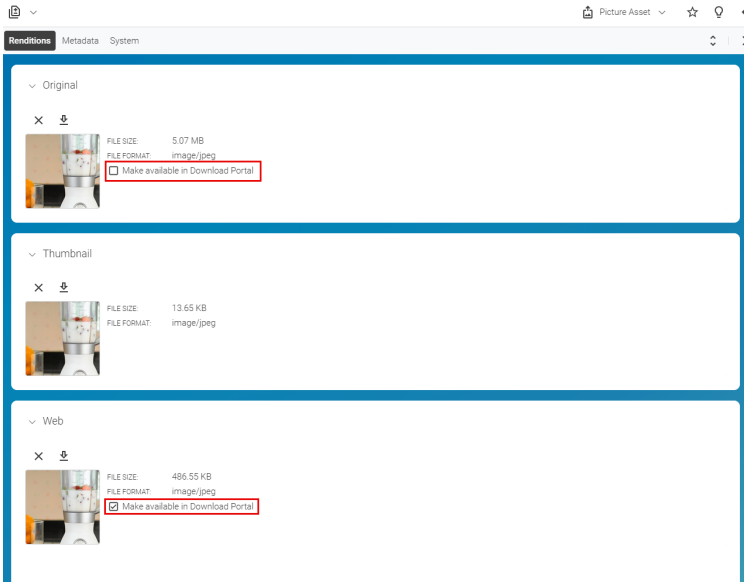


*Figure 5.12. Select property for publication*

# 5.8 Configuring the Asset Download Portal

*CoreMedia Advanced Asset Management* contains a download portal on the website.

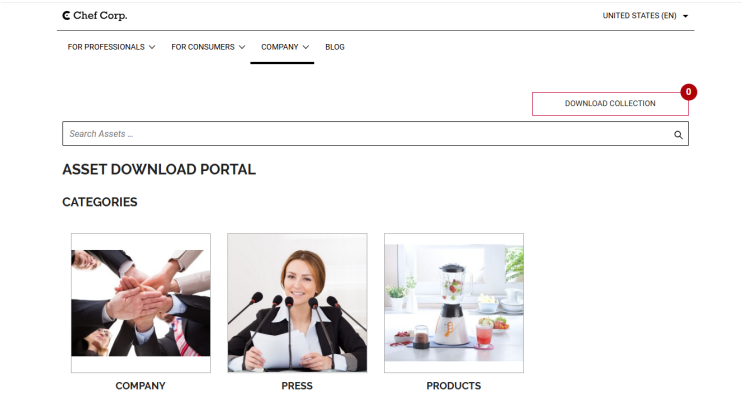


*Figure 5.13. Asset download portal*

You can configure the number of assets that are shown on one page of the portal. Proceed as follows:

1. Open the `Asset Management Configuration` item in *Studio*.
2. In the *Content* tab open the *Settings* field and adapt the `assets-per-page` property.

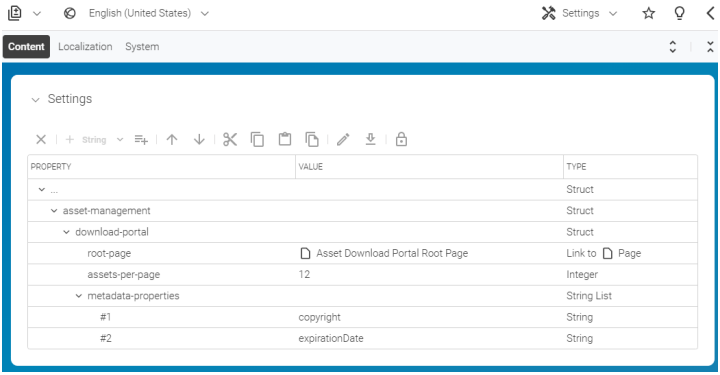


*Figure 5.14. Configuration of the download portal*

3. Save and publish the `Asset Management Configuration` content.

When you reload the preview of the download portal, you will see the new document limit at work.

# 6. Working with Product Catalogs

eCommerce websites are all about selling products. Therefore, they require a connection to a catalog of products. However, a company website might also present the products of the company but without a shop.

The CoreMedia product catalog supports this latter use case with content items of type `Category` and `Product`, see Section 6.1, "Using the CoreMedia Product Catalog" [321].

*CoreMedia Content Cloud* supports both use cases:

- The CoreMedia product catalog based on content items of type `Category` and `Product`, see Section 6.1, "Using the CoreMedia Product Catalog" [321].
- The connection with an eCommerce system and support in Studio with content items of type `Product Teaser`, `Augmented Page`, `Augmented Category`, `Augmented Product` and `e-Marketing Spot`, see Section 6.2, "Working with Commerce Content" [326].

# 6.1 Using the CoreMedia Product Catalog

The CoreMedia product catalog bases on content items of type `Category` and `Product`. The catalog structure is defined by links, where products link to their category and categories link to their sub categories.

By default, the catalog and its content is shown in the tree view of the library as a separate root folder and not below *All Content*. Therefore, you can only search for products and categories below the *Catalog* root folder. You can switch this behavior as described in Section 6.1.6, "CoreMedia Product Catalog Content Mode" [323].

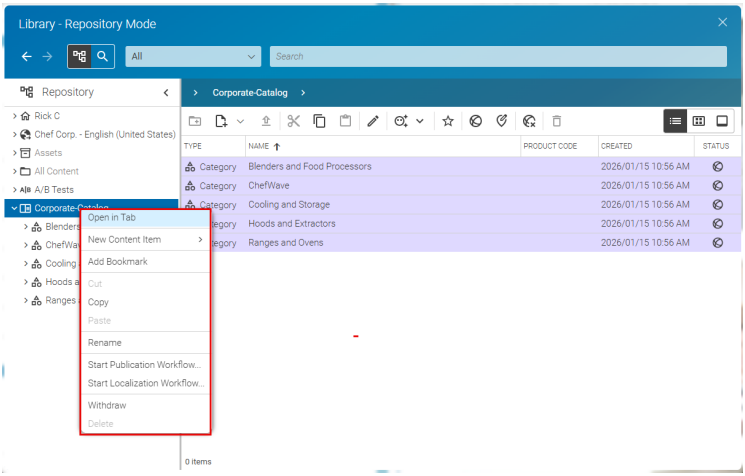


*Figure 6.1. Editing the CoreMedia product catalog*

## 6.1.1 Creating a New Category

Select the parent category of the new category and either click the icon and select **Category** or select **New Content Item|Category** from the context menu.

The new `Category` content will be created and automatically linked to the parent category. The form of the new category opens up. Add at least a *Category Title*. This title is, for example, used in the breadcrumb navigation.

# 6.1.2 Creating a New Product

Select the category to which you want to add the product and click the icon or select **New Content Item|Product** from the context menu. Enter a name and click **[Create]** .

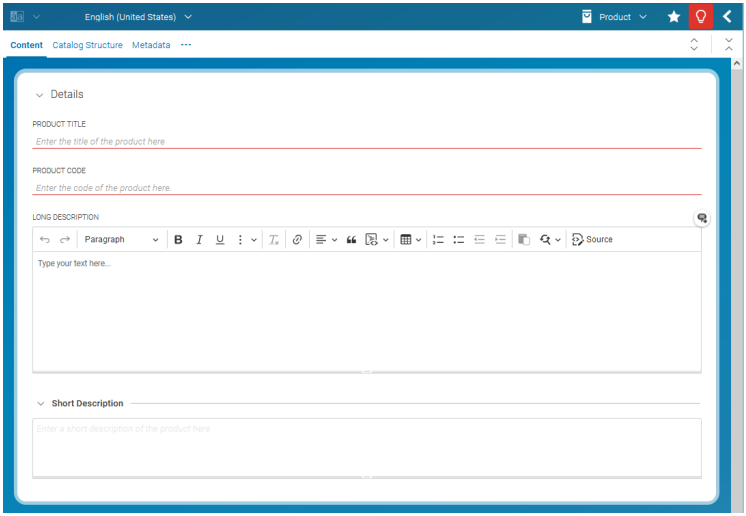


*Figure 6.2. Newly created product*

The new `Product` content will be created and automatically linked to the parent category. The form of the new product opens up. Enter at least a *Product Title* and a unique product ID in *Product Code*.

# 6.1.3 Copying Products

You can copy products to categories. Copying has two meanings; creating an actual copy of the product and link it to the `Category` or only creating a link to the `Product`, so that both `Categories` share the same `Product`.

1. Select the `Product` and select **Copy** from the context menu or click .
2. Select the `Category` to which you want to copy the `Product` and select **Paste** from the context menu. A dialog opens up, where you can select if you want to make an actual copy or only a link.

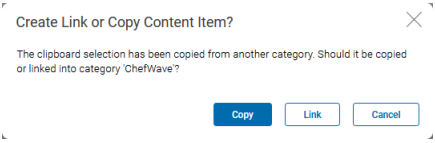


*Figure 6.3. Choose how to copy product*

3. Select the option you want to apply.

Now, you have either created a new product item and linked it to the category or you have only created a link.

## 6.1.4 Editing the Category Hierarchy

You can simply change the hierarchy of `Categories` by dragging a `Category` to a new position in the tree. You have to publish the change so that it becomes visible on the live site.

## 6.1.5 Deleting Products and Categories

Deleting a product or a category is similar to the deletion of other items as described in Section 4.4.3, “Deleting and Restoring Content Items” [159]. However, you cannot delete a category that contains content. You have to delete all contained items before.

## 6.1.6 CoreMedia Product Catalog Content Mode

The CoreMedia product catalog offers the feature to treat the product catalog as regular content in the library content tree instead of the library catalog tree view. This feature is intended to offer privileged user groups advanced control over the product catalog.

## Activating the CoreMedia product catalog content mode

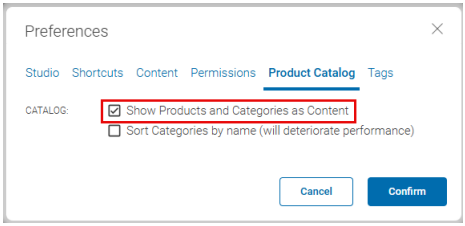


*Figure 6.4. The CoreMedia product catalog preference tab*

In order to change to the product catalog content mode, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. The *Preferences* window opens up. Select the *Product Catalog* tab.
3. Select the *Show Products and Categories as Content* checkbox and click **[Confirm.]**

The product catalog now appears as regular content in the library content tree. The Catalog view is still shown.

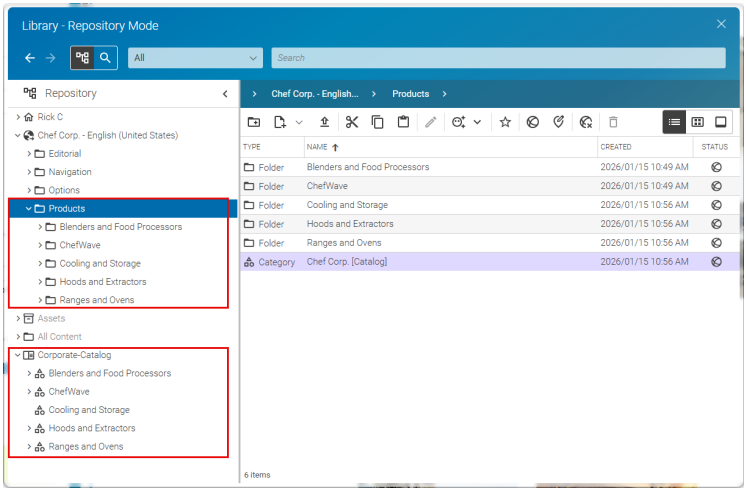


*Figure 6.5. CoreMedia product catalog as content*

## Detecting lost Catalog Items

If you create products and categories only with *Studio* features, they are always interlinked correctly. However, since CMS products and categories are just ordinary content, you can accidentally corrupt the catalog structure with any other CMS client. For this case *Studio* provides a special search filter that detects products which are not assigned to a category and categories which are not part of the catalog tree. You can use the filter only when you search through *All Content* but not when you search in the *Catalog* view.

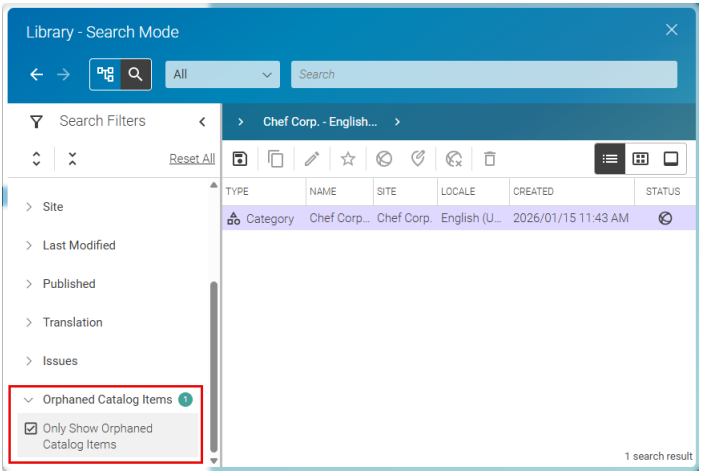


*Figure 6.6. Catalog Lost And Found*

# 6.2 Working with Commerce Content

eCommerce Connector feature

With the help of the eCommerce Connectors, you can integrate *CoreMedia Content Cloud* with eCommerce systems. Therefore, the Library offers direct access to the commerce content.

*Content-led scenario*

You can use the placeholder content types `Product Teaser`, `Product List`, `Augmented Category`, `Augmented Product` and `Augmented Page` to add eCommerce content to the sites managed in *CoreMedia Content Cloud*. These content items hold a link to the corresponding commerce content. Changes in the commerce system are immediately visible in the CMS.

*Connector for HCL Commerce specific*

With the *Connector for HCL Commerce* you also have the `e-Marketing Spot` content type and you can use commerce segments in personalized content as described in Chapter 7, *Working with Personalized Content* [368].

*Commerce-led scenario*

In the opposite direction, you can add content from the CMS system into sites created by the commerce system.

The following sections describe how you access commerce content in *Studio* and how you work with commerce content types in order to include content from your commerce system into your site (Content-led scenario) or the opposite direction (Commerce-led scenario or fragment approach).

| Icon | Name |
|---|---|
| | Augment a category or product from the commerce system |
| | Create a product teaser for the selected commerce product |
| | *Connector for HCL Commerce* specific<br>Create an e-Marketing Spot for the selected commerce e-Marketing Spot |
| | Search product variants (SKU) for the selected product |

| Icon | Name |
| --- | --- |
| | Search product images for the selected product |
| | Show product lists from a category filtered by some properties |

*Table 6.1. Icons for working with commerce*

# 6.2.1 Accessing Commerce Content in Studio

This section describes how you access content from the commerce system in *CoreMedia Studio*.

## 6.2.1.1 Catalog View

When you have selected a site with a connected eCommerce system, you will see the eCommerce content in the tree of the Library. When you use the *Connector for HCL Commerce* and you have configured support for multiple catalogs, you will see all catalogs.

You can use the standard Library functionality (see Section 2.4.1.6, “Library” [38]) to browse through the eCommerce content, search for items or add products to a `Product Teaser` content type, for instance. Only the filters are not applicable.

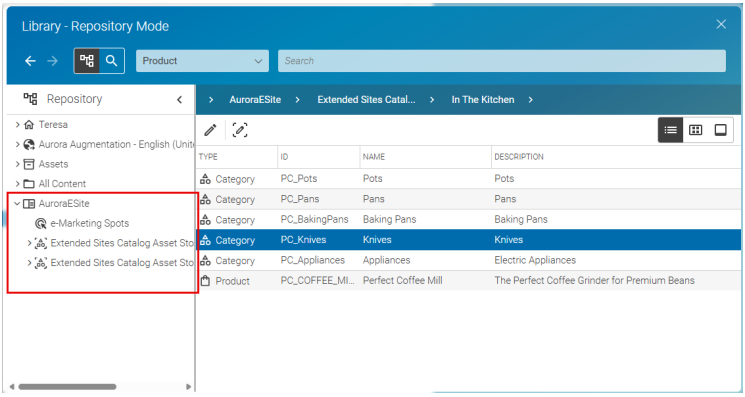


*Figure 6.7. eCommerce content in Library*

In this view, you can browse through the catalogs as you can browse through the CMS content. You can even open a commerce product as a read-only content in *Studio* with a double-click or create an `Augmented Category` or `Augmented Product` (see Section 6.2.2.3, "Adding eCommerce Category" [336].

### *Connector for HCL Commerce* specific feature

When you have multiple catalogs and you search below the complete commerce site (below AuroraESite, for example), you will only find content from the default catalog! In order to find content from other catalogs you have to select the catalog folder and search below this folder.

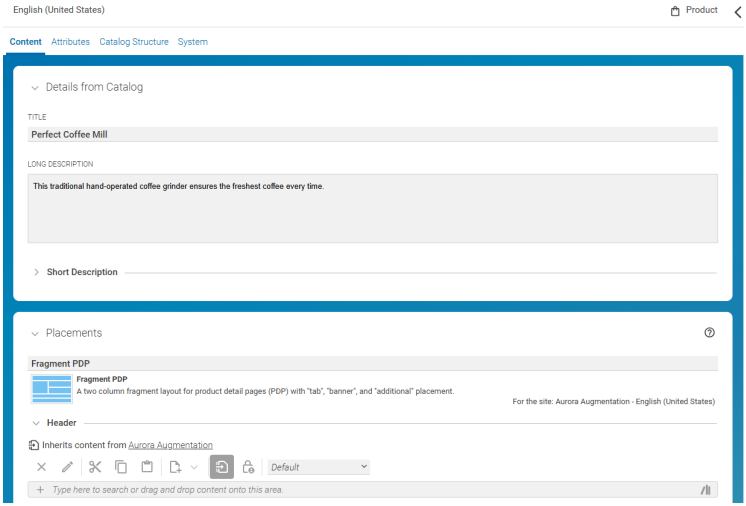


*Figure 6.8. Commerce product opened in Studio*

## 6.2.1.2 Searching for Commerce Items

You can search for commerce items, such as products or categories, like you search for content items. Simply select the content type and enter some search text. See Section 4.3.6, "Navigating in the Library" [138] for details.

### Differences to Content Search

You can not use the common filters of the Library for commerce search, but commerce-specific filters. When you search for categories, you have to be in the root of the commerce catalog.

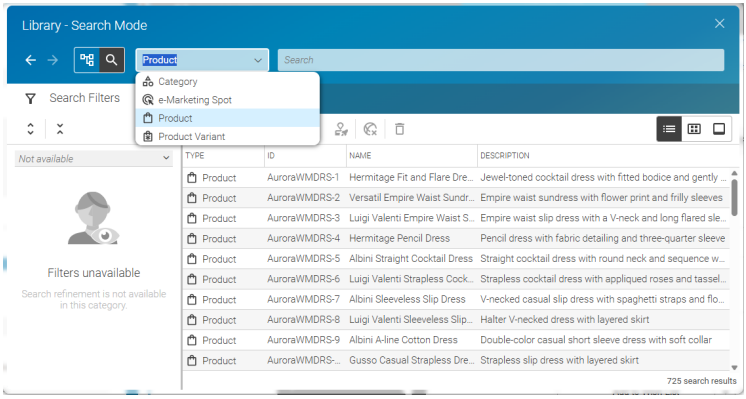


*Figure 6.9. Search for product*

## 6.2.1.3 Searching for Product Variants

You can search for product variants (SKUs) of a given product. Simply select the product and click *Search Product Variants* in the context menu or the icon in the toolbar.

The results are shown in the Library.

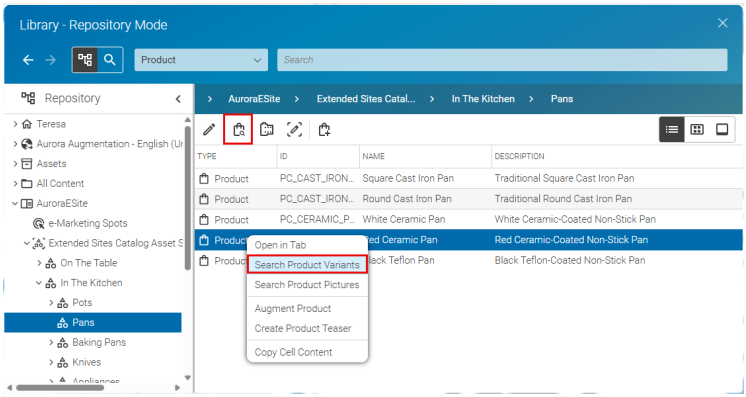


*Figure 6.10. Search for product variants*

# 6.2.1.4 Searching for Product Pictures

When you have mapped pictures from the CoreMedia system to products and product variants (see Section 6.2.3.9, “Replacing Commerce Images in Products and SKUs with CMS Images” [358], then you can search for the pictures assigned to a given product. Simply select the product and click *Search Product Pictures* in the context menu or the icon in the toolbar.

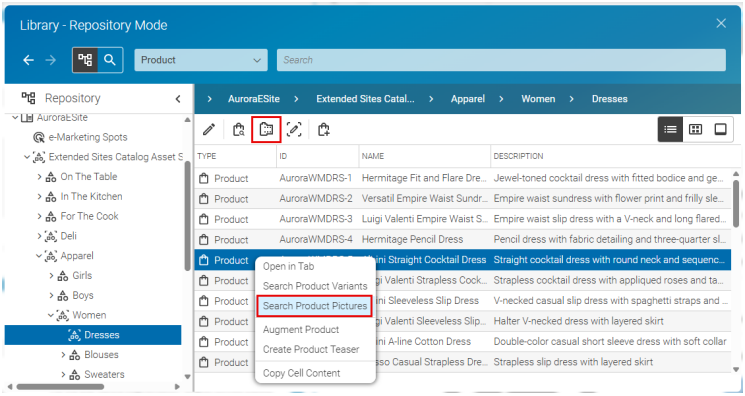


*Figure 6.11. Search picture content items assigned to a product*

In the result, you will find the `Picture` items that links to the product.

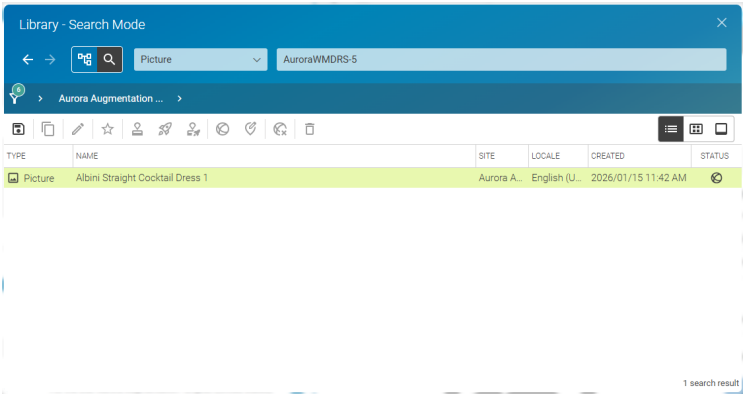


*Figure 6.12. Found picture content items assigned to a product*

# 6.2.2 Adding Commerce Content to CMS Pages

This section describes how you can add content from the commerce system to CoreMedia CMS sites.

## 6.2.2.1 Adding a Product Teaser

You can add teasers to your site which link to your eCommerce products, using the `Product Teaser` content type. By default, the teaser text and image is taken from the eCommerce content, but you can overwrite this with your own content.

### Creating a Product Teaser

To create a new product teaser, do as follows:

1. Select a product in the Product view of the Library.
2. Right-click the product and select **Create Product Teaser** from the context menu or click the *Create Product Teaser* icon in the toolbar. The *New Product Teaser* dialog opens up. Here you can change name and folder.

   A new `Product Teaser` content item opens up. The product is already linked in the `Product` property and the teaser title and teaser text are taken from the eCommerce product.

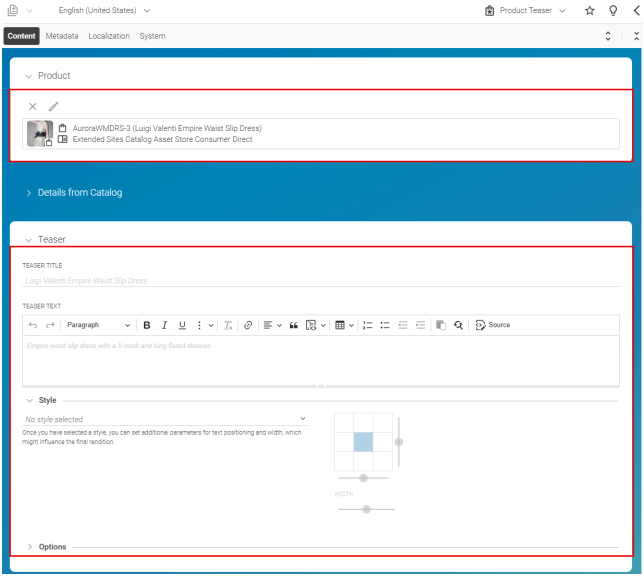


*Figure 6.13. New product teaser*

3. You will most likely overwrite the teaser texts with a more engaging description. Simply start typing in *Teaser Title* and *Teaser Text* fields.
4. In the *Shopping-Cart Shortcuts for Product Teasers* select if you want to show a *Shop Now* button, which opens an overlay for buying, on the teaser (*Display Buttons and Detail Preview*) or not (*Do Not Display Cart Functionality*). By default, the settings are taken from the page in which the teaser is used (*Inherit from Page*).
5. You can also overwrite the product image that is by default taken from eCommerce. Add a picture to the *Pictures* field which is simply a link list field for `Picture` items (see Section 4.6.5, “Editing Link Lists” [201] for details).
6. Save your changes.
7. Add the product teaser to your site.

The site will show now the product teaser with your adapted description and image.

# 6.2.2.2 Adding a Product List

You can add a list of eCommerce products to your site, using the `Product List` content type and add CMS content to fixed positions of the list. So you might, for example, show a list of kitchen products and add an article about cooking to the list.

## Creating a Product List

To create a new product list, do as follows:

1. Create a new content of type `Product List`

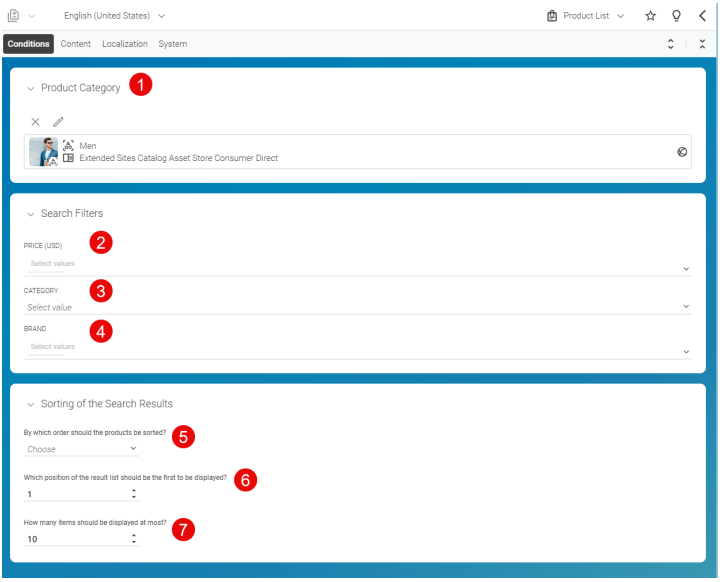


*Figure 6.14. Example of a product list*

2. Define the product list by adding the appropriate values to the following fields in the *Conditions* tab:

| Field name | Default | Description |
|---|---|---|
| Product Category (1) | - | The category from which the products should be taken. Drag a `Category` from the Library on the field. |

| Field name | Default | Description |
|---|---|---|
| Filter Facets (2, 3, 4) | - | Depending on the selected category, filter facets and values for a refined search are shown here. Please note that for older product list content items a validation error might raise which prompts a message to re-assign a previously selected value. This re-assignment ensures that the data is stored in a new format that does not contain localized values anymore and supports multiple facets. |
| By which order should the products be sorted? (5) | Price ascending | The sorting order. You can choose between "Price ascending" and "Price descending". |
| Which position of the result list should be the first to be displayed? (6) | 1 | At which position of the result list should the display start. |
| How many products should be displayed at most? (7) | 10 | The number of products to be shown. If there are fewer results in the list, then all results are shown. |

*Table 6.2. Fields of product list*

3. In the *Content* tab, you can add CMS content to the *Items with Fixed Position* field (Articles, for example) that are displayed at the position, defined in the *Fixed Position* field.

   Drag one or more content items on the *Items with Fixed Position* field. Then click the small arrow (1) in order to open the field and select the position of the item in the *Fixed Position* field. The item will not be shown when you enter no position.

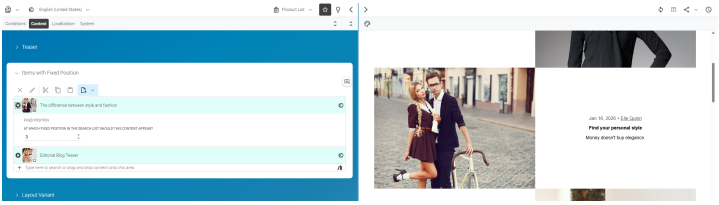

*Figure 6.15. CMS content in product list*

4. Save your changes.
5. Add the product list to your site.

The site will show now the product list and if you added an item to a specific position you will see the item at this position.

## 6.2.2.3 Adding eCommerce Category

In order to add a category to your CMS site, you have to augment the eCommerce catalog category. The `Augmented Category` content is automatically stored below the `Augmentation` folder in your site folder. The icon of the eCommerce catalog category in the `Product Catalog` in the Library changes in order to indicate the augmentation.

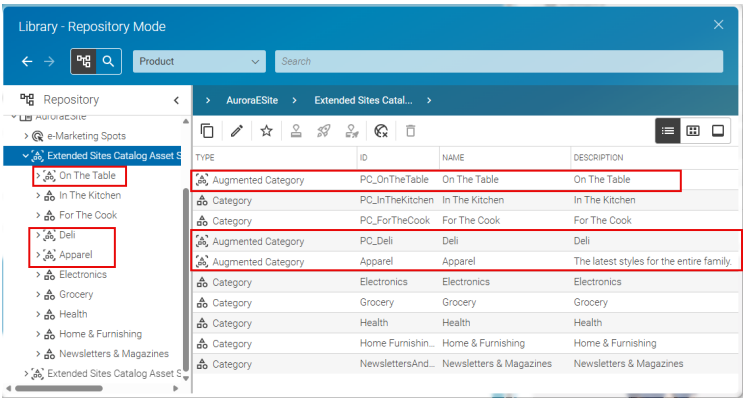


*Figure 6.16. Augmented categories in the tree view of the Library with specific icon*

> **NOTE**
>
> By default, `Augmented Category` items are hidden in the content part of the Library. They are only shown in the `Product Catalog`. To find the augmented categories in the content, select *Show Products and Categories as Content* in the *Preferences* window.

1. From the Library select the category in the eCommerce tree and select *Augment Category* from the context menu.

   The `Augmented Category` content item is automatically created.

2. Link the new augmented category to the parent `Page` content item. To do so, drag the augmented category item into the *Navigation Children* field in the *Navigation* tab of the parent `Page` content item.

Select the parent Page in the Form view, and you will see the new navigation node in the preview.

## 6.2.2.4 Adding an e-Marketing Spot

*Connector for HCL Commerce* specific feature

You can add an e-Marketing Spot from *HCL Commerce* into *CoreMedia Content Cloud* and add it to your site. Proceed as follows:

1. Select in the Library the e-Marketing spot you want to add.
2. Click the *Create e-Marketing spot* icon in the toolbar of the Library or select it from the context menu.

   A dialog opens up.

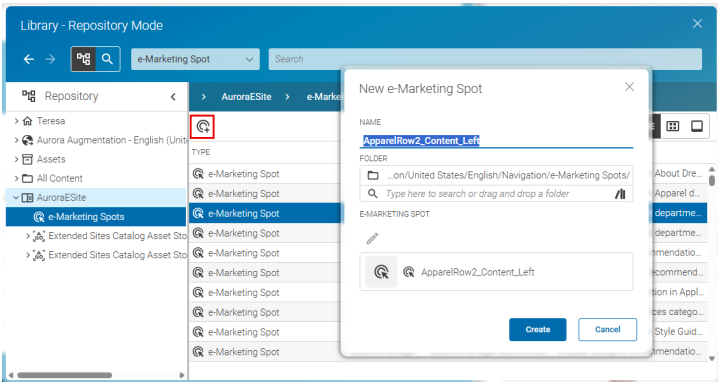


*Figure 6.17. Creating an e-Marketing spot*

3. Enter a name for the content item and, if necessary, adapt the folder where the content item should be created.
4. Click **[OK]** .

   The e-Marketing spot has been created and is opened in the Form view.

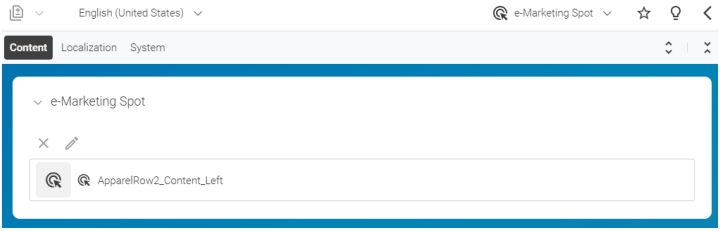


*Figure 6.18. Newly created e-Marketing spot*

5. Drag and drop the new e-Marketing Spot into the *Content* section of a page.

# 6.2.3 Adding CMS Content to Your Shop

If your *CoreMedia Content Cloud* site is connected with the commerce system, then you can add content from the CoreMedia system to specific locations of commerce shop pages. There are the following different methods:

- Adding content via the CoreMedia Content Widget

  Allows you, to add content items to commerce pages.

- *Connector for HCL Commerce* specific

  Adding content to a product via the CoreMedia Asset Widget

  Allows you, to add pictures, videos and downloads to product pages.

- Replacing images for products

  Allows you, to replace the default product image from the commerce system with images from CoreMedia.

- Adding editorial pages

  Allows you, to add linked editorial pages to the commerce system. These pages do not appear in the navigation but can be reached via teasers.

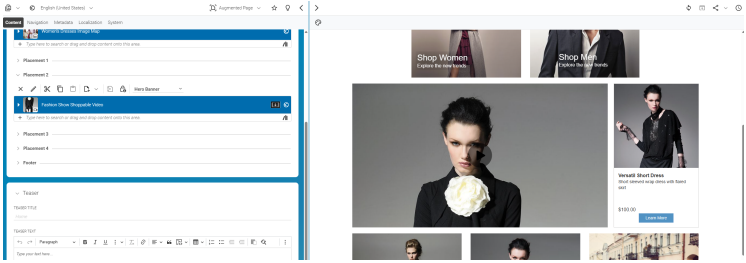


*Figure 6.19. Commerce website with CMS content*

## 6.2.3.1 Search Path for CMS Content for the Content Widget

Adding the *CoreMedia Content Widget* to a slot of a layout managed by the commerce system as described in Section 6.2.3.2, "Adding CoreMedia Content Widget to Commerce System" [341] is the main way to get content from the CMS into pages delivered by the commerce system.

In general, you can define content at the following positions:

- Content for specific commerce categories. This content is used for the category and all of its subcategories for which you have not defined more specific content. You might, for example, define common content for all apparel categories but define more specific content for the Women Handbags category. This is described in Section 6.2.3.4, "Adding Category Specific Content" [348]
- Specific content for product detail pages of a certain category and all of its subcategories for which you have not defined more specific content. This is described in Section 6.2.3.5, "Adding Specific Content for Product Detail Pages (PDP)" [350].
- Specific content for pages in your store that are not catalog pages, for example, the homepage, search pages or others. This is described in Section 6.2.3.6, "Adding Content to Other Pages" [353]
- Default content for all commerce categories, product detail pages and others for which you have not defined more specific content. Normally, this page will be created only once by a technical editor. How to define default content is described in Section 6.2.3.3, "Adding Default Content for Categories and Product Detail Pages" [347].
- Separate pages, that contain the header and footer of the commerce system, but only show CoreMedia content in the main part of the page. These pages

are not part of the current section, see Section 6.2.3.7, “Adding CMS Pages or Articles to the Commerce System” [355] for details.

The content that is shown in the slot is taken from specific `Augmented Pages`, `Augmented Categories` or `Augmented Product` items in your site hierarchy. These pages must have a placement in the *Content* or *Product Content* tab that matches with the placement defined in the *CoreMedia Content Widget*. To make editing easy, the page grid of these pages will correspond to the layout of your catalog page (depends on your system configuration).

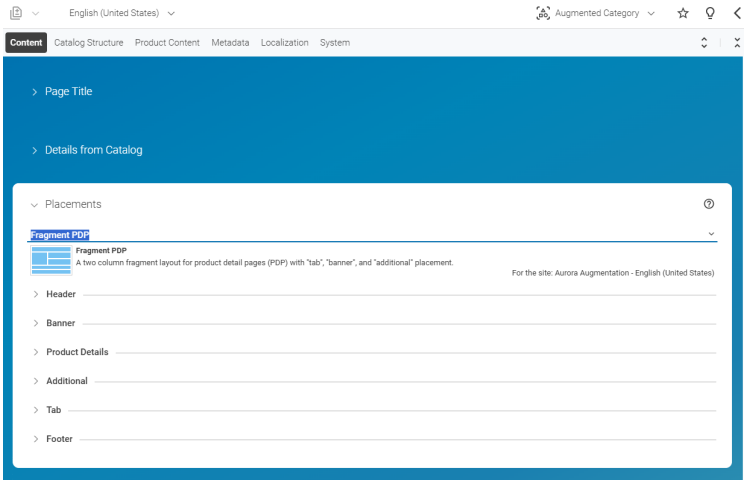


*Figure 6.20. Example of a page with a page grid for fragment use. The placements that corresponds to the commerce layout are highlighted in blue and are the only ones that can be edited.*

The following list shows how the CoreMedia system determines the placement the content of which should be inserted into a commerce category overview page. The search is done hierarchically along categories of the commerce system's category tree.

1. Select the `Augmented Page` that is connected with the store. This is the site root page.
2. In this site, find an `Augmented Category` content item for the requested category.
   a. If there is no `Augmented Category` for the requested category, search the parent categories upwards until you find an `Augmented Category`.
   b. If there is no `Augmented Category` at all, take the Catalog root *Augmented Page*.

3. Now, an `Augmented Category` content item has been found. The augmenting content is taken from a placement in the page grid, that corresponds to the placement name, defined in the *Content Widget*.
4. If the placement does not exist, the `Augmented Page` site root is taken and the content from the corresponding placement is taken.

Figure 6.21, "Decision diagram" [341] shows this process in more detail.

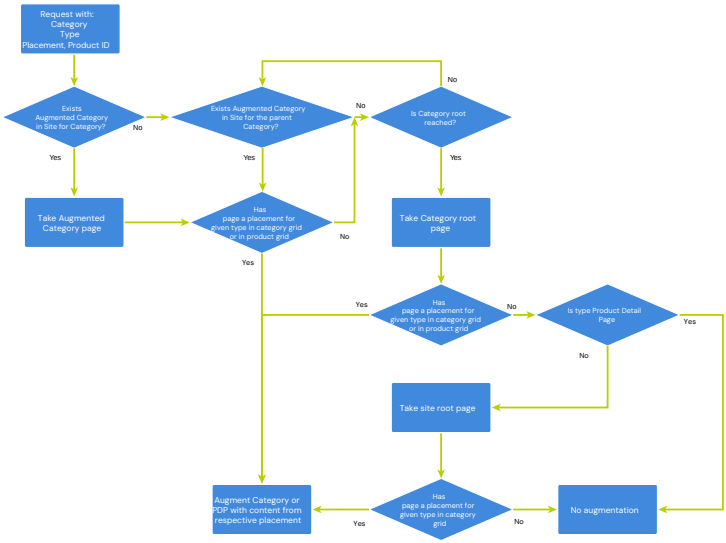


*Figure 6.21. Decision diagram*

## 6.2.3.2 Adding CoreMedia Content Widget to Commerce System

The *CoreMedia Content Widget* is deployed into pages of the commerce system. There, it shows content delivered by the CMS system in pages delivered by the commerce system. You can use two approaches:

- Use the widget to include content in existing pages, for example, product detail pages or categories
- *Connector for HCL Commerce* specific feature

Create two new pages in the *HCL Commerce* system that show content completely delivered by the CMS but with header and footer from the commerce system. For micro sites or complete articles, for instance.

- *Connector for SAP Commerce Cloud* specific feature

  Create a new page in the SAP Hybris system that show content completely delivered by the CMS but with header and footer from the commerce system. For complete articles, for instance.

## Adding Widget to Existing Pages

In order to connect a slot of a commerce layout with the CoreMedia system, proceed as follows.

1. Open the layout/slot as described in the list, depending on your eCommerce system:
   - In the *Commerce Composer* of the *HCL Management Center for WebSphere Commerce*
   - In the *WCMS Cockpit* for SAP Commerce.
   - In the *Salesforce Commerce Business Manager* for Salesforce Commerce Cloud
2. Set the *Content Type* field to "Content Asset" and enter `slots/content/coremedia-content-widget-isml` into the *Template* field.

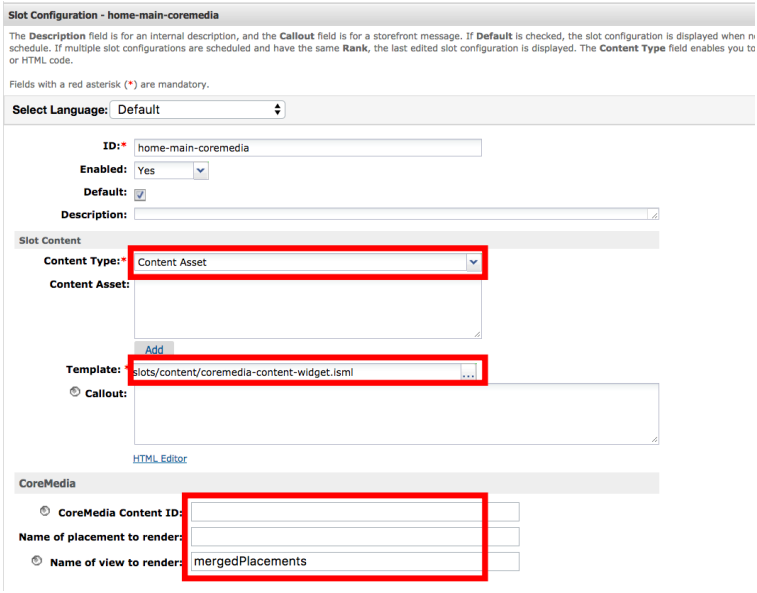


*Figure 6.22. Add widget to slot in Salesforce*

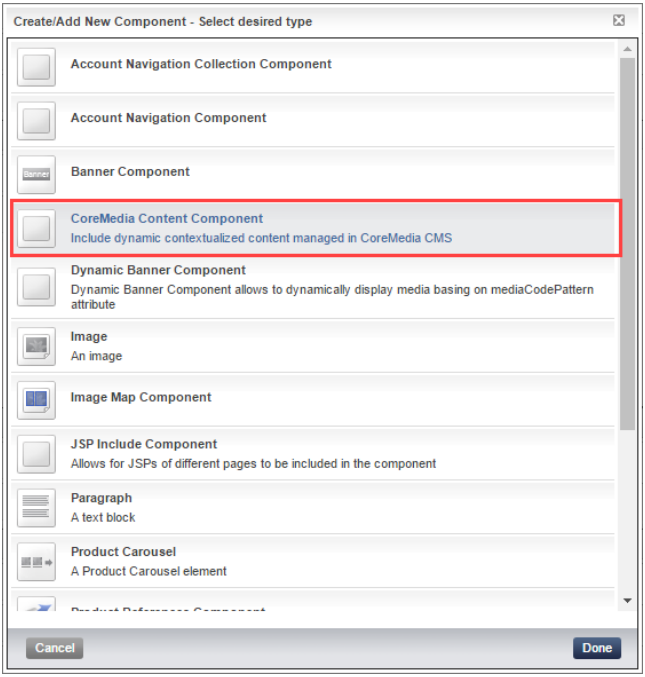


*Figure 6.23. Add widget to slot in SAP Commerce*

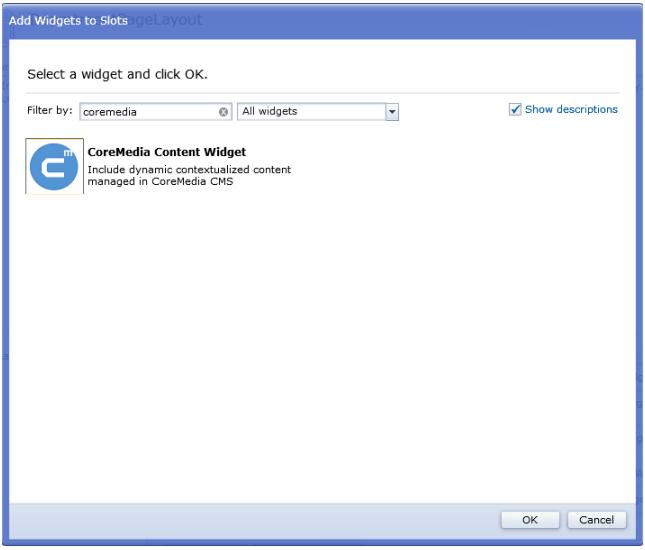


*Figure 6.24. Add widget to Slot in Connector for HCL Commerce*

3. In the *Coremedia* section, add the CoreMedia placement name and view name to the respective fields. The placement name defines the name of the placement of a page from which the content will be taken and the view name defines how the content will be shown. You will get these values from your site administrator. If no placement name is set, then the whole content of the `Augmented Category` or `Augmented Page` will be taken.

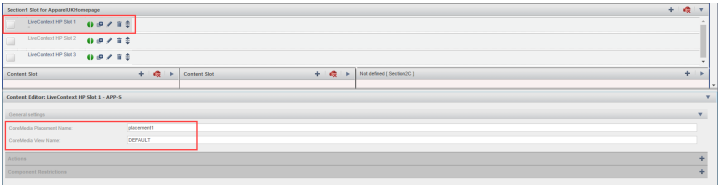

*Figure 6.25. Configure CoreMedia Content Widget*

## Adding Widget to new Page

*HCL Commerce* specific feature

NOTE

The CoreMediaContentDisplay feature is only available, when the SEO-URL configuration of your *HCL Commerce* has been customized by your administrator.

The CoreMediaContentDisplay feature is only available, when the SEO-URL configuration of your *SAP Hybris* has been customized by your administrator.

You can use *CoreMedia Content Cloud* to show CoreMedia content, such as articles, or complete micro sites in the commerce context (see Section 6.2.3.7, “Adding CMS Pages or Articles to the Commerce System” [355] for details). You need two different pages in the *HCL Commerce* system, one for each use case.

So, create a new page in the commerce system with a layout that contains only the CoreMedia Widget.

1. Create a new Page in the *HCL Commerce* Composer, which define the URL keyword in the *URL keyword* field. This is "CoreMediaContentDisplay".

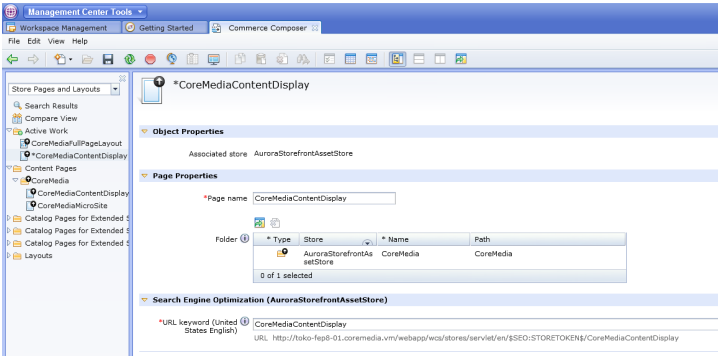


*Figure 6.26. Creating page for Content Display*

2. Create a new layout and connect it with the page created in step one.

3. Define a slot and place the CoreMedia Content Widget into the slot. For the CoreMediaContentDisplay layout, no property settings, except the *Widget Name*, are required in the widget

Now, you can add, for example, an article to a collection which is shown in a commerce category overview page. The article is shown as a teaser. When a user clicks the teaser, then, the article will be shown in its own page.

### 6.2.3.3 Adding Default Content for Categories and Product Detail Pages

For all shop pages (category overview, product details and others) to which you have added the Content Widget and to which you have not assigned specific content (described in Section 6.2.3.4, "Adding Category Specific Content" [348]), there must be default content that is shown instead. This content is taken from the category root or from the site root page.

All preparatory work (creation and configuring of default pages) will probably be done by a technical editor and does not need to be repeatedly executed in everyday life. Nevertheless, these standard pages can also be refilled on a daily basis.

The default content can either be added to the site root of type `Augmented Page` or to the category root page of type `Augmented Category`. In both cases, proceed as follows:

1. Open the catalog root or site root content item of your site.
2. Select an adequate layout in the *Content* or *Product Content* tab (for `Categories` or `Product Detail Pages`, respectively) and add the desired content to the placement that matches the one defined in the *CoreMedia Content Widget*.

The `Augmented Category` content item contains two page layouts: the one in the *Content* tab is applied to the Category Overview Page and the other in the *Product Content* tab is used for all Product Detail Pages. Both layouts are taken from the root category. The layouts that are set there form the default layouts for a site. Hence, they should be the most commonly used layouts. If you want something different, you can choose another layout from the list.

NOTE

If you want to use a completely different layout on a distinct page (a landing page's layout, for example, differs typically from other page's layouts), you should use different placement names for the "Landing Page Layout", for example with a `landing-page` prefix (as part of the technical identifier in the struct of the layout content item). This way, pages below the intermediate landing page, which use the default layout again, can still inherit the elements from pages above the intermediate page (from the root category, for instance), because the elements are not concealed by the intermediate page.

## 6.2.3.4 Adding Category Specific Content

NOTE

Prerequisite is, that the category in the commerce system has a layout assigned that contains the CoreMedia Content Widget.

You can add specific content to certain categories by augmenting the commerce `Category` with an `Augmented Category` item.

1. In the library, select the category that you want to augment. Already augmented categories have a different icon as shown in the screenshot (2).

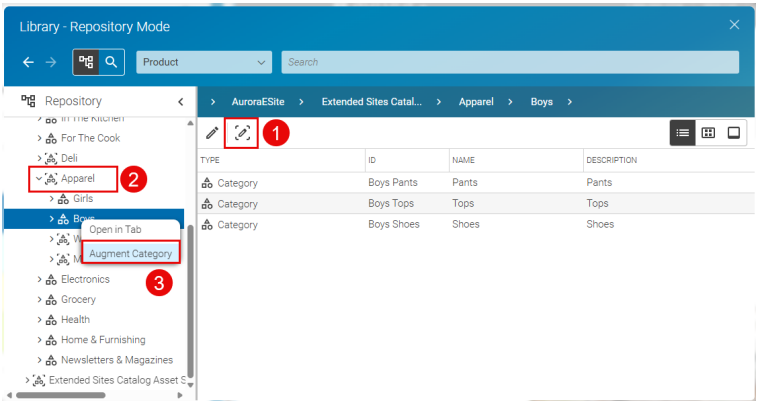


*Figure 6.27. Augment a category*

2. Select **Augment Category** (1) from the context menu or click in the toolbar.

   The `Augmented Category` content item is created in the preferred site folder below `Navigation/augmentation`. The content item opens up and all placements are set to inherit from the parent category.

   If you had the category open in Studio, then the form will be replaced by the `Augmented Category`. Other users that have the category open will get a message, that the category has been augmented.

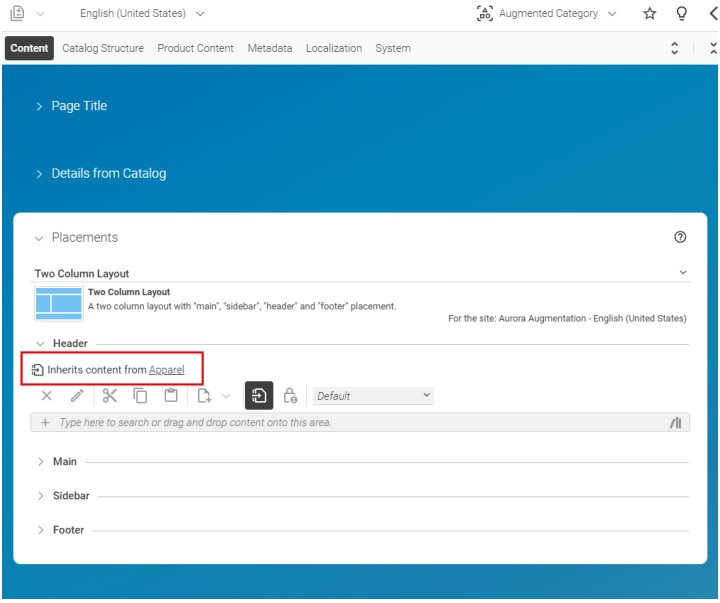


*Figure 6.28. Newly created augmented category*

3. In the *Content* tab, add your content to the placement, the name of which corresponds to the setting of the *CoreMedia Content Widget*.

Now, the category overview page shows the defined content.

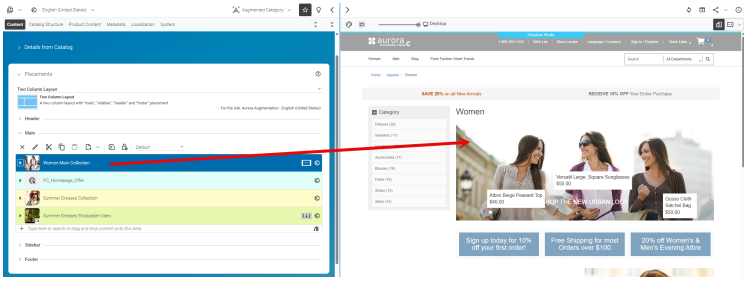

*Figure 6.29. Augmented Category with content*

## 6.2.3.5 Adding Specific Content for Product Detail Pages (PDP)

> **NOTE**
>
> Prerequisite is, that the PDP in the commerce system has a layout assigned that contains the CoreMedia Content Widget.

You can add the same content to all products of a specific category or specific content to a specific product. The first method, for example, for common category specific teasers and the second one for highlighting of a specific product.

### Augmenting all Products of a Category

To augment all products of a category, you can add specific content to the *Product Content* tab of an `Augmented Category`. The content in the placement, the name of which corresponds to the name defined in the *Content Widget*, is shown in all PDPs which belong to subcategories that are not linked to their own `Augmented Category` or `Augmented Product`.

1. In the Library, select the category which contains the products that you want to augment and open the context menu.

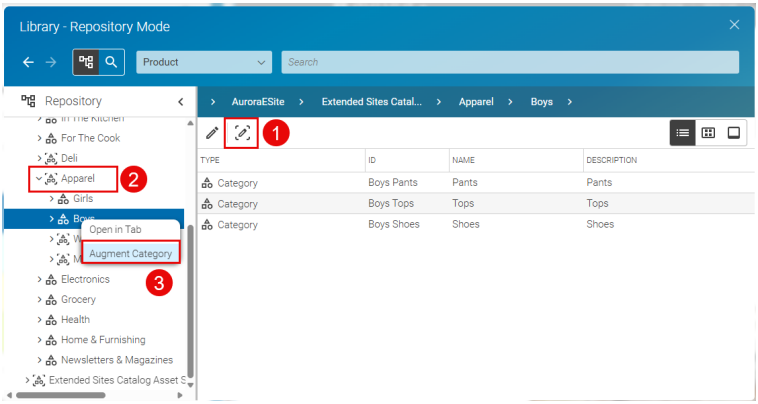


*Figure 6.30. Augment PDPs through a category*

2. Select **Augment Category** (1) from the context menu.

   The `Augmented Category` content item opens up. All placements of the *Product Content* tab are set to inherit from the parent category.

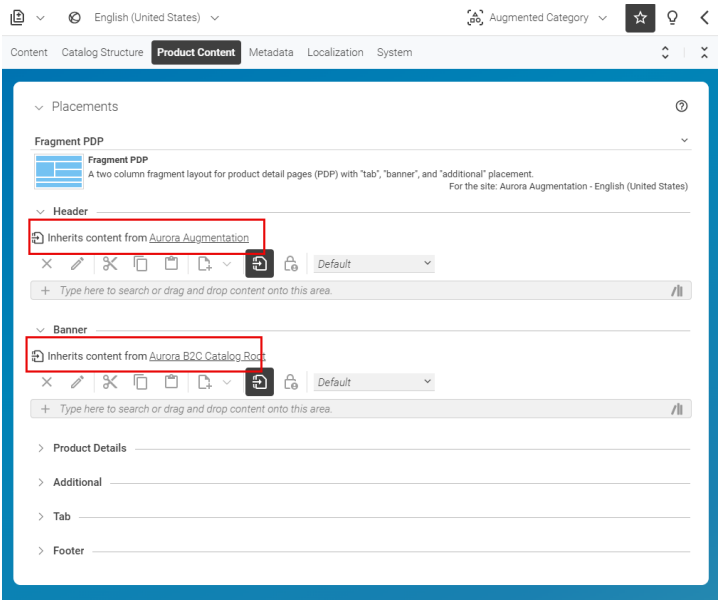


*Figure 6.31. Newly created augmented category*

3. Add your content to the placement in the *Product Content* tab whose name corresponds to the setting of the CoreMedia Content Widget.

Now, the product detail pages show the defined content.

## Augmenting a Specific Product

Augmenting a single product is done via the `Augmented Product` content type.

> **NOTE**
>
> When you augment a product with an image as described in Section 6.2.3.8, "Adding Content with the Asset Widget" [356], then this image is used in all catalogs where the product is shown. However, when you augment a product as described in this section, the augmentation is only visible in the catalog where you have augmented the product.

1. In the Library, select the product that you want to augment and open the context menu.

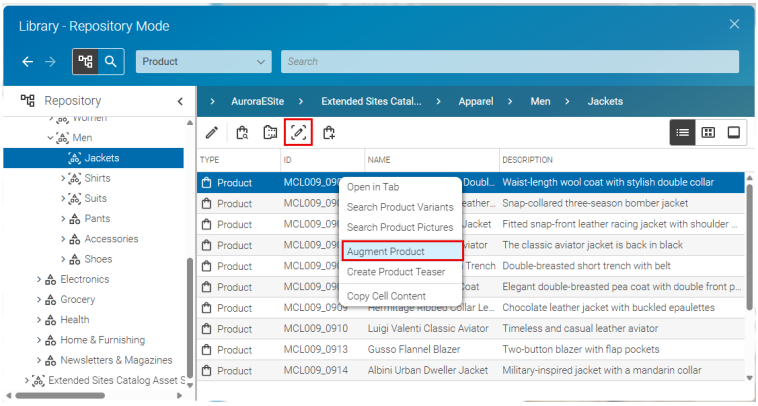


*Figure 6.32. Augment a Product*

2. Select **Augment Product** (1) from the context menu.

   The `Augmented Product` content item opens up. All placements of the *Content* tab are set to inherit from the parent categories.

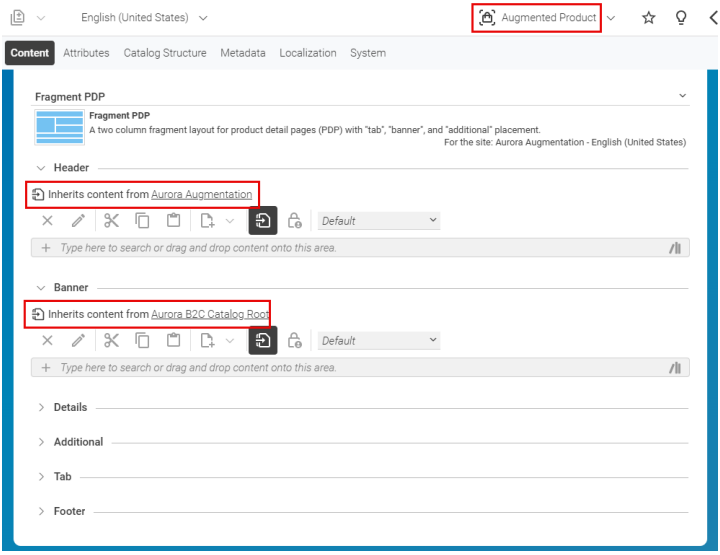


*Figure 6.33. Newly created augmented product*

3. Add your content to the placement in the *Content* tab whose name corresponds to the setting of the CoreMedia Content Widget.

## 6.2.3.6 Adding Content to Other Pages

You can not only augment catalog pages with content from the CoreMedia system, but also all other pages in your store. Most prominently the homepage, but also search pages, log-in pages or others.

1. Create a new `Augmented Page` content item in your site folder.
2. Add the new page to the *Navigation Children* property of the root `Augmented Page` of your site.
3. Select an adequate layout in the *Content* tab and add the desired content to the placement that matches the one defined in the *CoreMedia Content Widget*.

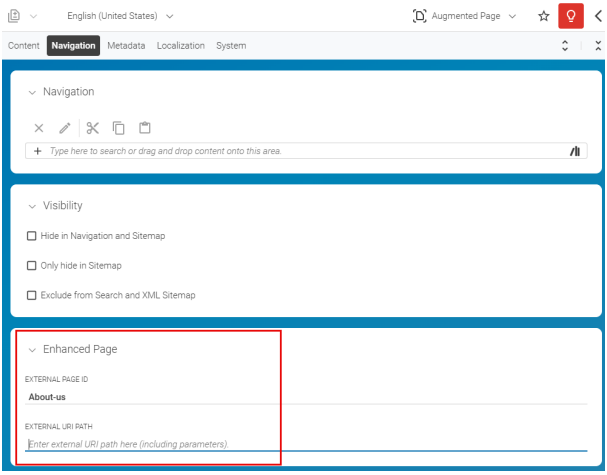


*Figure 6.34. Navigation Settings for another page*

4. Add the page ID of the shop page that you want to augment to the *External Page ID* field. Typically, the page ID is the last part of the shop URL without any parameters. For example, consider the following URL:

   ```
   https://<shop-host>/<pathToSite>/contact-us
   ```

   Here, the page ID would be contact-us.

When you have a simple SEO conform URL without further parameters, you would be done and would see the page in the *Studio* preview.

## Non-SEO URLs with *HCL Commerce*

*Connector for HCL Commerce* specific feature

When you have an *HCL Commerce* system with a non-SEO URL like the following, you have to add additional information to the *External URI Path* field. This is especially required to get a preview in *Studio*.

```
https://<shop-host>/en/aurora/AdvancedSearchDisplay?
catalogId=10152&langId=-1&storeId=10301
```

Add the part of the URL behind `/en/aurora` to the *External URI Path* field. See Figure 6.34, “Navigation Settings for another page” [354] for an example. As you

can see, you can use the following placeholders for some parameters. You have to set the placeholders in curly braces.

| Token | Description |
|---|---|
| `storeId` | The current store ID |
| `catalogId` | The current catalog ID |
| `langId` | The current language ID |

*Table 6.3. Placeholders for URL parameters*

When you have done everything right, you will see the augmented page in the *Studio* preview.

## 6.2.3.7 Adding CMS Pages or Articles to the Commerce System

> **NOTE**
>
> As a prerequisite, a `CoreMediaContentDisplay` Page has to be defined in the commerce system that contains the CoreMedia Widget. The `CoreMediaContentDisplay` feature is only available, when the SEO-URL configuration of your commerce system has been customized by your administrator.

You can not only augment existing pages in the commerce system, but you can also add pages or Articles to the store that were completely created in the CMS.

In order to add a CMS page or article to your commerce pages, proceed as follows:

1. Create a new page or article in your site folder.
2. In the new page, add the content of the page to the *Main* placement in the *Content* tab.

   or

   Enter your content into the new `Article` content.
3. The page must be part of the site. Therefore, link the new page from the *Navigation Children* property of the site root `Augmented Page` or from any other page that is part of the site.

4. Link the new page or article from other content, which is shown in commerce pages. For example, in a collection which is shown on an augmented category page.

   Now, when you click the link to the new page or article in the catalog, you will see the content with the catalog header and footer.

# 6.2.3.8 Adding Content with the Asset Widget

*Connector for HCL Commerce* specific feature

With the *CoreMedia Asset Widget*, you can add pictures, videos and downloadable content to product detail pages of the *HCL Commerce Server Management Center*.

To add this content to the product detail page, you have to perform two steps:

- Replace the default *HCL Commerce Full Image Widget* in the layout of the product detail page with the *CoreMedia Asset Widget*. This is an administrative task and is likely only be done once.
- Link pictures, video and download items with the product.

## Adding CoreMedia Asset Widget to *HCL Commerce*

Add the *CoreMedia Asset Widget* to the required slot of a product detail page layout in *Management Center*. The widget has the following options:

NOTE

If you use multiple catalogs and add an image to a product. then this image will be shown in all catalogs where the product appears. That is because the *HCL Commerce* catalogs are only views on the same database.

| Option | Description |
|---|---|
| Display Pictures and Videos | If checked, a picture gallery is rendered from CMS pictures and videos that are associated with the product. |
| Orientation | The orientation of the pictures (only relevant if pictures are included). The possible values are *Square* and *Portrait* |

| Option | Description |
| --- | --- |
| Include Downloads | If checked, an *Additional Downloads* list is rendered from CMS *Download* documents that are associated with the product. |

*Table 6.4. CoreMedia Product Asset Widget configuration options*

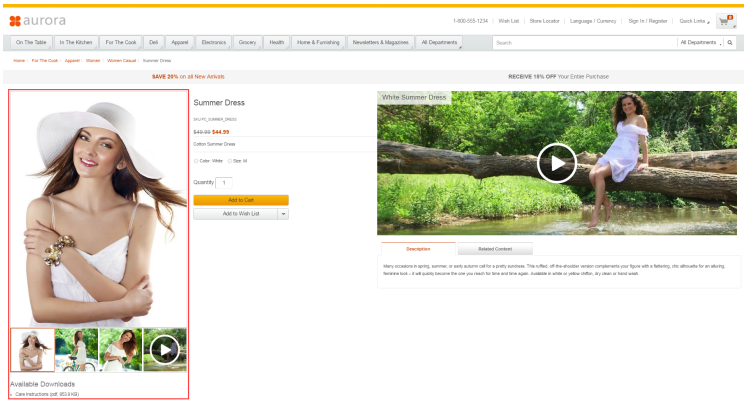


*Figure 6.35. Product detail page with image gallery and download content*

## Assign a Product to a Content Item

In order to map an image, video, 360°-View or download item from the CoreMedia system to an eCommerce system product, you have to link from a content item of type `Picture`, `Video`, `360°-View` or `Download` to a product. Proceed as follows:

1. Open the content item that contains the image, video, 360°-view or download artifact that you want to assign to the product.
2. Open the *Metadata* tab of the content item.
3. Find the product for which you want to define a content item in the Library and drag it onto the *Assigned Products* link list.

NOTE

The *Assigned Products* property is the same that is used to replace a product or SKU image as described in Section 6.2.3.9, "Replacing Commerce Images in Products and SKUs with CMS Images" [358]. So, when you use both approaches in parallel, the product image in the PDP will be replaced with the content of the Asset Widget. All other occurrences of the product image (teaser, thumbnails...) will be replaced with the first image defined in the property.

If you have added the *CoreMedia Asset Widget* to the layout of the product detail page, then you will see the linked content as shown in Figure 6.35, "Product detail page with image gallery and download content" [357]

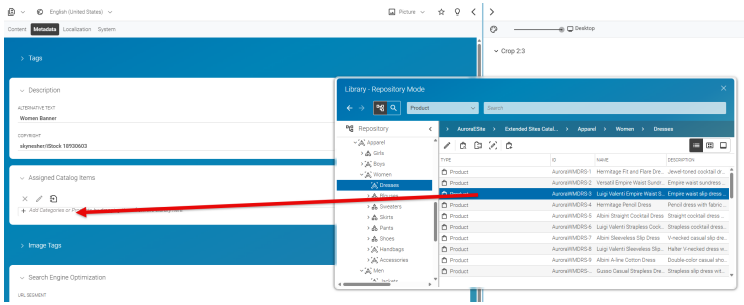


*Figure 6.36. Assign a product to a picture*

# 6.2.3.9 Replacing Commerce Images in Products and SKUs with CMS Images

*CoreMedia Content Cloud* allows you to manage images in the CoreMedia system that will be included in products and SKUs of the commerce system. You have to add a product or SKU to a `Picture` item.

*Connector for HCL Commerce specific*

For the *Connector for HCL Commerce* adding images is a two-step process. First you have to add a product or SKU to a `Picture` item and afterwards you have to add a specific URL to the product definition in the HCL system.

*Fallback images*

You don't have to assign every SKU to a picture content. If an SKU is not assigned to a picture content the asset management searches for the picture content assigned to the master product of the SKU or uses the default image for the site.

## Assign a Product to an Image

In order to map an image from the CoreMedia system to a commerce product, you have to link from a `Picture` item to a product. Proceed as follows:

1. Open the `Picture` content item that contains the image that you want to assign to the product.
2. Open the *Metadata* tab of the content item.
3. Find the product for which you want to define an image in the Library and drag it onto the *Assigned Products* link list.

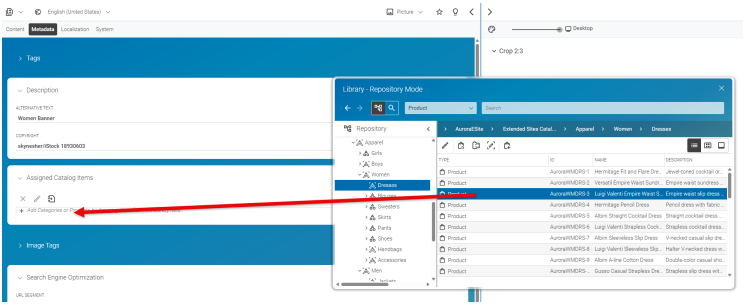


*Figure 6.37. Assign a product to a picture*

### *Connector for HCL Commerce* specific

The *Assigned Products* property is the same that is used to fill the Asset Widget as described in Section 6.2.3.8, “Adding Content with the Asset Widget” [356]. So, when you use both approaches in parallel, the product image in the PDP will be replaced with the content of the Asset Widget. All other occurrences of the product image (teaser, thumbnails...) will be replaced with the first image defined in the property.

## Add the Image URL to the Product

### *Connector for HCL Commerce* specific feature

In order to let the *HCL Commerce* system request the image from the CoreMedia system you have to add a CoreMedia URL to the product definition. The URL has the following format:

```
http://<cmshost>:<cmsport>/blueprint/servlet/catalogimage/product/<storeId>/en_US/thumbnail/<SKUNumber>.png
```

```
http://<cmshost>:<cmsport>/blueprint/servlet/catalogimage/product/<storeId>/en_US/full/<SKUNumber>.png
```

You will get the URL from your system administrator.

1. Open the product definition in the *HCL Commerce  Management Center*.
2. Open the *Manage Product* tab.
3. Enter the appropriate URL into the *Thumbnail* and *Full image* properties.

Now, you will see the new image from the CoreMedia system displayed in the *HCL Commerce*.

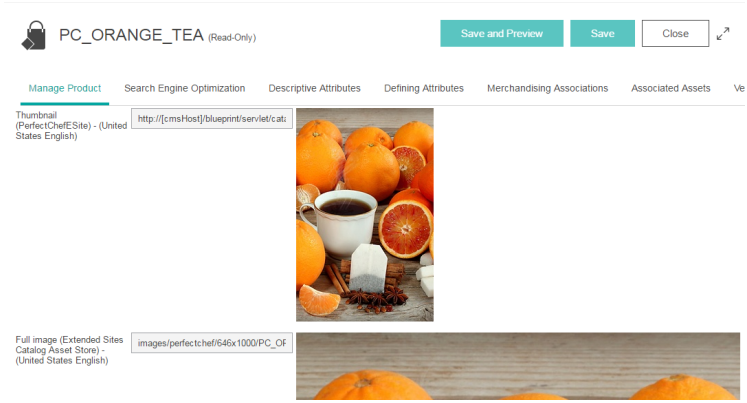


*Figure 6.38. Set Product Image URLs in Management Center*

End of *Connector for HCL Commerce* feature section

## Adding Default Image

When there is no image defined for a category, an SKU or a master product, the system will look for a default image. Proceed as follows, to define the default image:

1. Open the root `Page` content item of your site.
2. Add a link property with name `livecontext.assets.default.picture` to the *Local Settings* field of the *Settings* tab.
3. Drag the `Picture` item with the default image to the new link property.

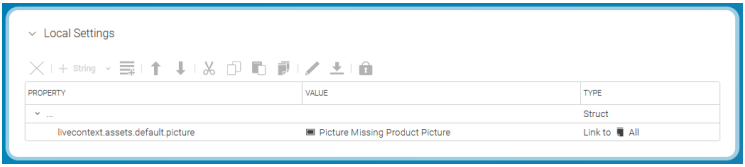


*Figure 6.39. Set default catalog picture in Studio*

Now you have defined a default image for your site.

# 6.2.3.10 Replacing Commerce Images in Categories with CMS Images

*CoreMedia Content Cloud* allows you to manage images in the CoreMedia system for categories of the commerce system. The mechanism and steps are equivalent to the product image management feature as described before. With the *Connector for Salesforce Commerce Cloud* and *Connector for SAP Commerce Cloud*, you simply have to link a Category to a `Picture` item.

## *Connector for HCL Commerce* specific configuration

First you have to link a Category to a `Picture` item and afterwards you have to add a specific URL to the category definition in the commerce system.

Add the following CoreMedia URL formats to the category definition in *HCL Commerce*:

```
http://<cmshost>:<cmsport>/blueprint/servlet/catalogimage/category/<storeId>/en_US/thumbnail/<category_code>.png
```

```
http://<cmshost>:<cmsport>/blueprint/servlet/catalogimage/category/<storeId>/en_US/full/<category_code>.png
```

NOTE

*HCL Commerce* supports multiple image URLs for products in an extended sites environment. That means that you can specify a dedicated image URL per product and per site although the catalog is shared between different sites.

On the other hand it is not supported to override image URLs for categories in an extended sites environment. That means that the same image URL is used for all sites. You can add a `[storeId]` placeholder to image URLs which is dynamically replaced with the storeId-value of the current site at runtime. The image URL format looks like this:

```
http://myHost:40080/blueprint/servlet/catalogimage/category/[storeId]/en_US/thumbnail/myCategoryCode.png
```

Please note, that for `[storeId]` resolution the following feature described in Section 6.5.4.2, "Placeholder Resolution for Asset URLs" in *Blueprint Developer Manual* must activated.

## 6.2.3.11 Activating the Replacement of Parts of *HCL Commerce* Pages with CoreMedia Content

*HCL Commerce* specific feature

With *CoreMedia Content Cloud* parts of the commerce site can be edited in *Studio*. In this case, those parts are rendered by CoreMedia.

### Editable parts

The following parts can be edited in *Studio*:

- The header including the navigation.
- The navigation only.
- The navigation in the footer
- The footer

You can independently activate the rendering by CoreMedia for each part. Add the following Boolean property with value `true` to the settings of the site:

- Header: `livecontext.manageHeader`
- Navigation: `livecontext.manageNavigation`
- Footer Navigation: `livecontext.manageFooterNavigation`
- Footer: `livecontext.manageFooter`

## Navigation

For a detailed description of how to work with the navigation see Section 6.2.3.12, “Changing the Navigation” [363].

# 6.2.3.12 Changing the Navigation

*Connector for HCL Commerce* specific feature

With *CoreMedia Content Cloud* the navigation of the commerce site can be edited in *Studio*. In this case, the navigation is rendered by *CoreMedia Content Cloud*.

## Activating Navigation Editing

In order to enable the editing of the site, you have to add the Boolean property `livecontext.manageNavigation` to the settings of the site and set the property to true.

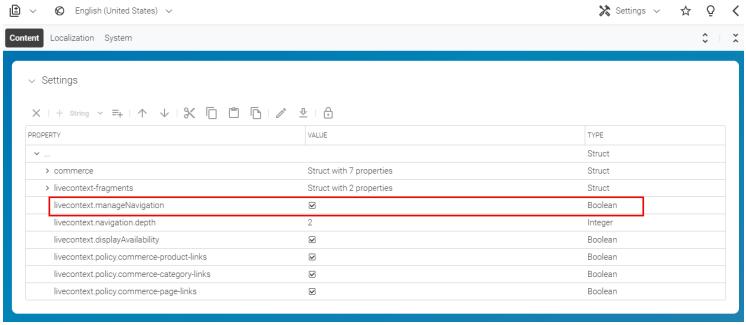


*Figure 6.40. Enabling editing of navigation*

With the `livecontext.navigation.depth` property, you define up to which nesting depth the navigation is rendered.

## Editing the Navigation

With this feature, you can edit the navigation in three ways:

- Add CoreMedia pages or other content to the main navigation
- Change the navigation order of categories, add or remove other categories
- Hide categories and their subcategories from the navigation

### Adding Pages to the Top Navigation

Sometimes you may want to add editorial pages or articles to the top navigation of the website. To do so proceed as follows:

1. Create a new `Page` content item using **Create from Template** from the **Create** menu.
2. Drag the root `AugmentedPage` of the site onto the *Navigation Parent* field of the *Create from Template* dialog and select a template. Click **[Create]**.

   The new page opens up. It inherits content from the site root page. The page was linked to the end of the *Navigation* field of the root page.

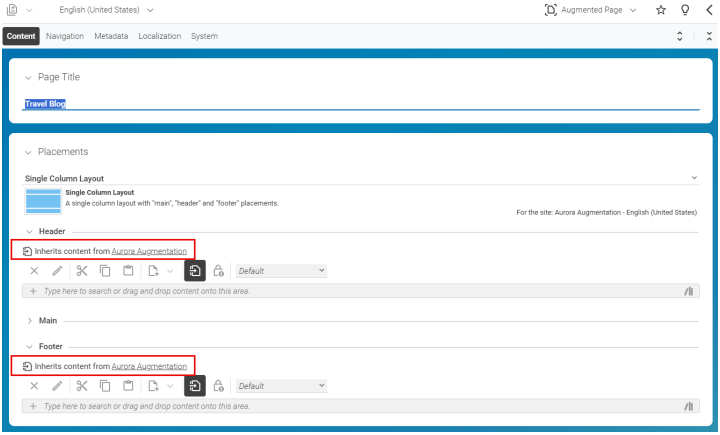


*Figure 6.41. New page with inherited header and footer*

3. When you want to move the page to a different position in the navigation menu, open the root `AugmentedPage` content item. In the *Navigation* in the *Navigation* field, move the newly created page to the position you want.

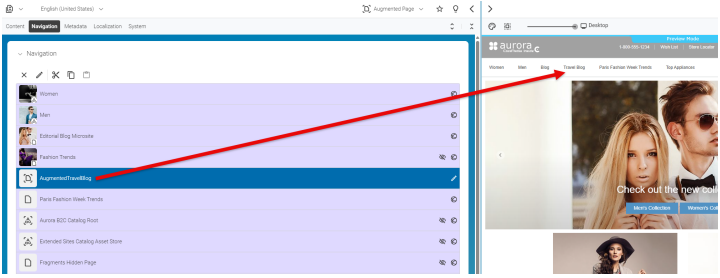

*Figure 6.42. New page in navigation*

The *Navigation* list contains some elements which are not shown in the navigation. This is indicated by the crossed out eye symbol.

4. Adapt the content in the new page to your needs.

You can add new pages only to the root augmented page but not to categories.

### Rearranging Categories

This method can be used, for example, when you want to feature a category on the home page, which is usually located below other categories deep down in the navigation tree or when you want to change the order of categories in the navigation.

> **NOTE**
>
> The changed navigation will not influence the inheritance of content or settings of the moved category. These items will always be inherited along the catalog hierarchy defined in the *HCL Commerce* system.

Editing the navigation of a category might involve:

- Changing the order of the existing navigation children
- Removing a navigation children
- Adding a navigation children

In order to change the navigation of a `Category`, proceed as follows:

1. In the catalog view of the Library select the `Category` in which you want to edit the navigation. If the category is not already augmented, augment it as described in Section 6.2.3.4, “Adding Category Specific Content” [348].
2. Open the `Augmented Category` and in the *Catalog Structure* tab in the *Website Navigation* field check *Select Children*.

The link list is already filled with the categories that are defined in the *HCL Commerce* catalog hierarchy.

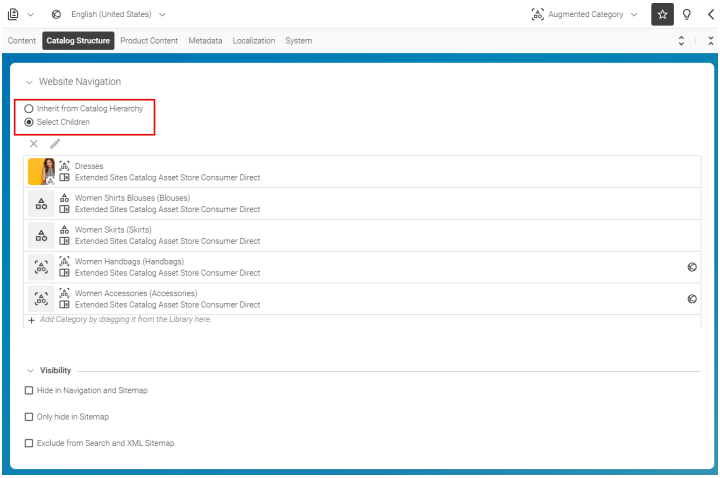


*Figure 6.43. Make navigation editable*

3. Now, it depends on the changes you want to achieve:
   - If you want to add a new category to the navigation, drag the `Category` that you want to add to the navigation into the *Website Navigation* link list.
   - If you want to delete a category in the navigation, select the `Category` that you want to delete and click the delete button.
   - If you want to change the order of categories, drag a `Category` in the link list to the new position.

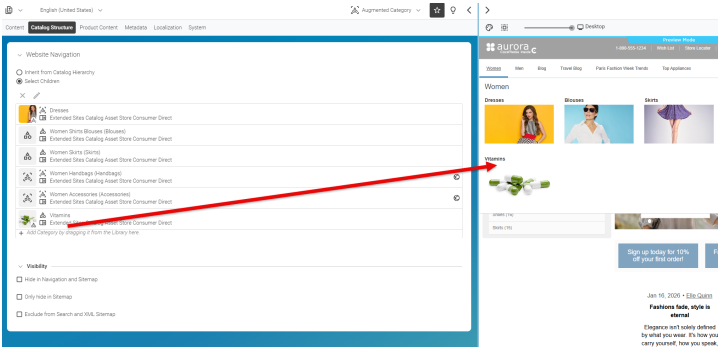


*Figure 6.44. Added category in navigation*

Now, you are done. The added category appears in the navigation. You can check the original *HCL Commerce* catalog hierarchy on the *Catalog Hierarchy* tab.

> **NOTE**
>
> When you switch back to *Inherit from Catalog Hierarchy*, your previous children settings will be stored. So when you check again *Select Children*, your previous selection will be restored.

## Hiding Categories from the Navigation

You can hide a category and all its child categories from the navigation.

1. In the catalog view of the Library select the `Category` that you want to hide. If the `Category` is not already an `Augmented Category` item, augment it as described in Section 6.2.3.4, "Adding Category Specific Content" [348].
2. Open the `Augmented Category` and in the *Catalog Structure* tab in the section *Visibility* under the *Website Navigation* field check *Only hide in Sitemap* or *Hide in Navigation and Sitemap*. If you also want to exclude the category from search and XML sitemap, then check the last item *Exclude from Search and XML Sitemap* in the checkbox.

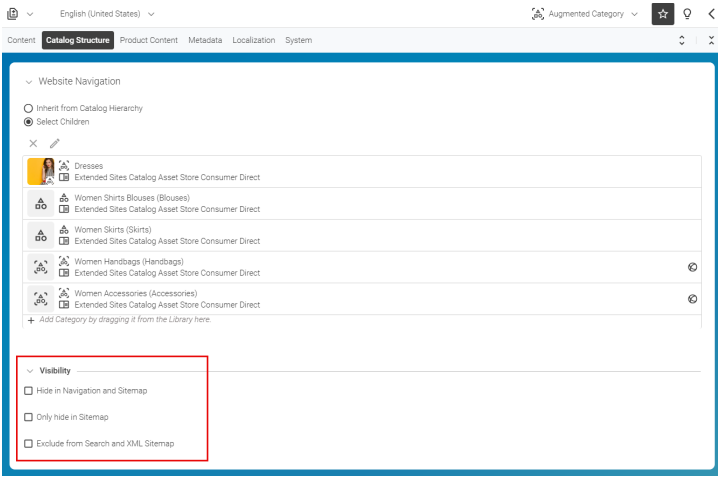


*Figure 6.45. Hide from navigation*

The `Category` disappears from the navigation.

# 7. Working with Personalized Content

CoreMedia Native Personalization (or short Personalization) works on the client-side. That means, that the content shown to the customer is selected on the browser, not the CoreMedia system. Nevertheless, you as an editor, prepare the content that is shown, depending on segments and experiences.

Special content types that are part of *Personalization* are used to provide the personalization functionality:

- A content type to create an experience. This is the type `Experience` (or technically `P13NExperience`).
- A content type to connect third-party segments with the CoreMedia system. This is the type `External Segment` (or technically `P13NSegment`).
- A content type to define content shown, depending on segments . This is the type `Customer Segment` (technically `P13NSegmentation`.

# 7.1 Working with Experiences

Your CoreMedia system might have been connected with third-party provider portals. In this case, you can access the experiences in a content item of type `Experience`.

## Creating an Experience

Experiences are defined in a third-party system, such as Kibo. An experience contains different variants which are selected for a user. For A/B/n tests, the variant might be selected randomly or individually for each user. An experience also contains a baseline which is shown when no variant is selected. This is the case, for instance, if the user is assigned to the control group for an A/B Test or if the user doesn't match the targeting conditions of the experience.

1. Create a new content item of type `Experience` (technically, a P13NExperience content type).

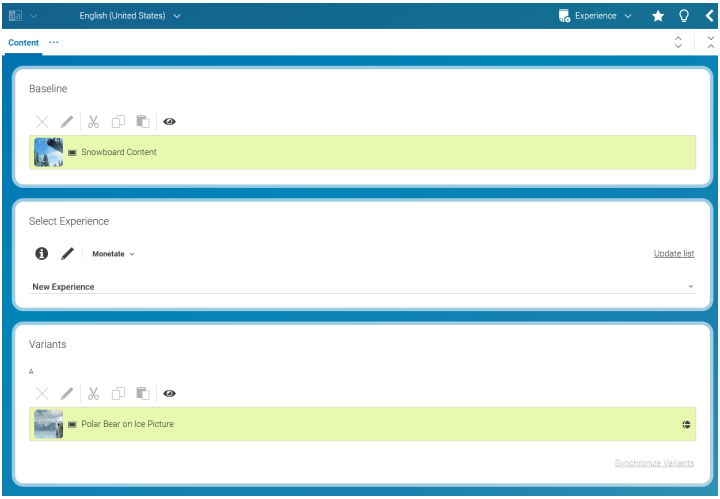


*Figure 7.1. Define an experience*

2. Select an Experience from the dropdown list in the *Select Experience* panel. The *Variants* panel will show the variants, defined in the selected experience.
3. Drag a teasable content item (for example, an article or video) into the *Baseline* panel.

4. Drag a teasable content item (for example, an article or video) into the different fields of the *Variants* panel.
5. Now, you can use the Experience content item in every place, where you can use a single item (no Collections) of type `CMTeasable` (Article, Video, Teaser…).

## Getting Information about the Experience

Click the *i* icon beside the experience dropdown box. A window opens up which some information about the selected experience.

*Figure 7.2. Information window for an experience*

## Refreshing Experience Cache

CoreMedia caches the list of available experiences for a short period for technical reasons. Therefore, changes done in the provider's portal are not immediately available in Studio.

To avoid this issue, you can refresh the cache as follows:

1. Open the `Experience` content item.

*Figure 7.3. Update experience variants*

2. Click the **[Update list]** button in the *Select Experiences* panel.

This cleans the cache and reloads the current state from the experience provider. Reloading the state may take some time so be patient if the changes are not visible immediately.

## Update Already Used Experiences

Changes made to already used experiences, may not be reflected in the CoreMedia contents, for example if a variant is added or removed from an experience. In this case, the *Synchronize Variants* link at the bottom of the variant list gets activated.

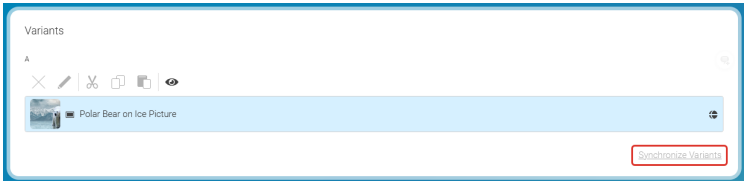


*Figure 7.4. Synchronizing variants*

Click this link to update the variants to the state saved in the experience provider.

# 7.2 Working with Segments

Segments group customers by specific characteristics, such as age, gender or interests. When segments are used, Customers from different segments will see different content on your website.

## Creating a Segmentation Content Item

Segments are defined in a third-party system and are linked to the CoreMedia system via `External Segment` content items. You can use these segments in `Segmentation` content items to define different content for customers that are in different segments.

1. Create a new content item of type `Segmentation`.

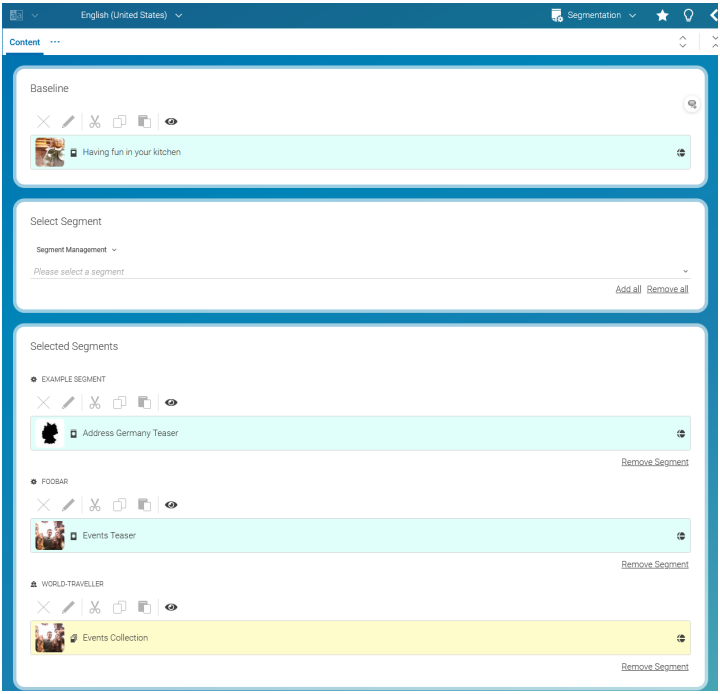


*Figure 7.5. Segmentation Content Item*

2. Drag a teasable content item (for example, an article or video) into the *Baseline* panel of the *Content* tab. This content is shown when a user does not belong to a segment or belongs to a segment, for which no variant has been added.
3. In the *Select Segment* panel select a segment from the dropdown box. The dropdown box lists all `External Segment` items that are defined in the site and that are not already used in the current content item.

   You can also click the *Add all* link to add all defined external segments at once to the *Selected Segment* panel.
4. Drag a teasable content item (for example, an article or video) into each of the newly created segment fields in the *Selected Segments* panel.

Now, you can use the `Segmentation` content item in every place, where you can use a single item (no Collections) of type `CMTeasable` (Article, Video, Teaser…).

# 7.3 Previewing Client Personalization

You can preview variants and segments either from the toolbar of an specific `Experience` or `Segmentation` content item or make a global setting in the Preview toolbar.

## Previewing from the Linklist Toolbar

In order to preview the content of a variant or segment, click the Preview icon in the toolbar of the variant or segment. The corresponding variant/segment content will be loaded into the preview window.

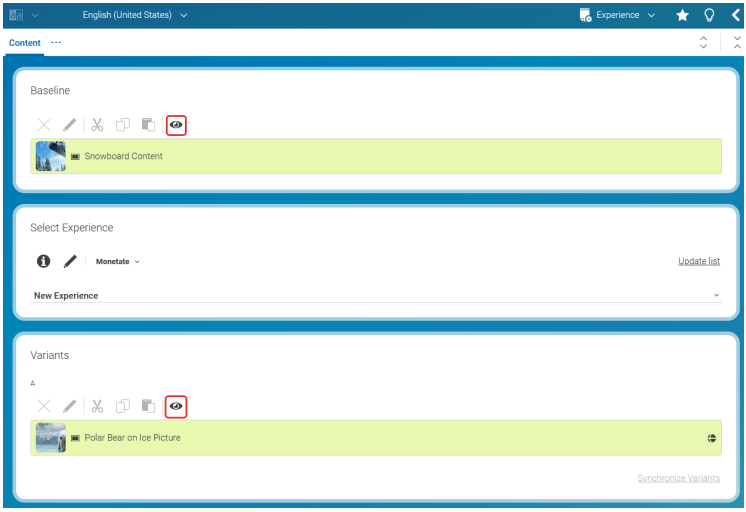


*Figure 7.6. Select preview from the linklist toolbar*

## Configuring Preview in Preview Toolbar

In the preview toolbar, a new menu has been added. It allows you to enable a segment and a combination of experience variants for preview.

1. Click the Personalization Preview icon in order to open the Preview menu.

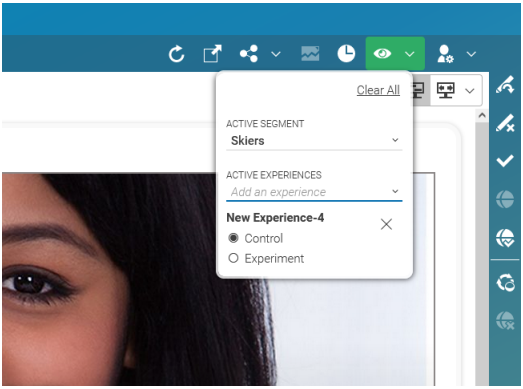


*Figure 7.7. Preview in Preview Toolbar*

2. In *Active Segment* select a segment from the dropdown box for which the content should be shown. You can only select one segment

   In *Active Experiences* select an experience from the dropdown box. You can add more than one experience. When you have selected an experience, select the checkbox of the variant for which you want to show the content.

# 8. Working with User Generated Content

CoreMedia Elastic Social feature

This chapter describes the use cases that are supported by the *Elastic Social Studio Plugin*.

- Section 8.1, “Working with Comments and Reviews” [377] shows you how to moderate and edit comments.
- Section 8.2, “Working with Users” [389] shows you how to moderate and edit users.

# 8.1 Working with Comments and Reviews

*Comments*

Comments are a means to engage your users and to find out what they think about your website. Users of a CoreMedia Blueprint website can write plain text comments or add images to the comment. They can also rate or like content or complain about comments or other users.

*Reviews*

Reviews are a special type of comments with a title and a rating in addition to the comment text. All statements on working with comments in this section equally hold for reviews (along with the additional options to moderate title and rating).

*Moderation*

Because of the alleged anonymity of the web, some users tend to write comments that might offend other people, that are criminal or in any way unwanted and drive the community users away. Therefore, it is advisable to moderate the comments on your website. Moderation is done in the Moderation View as shown in Figure 8.1, “Moderation View” [377]

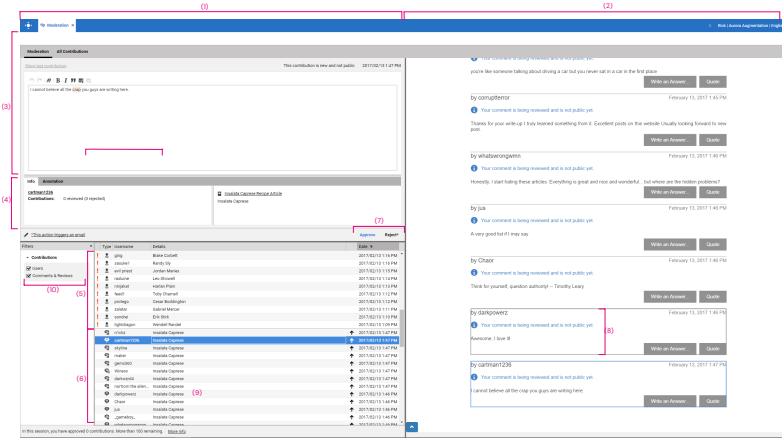


*Figure 8.1. Moderation View*

The *Elastic Social Studio Plugin* allows you to premoderate or post-moderate comments or to not moderate at all.

*Premoderation*

Premoderation means that a new comment is only shown to its author (8) but it does not appear on the website. The comment appears in the Moderation View (9) where you have to approve or reject (7) the comment. Approving the comment makes it appear to all website visitors.

*Post-moderation*

Post-moderation means that a new comment is immediately shown on the website, but you have the opportunity to approve or reject the comment later. This increases the speed of the discussions but has the risk that unwanted comments appear on the website for a period or within discussions and quotations of community users.

A moderated comment is removed from the comment list. The comment list shows a maximum number of comments and users profiles. By default, these moderated items are sorted to show the latest ones first but you can switch the sort order by clicking the *Date* column. This will show you the oldest comments and user profiles first.

*Complaints*

A comment or user profile that has been approved returns to the list when a user complains about it. That is, the user clicked **[Complain]** on the website. Comments and user profiles with complaints appear on top (5) of the moderated item list since processing these hints from the community users are a valuable help to the moderation activities. They are marked with an exclamation mark.

*Blacklist*

To increase the speed of the moderation process, the *Elastic Social Studio Plugin* offers you a blacklist functionality that reduces the time needed per comment to determine whether the comment is unwanted or not. It does this by highlighting offending and suspicious words. You can add or remove words to or from this blacklist and the plugin highlights them in the comment view.

*Prioritizing content and users*

If you have an article for which you expect a lot of controversial comments or if you want to stick to the moderation of the comments of a special article for some other reason then you can prioritize the moderation of comments of an article. All comments that belong to the article will be shown at top of the moderated item list below the complaints (6) and are marked with an arrow. You can also prioritize users. That is, user profiles will appear at the top of the moderated item list.

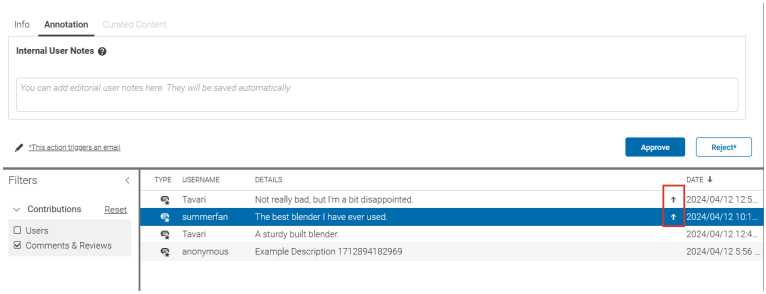


*Figure 8.2. Prioritized comments*

*Curated transfer*

You can transfer comments written by the user into the CMS repository for further usage. See Section 8.1.11, “Transfer Comments in the Repository” [386] for details.

# 8.1.1 Opening the Moderation View

Moderation of comments and new users is done in the *Moderation View*. In order to open this view, open the **Main** menu in the Header Bar and click **Moderation**.

# 8.1.2 Filtering the List of Moderated Items

It is possible to filter the list of comments and users in the *Moderation View* as shown in Figure 8.3, “Applying filters to the list of comments and users” [379]. Filtering users and comments may result in an empty result list. In addition, comments may be filtered in terms of comment categories. Filter settings are persisted for each user across *Studio* sessions.

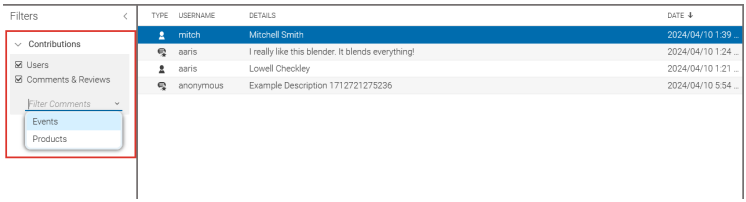


*Figure 8.3. Applying filters to the list of comments and users*

It is subject to configuration, under which categories a comment falls and which categories are available as filter options. For details, refer to Section 3.3.11, “Configuring Available Comment Categories” [90].

# 8.1.3 Approving or Rejecting a Comment

## Approving a comment

In order to approve a comment simply click **[Approve]**.

The comment disappears from the list and is shown on the website.

## Rejecting a comment

If you need to reject a comment there is a small difference between a comment from an anonymous user and a registered user. A comment from an anonymous user is removed without further notice. A registered user, on the other hand, will get an email notification explaining that the community policy was violated. You can edit the default email before sending it. Simply click the **[email]** link as shown in Figure 8.4, “Select the email window and reject comment” [380] and follow the instructions from Section 8.2, “Working with Users” [389].

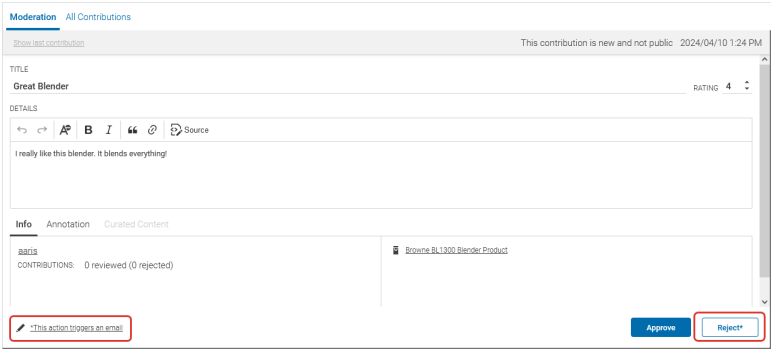


*Figure 8.4. Select the email window and reject comment*

In order to reject the comment simply click **[Reject]** .

An email is sent to the user and the comment disappears from the list and is not shown on the website anymore. Nevertheless, you as an editor will still see the comment in the Preview, marked as "rejected", to preserve the context in which comments have been written.

## Restoring last comment or user

If you have approved or rejected a comment or user, it disappears from the comment list. You can restore this last comment or the last approved user by clicking the **[Last Contribution]** button as shown in Figure 8.5, “Select the email window and restore last comment or user” [381].

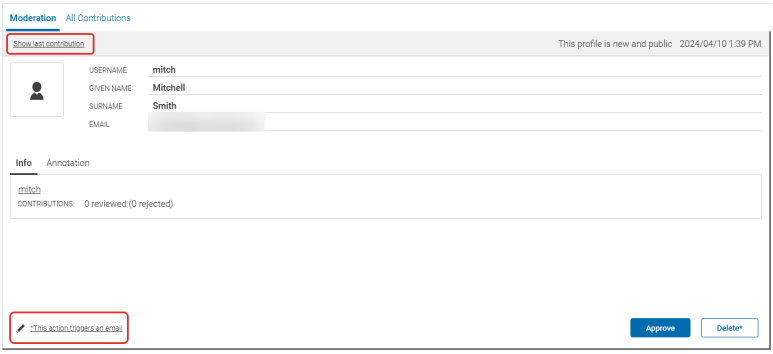


*Figure 8.5. Select the email window and restore last comment or user*

## 8.1.4 Prioritize a Content

In order to prioritize a content for instance an article proceed as follows:

1. In the moderated item list, find a comment that belongs to the article that you want to prioritize.
2. Hover over this row and an icon with an arrow up appears, which you can click on to prioritize the article.

You can only prioritize one comment target. To deprioritize it again, you can either prioritize another one or you can hover over a prioritized comment and click on the icon of an arrow down which will appear.

All comments that belong to the article and need moderation appear at the top of the moderated item list, right behind articles or users profiles that have complaints. These are marked with an exclamation mark.

The article is only prioritized for the current user and session. That is, after a relogin the prioritization is not active anymore.

## 8.1.5 Editing a Comment

If you want to edit a comment, start typing in the text field at the top of the *Moderation View*. You can set or remove links, format text as bold or italic and mark text as a quote. Beware that most community users react strongly when they find their comments edited by moderators. No notification is sent to the author of a comment when it is edited.

# 8.1.6 Working with the Blocklist

*Elastic Social* lets you define a blocklist of suspicious or offending words that is shared between the moderation team. If a comment contains a word from the blocklist, then the word will be highlighted and helps to determine quickly if a comment is unwanted or not.

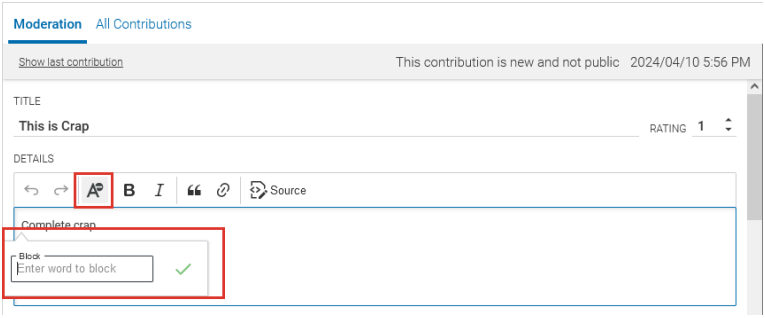


*Figure 8.6. Add word to blocklist*

You can add words to and remove words from the blocklist like this:

## Adding words to the blocklist

1. Double click or select the word you want to add to the blocklist.
2. Click the icon. A small dialog opens up and contains the selected word.
3. Click the icon.

The word has been added to the list and will be highlighted in the Comment View of all moderators.

## Removing words from the blocklist

1. Double click or select the word you want to remove from the blocklist.
2. Click the icon. A small dialog opens up and contains the selected word.
3. Click the icon.

The word has been removed from the list and will not be highlighted anymore in the Comment View of all moderators.

You can also just click the blocklist icon and directly type in words you want to add or remove.

# 8.1.7 Opening Corresponding Contents

If you want to switch from a comment to the corresponding content, an article for instance, to fix a problem that is mentioned in the comment, simply click the content name link below the comment text. Figure 8.7, “Open the target content in the Form” [383] shows the link.

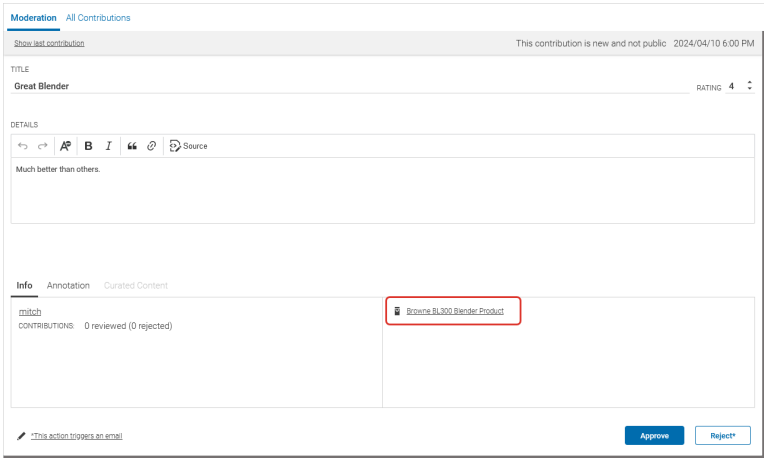


*Figure 8.7. Open the target content in the Form*

Switch to the *Curated Content* tab to display a list of curated content. The tab is disabled if no curated content exists. See Section 8.1.11, “Transfer Comments in the Repository” [386] to learn how to create articles and other content from comments and reviews.

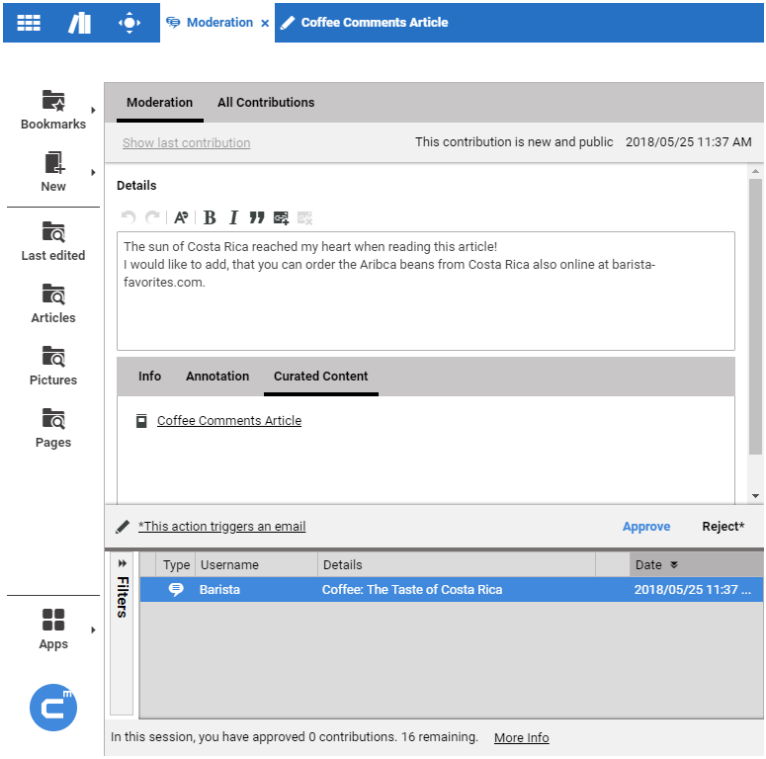


*Figure 8.8. Show curated content list in the Form*

All contents open in a separate form like you are used to in *CoreMedia Studio*.

## 8.1.8 Writing Comments

If you, as a moderator want to participate in a discussion, you can do this on the website or, more convenient, in the Preview. Therefore, you can login in the Preview of the currently selected comment. Click the **[Login]** button in the upper right corner of the *Preview* and enter your Elastic Social login credentials. You need to have registered as user on the website. When logged in, you can write comments like any other user of the website.

# 8.1.9 Annotating Users

You can add text for internal use to users. Simply type your annotation into the *Annotation* tab below the comment or user data. The text will be automatically stored and is only visible for editors.

You cannot add annotations to the comments of anonymous users, because these users have no user profile.

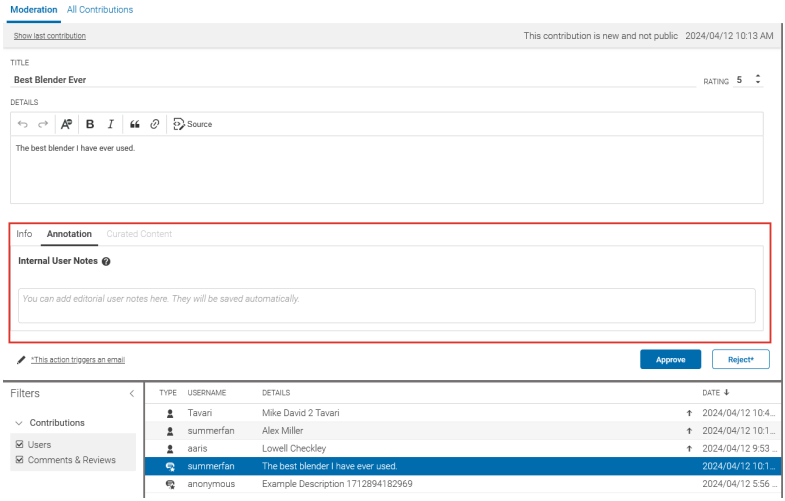


*Figure 8.9. The annotation field*

# 8.1.10 Browse and Search all Comments

Comments that you have moderated are removed from the Moderation View, but you can browse through all comments (1), moderated and not moderated (see Figure 8.10, “All comments view” [386]). Simply select the *All Comments* tab. The content of a selected comment is shown in the Preview (2).

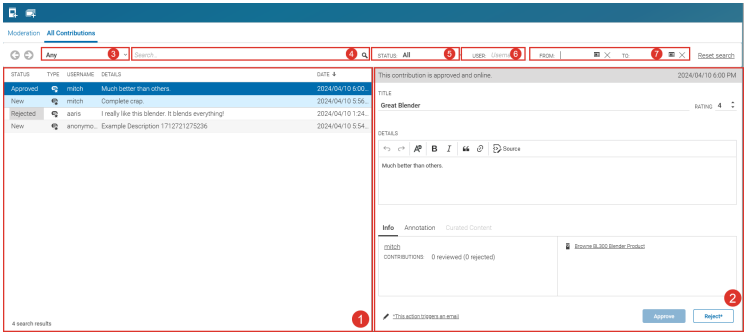


*Figure 8.10. All comments view*

## Search for Comments

You can search for specific comments using a full-text search with filters. Select the required filters:

- Comment type (3): You can distinguish between comments with uploaded images ("Comment with media"), without images ("Comment"), all comments ("Any") or reviews ("Review").
- Search term (4): Select comments only, that contain a specific word.
- Status (5): Distinguish between "New" comments that are not moderated yet, comments that are already "Approved", comments that have been "Rejected" or all comments.
- Username (6): Select comments of specific users.

# 8.1.11 Transfer Comments in the Repository

You can transfer the text or images of comments from the *Moderation View* into an Article or Gallery in the repository. If you select several comments at once, all text will be transferred into one Article.

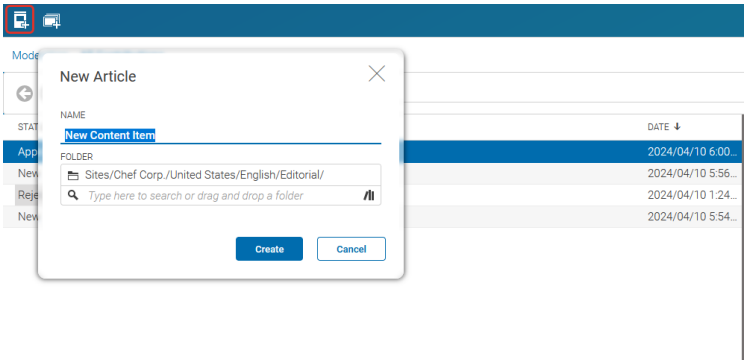


*Figure 8.11. Create Article from comments*

Proceed as follows:

1. Switch to the *All Comments* tab.
2. Select the comments you want to transfer.
3. Click the *Create new Article* or *Create new Gallery* icon.

   A dialog box opens up.
4. Enter the name and folder of the Article or Gallery and click **[Confirm]**.

   The Article or Gallery will be created and opens up in the Form.
5. Edit the Article or Gallery and save it.

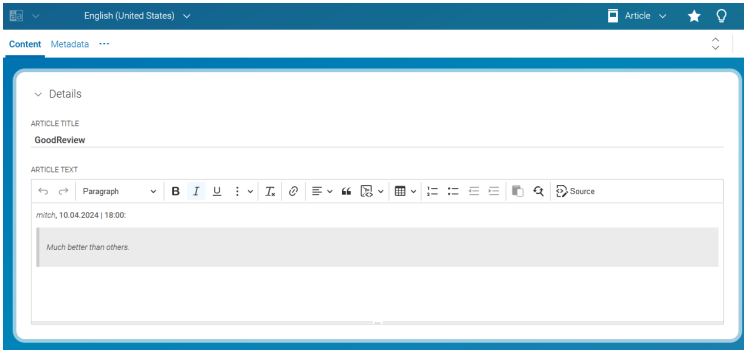


*Figure 8.12. Article created from the comment*

The new content item is not linked to any Pages.

When a new content is created from a comment, the *Curated Content* tab in the *Moderation View* gets enabled. Switch to this tab to display a list of all curated content, created from this comment as described in Section 8.1.7, “Opening Corresponding Contents” [383].

# 8.1.12 Preview Integration

Moderating comments is supplemented by the *CoreMedia Studio*'s preview integration in two ways.

When a comment is selected in the *Moderation View*, the corresponding comment is highlighted in the content preview as shown in Figure 8.13, “Comment highlighting in the preview” [388].

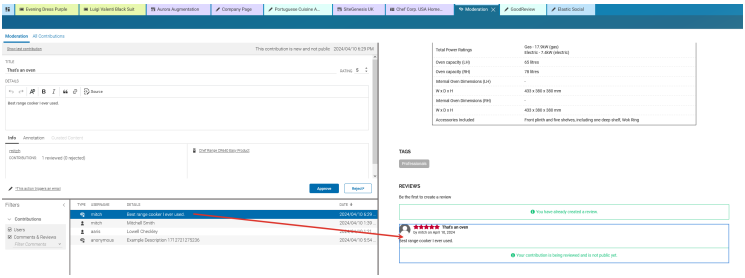

*Figure 8.13. Comment highlighting in the preview*

Whenever the Studio's preview shows a content item with comments, it is possible to open a context menu on a comment via a mouse right-click as shown in Figure 8.14, “Comment highlighting in the preview” [388]. For once, The context menu allows you to open the comment in the *Moderation App* (more specifically, in the *All Contributions View*). Additionally, it is possible to apply a quick way of moderation by directly approving or rejecting the comment without having to open the *Moderation App*.

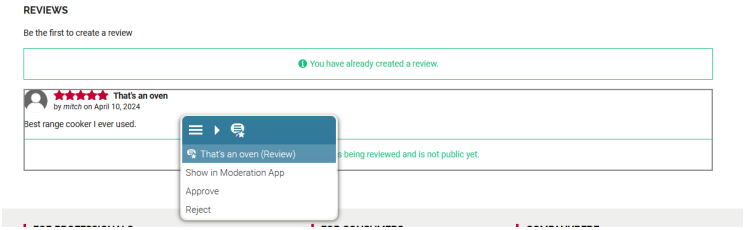


*Figure 8.14. Comment highlighting in the preview*

# 8.2 Working with Users

Users can create a profile on the website. The editor can moderate this profile from the *Moderation View* and the *User Management View*. Figure 8.15, "User Profile View" [389] shows the different sections of the *User Profile View*.

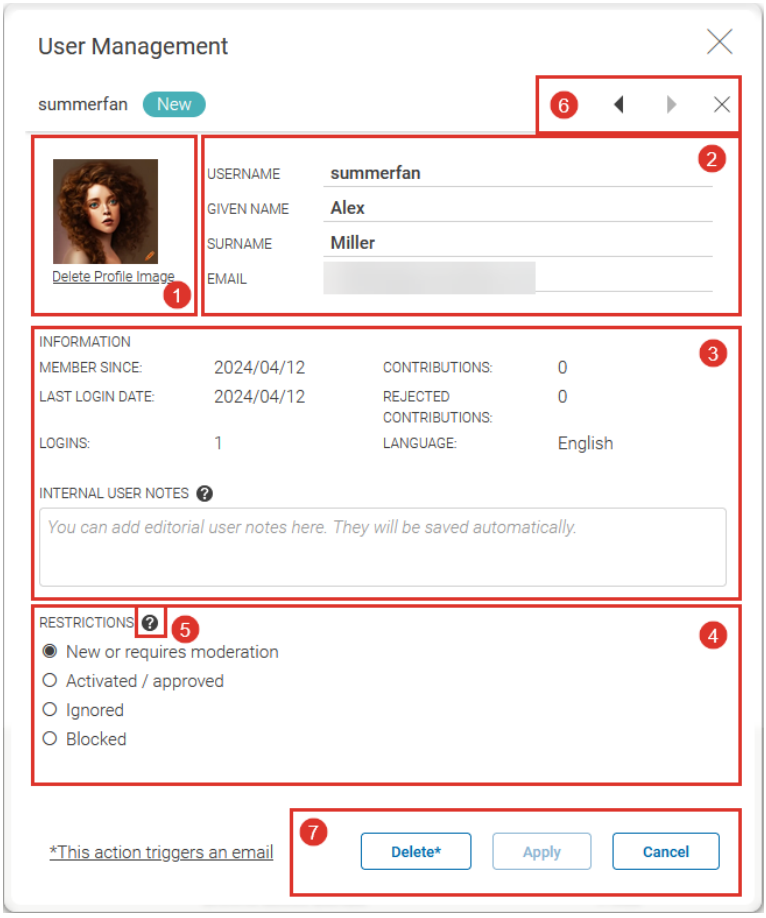


*Figure 8.15. User Profile View*

- (1) Image of the user profile.
- (2) User details with the email address to which notifications are sent.

- (3) Data about the user allows you to determine how active a user is and how reliable. The language determines the language of notification emails for this user.
- (4) Status of the user
- (5) Help information about the moderation actions.
- (6) Navigation buttons to browse through search results.
- (7) The buttons to delete a user, to apply the changes or to leave the window without changes.

# 8.2.1 Opening a User Profile

There are two ways to open a user profile:

- from the Moderation View
- from the User Management View

## From the Moderation View

If you work in the Moderation View and want to check the profile of a user you are currently working with, simply click the user name link in the comment view to open the users profile.

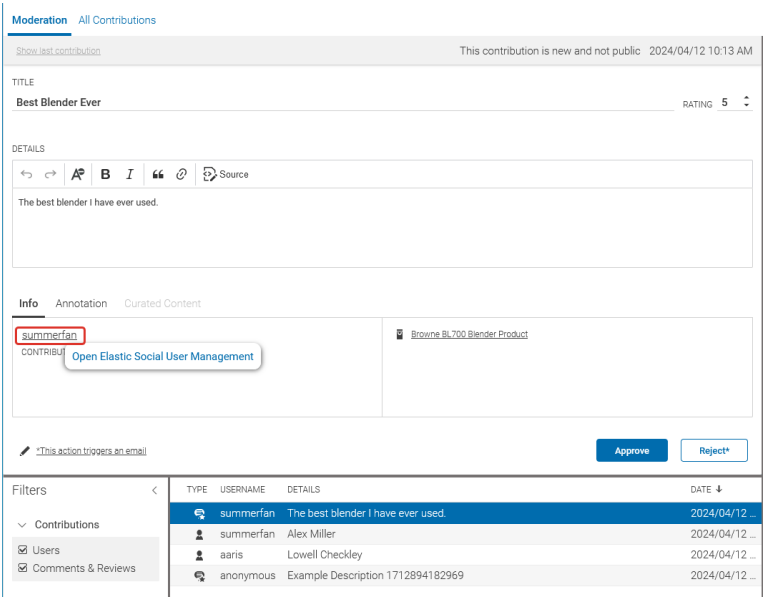


*Figure 8.16. Open user profile from the Moderation View*

# From the User Management

If you want to open the profile of a specific user proceed as follows:

1. Open the Main menu and select **User Management**.

   The search window appears.
2. Start typing your search term into the search bar.

   The full text search considers user name, given name and surname and email address. You will get suggestions for your search with the number of results shown in parentheses.

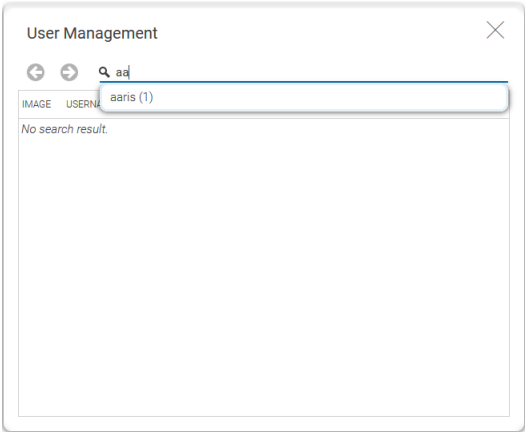


*Figure 8.17. Search window with suggestions for your search*

3. Select one of the suggestions and press **Enter**.

   The search window shows the results:

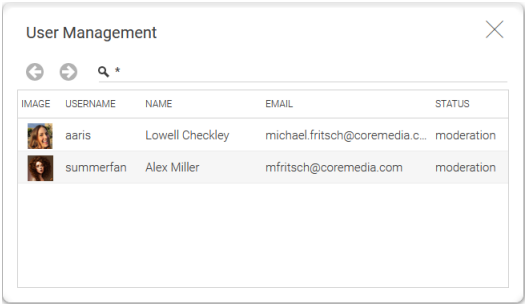


*Figure 8.18. Results of the search*

4. Double click the profile you want to see.

   The profile window opens and shows the data of the selected user.

# 8.2.2 Editing a User Profile

Editing user profiles mostly means to change their status. The *Elastic Social Studio Plugin* differentiates between four states.

| | |
|---|---|
| **Activated, approved** | The user has been moderated by a moderator and is allowed to write, complain and rate. |
| **New or requires moderation** | The user has created an account, can write, complain and rate but was not approved by a moderator. |
| **Ignored** | Any comment of the user is rejected without notice. Older, approved comments are not affected. Only the user sees his comments. |
| **Blocked** | The user can not login anymore and therefore can not create new comments. Older, approved comments are not affected. Nevertheless, a blocked user can always comment as an anonymous user or register again. If you block users, they will get a notification by email explaining that they've violated the community policy. |

If you delete, block, reset a user or change a user profile, a notification email is sent to the user. You can edit the default emails.

## Approving a user

A user with state "New" will be shown in the Moderation View. Click **[Approve]** in order to approve the user. You can add information about this user to the *Annotation* tab below the user's data.

If a user is in the state "Blocked" or "Ignored" you have to open the user profile in the *User Management* window. Select *Activated, approved* and click **[Apply]** . The user is now approved. No notification will be sent.

## Editing a user profile

You can edit a user profile in the *Profile View*.

1. Open the profile in the *Profile View*.
2. Make your changes
3. If you want to edit the email that is sent to the user, click **[email]** .
4. Click **[Apply]** to confirm the change.

The profile has been changed and an email has been sent to the user.

## Resetting a user

If a user profile has already been approved and the user has changed some profile data, you want to reset the profile to the last approved version. If this older version exists, the **[Reject]** button in the *Moderation View* will show "Reset".

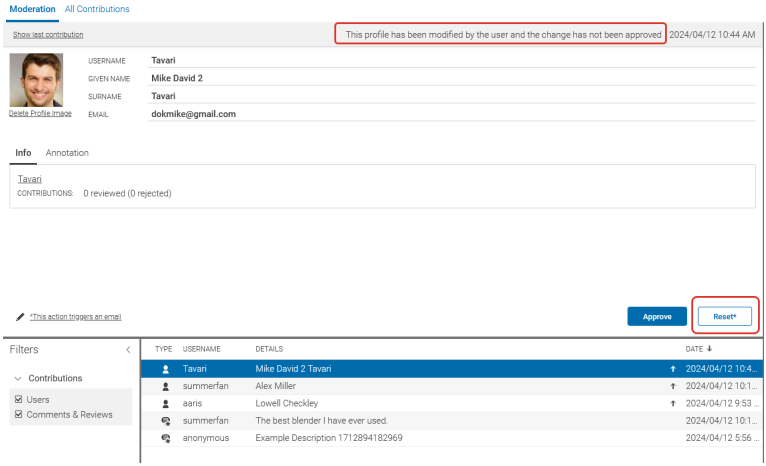


*Figure 8.19. Reset the profile*

1. Click **[email]** if you want to edit the notification email and select *Restoring-Mail*.

   A window opens up, where you can edit the email. Click **[Apply]** to apply your changes.
2. Click **[Reset]** in order to restore the profile.

   The profile is reset and an email is sent to the user.

## Ignoring a user

In order to ignore a user open the *User Management* window. Select *Ignored* and click **[Apply]**. The user will get no notification.

## Blocking a user

In order to block a user proceed as follows:

1. Open the *User Management* window.

2. Select *Blocked*.
3. If you want edit the email that is sent to the user click **[email]** and edit the Mail.
4. Click **[Apply]** to confirm the change.

The user is now blocked and will get a notification email.

## Deleting a user

You can delete users completely from the system.

1. Select the user profile in the *Moderation View* or in the *User Management View*.
2. Click **[email]** if you want to edit the notification email and select *Deleting-Mail*.
3. Click **[Delete]** .

   A confirmation window opens up.
4. Click **[Confirm]** .

The user is now deleted. Keep in mind that the users are deleted, but their contributions are still visible under the user name "anonymous".

CAUTION

User contributions can contain personal data or can even be classified as such themselves. Depending on your implementation and on applicable legal regulations, it may be necessary to review user contributions as well as curated editorial content derived from such user contributions to find and remove personal information in the comment / review / article text, or to delete them. This is an editorial duty that can be carried out using *CoreMedia Studio* tools before the deletion of the user (see Section 8.1.10, “Browse and Search all Comments” [385]).

## Editing emails

You have two possibilities to edit the default emails:

- Edit the current email you want to send
- Edit the template for all emails of a type (see Section 3.3.15, “Editing Mail Templates” [97] for details)

### Editing the current email

In order to edit only the email you want to send now, proceed as follows:

1. Click **[email]** in the *Moderation View* or *User Management View*.

   The email window appears. There may be more email types to choose from, depending on the possible actions.
2. Select the type of email you want to send in the *Possible Emails* field.
3. Edit the email.
4. Click **[Apply]** to save your change.

The change will be stored as long as you do not leave the *User Management View* or switch to another user or comment.

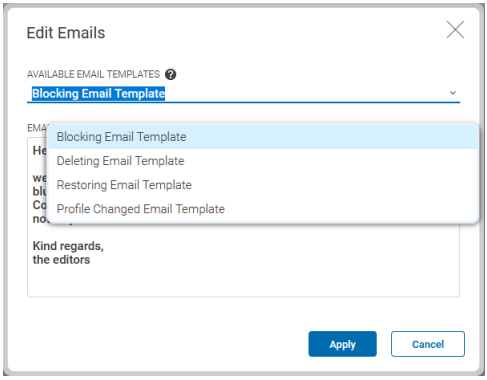


*Figure 8.20. Editing the current email*

## 8.2.3 Prioritize Users

If you want to see user profiles at the top of the *Moderation View* hover over a user profile in the comment and users list and click the ↑ icon.

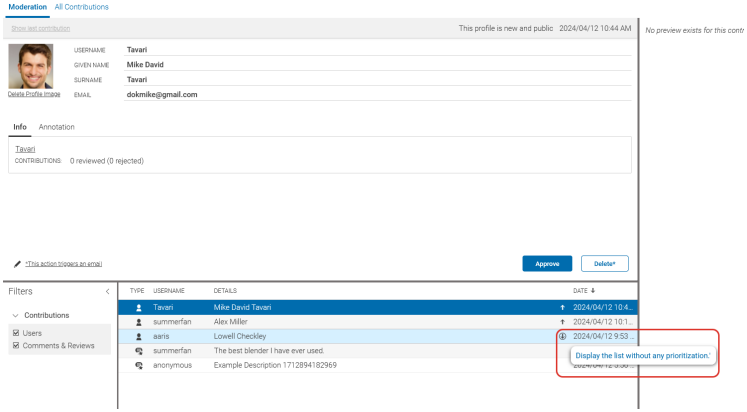


*Figure 8.21. Prioritize Users*

NOTE

Prioritize users will prioritize all user profiles and not only the user at which you clicked the **[Prioritize Users]** icon.

# 9. Reference

In the reference you will find the following information:

- Section 9.1, “Content Types” [399] shows you the predefined content types used in *CoreMedia Content Cloud*.
- Section 9.2, “Conditions” [404] gives you an introduction into the creation of conditions and lists the predefined conditions in *CoreMedia Content Cloud*.

# 9.1 Content Types

This section describes the content types that are part of *CoreMedia Blueprint*. Table 9.1, "Content types of CoreMedia Blueprint" [399] shows all content types that you can use.

| Content Type | Aim | Description |
|---|---|---|
| 360°-View | Content | A `360°-View` content item contains a sequence of images (typically for one product) which can be rotated by a website user to have a view around the product. |
| Action | Layout | Acts as a placeholder in a page for functionality, such as search, log in or registration. |
| Article | Content | In an `Article` you will enter the text content of a website but it may also link to images and related content. |
| Asset Category | Asset Management | Defines categories for assets and is used in the Assets Download portal. |
| Audio | Content | In an `Audio` content item you can store sound. |
| Augmented Page | Commerce | You can use an `Augmented Page` to include a navigation from the commerce system. |
| Augmented Category | Commerce | You can use an `Augmented Category` to augment a category from the commerce system> with CoreMedia content. |
| Category | Corporate Catalog | A `Category` creates a hierarchy for products. |
| Collection | Content | A `Collection` groups several other content items that should be displayed together. `Query List` and `Gallery` are specific versions of a collection. |
| CSS | Layout | A `CSS` content item contains CSS (Cascading Style Sheets) definitions, which are linked to a page. |

| Content Type | Aim | Description |
|---|---|---|
| Customer Persona | Personalization | A `Customer Persona` defines the context of a test user for which an editor can preview the site. |
| Customer Segment | Personalization | A `Customer Segment` content item defines conditions for a customer segment. |
| Document Asset | Asset Management | A `Document Asset` content item contains the original version of a document asset with the associated rights information, a Word document for example, and renditions of this document for specific channels. |
| Download | Content | A `Download` content item contains content that can be downloaded by customers, a PDF form for example. |
| Dynamic Elastic Social List | Elastic Social | |
| Email Template | Elastic Social | An `Email Template` contains text that is used for emails that are sent to the user in the context of *Elastic Social*. |
| e-Marketing Spot | *HCL Commerce* | You can use an `e-Marketing Spot` to include an e-Marketing spot from the *HCL Commerce* Management Center. |
| External Link | Content | An `External Link` content item contains a link to an external location. It is mostly used as related content on the website. |
| Folder Properties | Navigation | `Folder Properties` are used to define the context of a Page. |
| Gallery | Content | A `Gallery` is like a `Collection` but specialized for images. |
| HTML Fragment | Content | |

| Content Type | Aim | Description |
|---|---|---|
| Image Map | Content | An `Image Map` contains an image with hot spots which link to other content. |
| Interactive | Content | An `Interactive` content item contains interactive content such as Flash files. |
| JavaScript | Layout | A `JavaScript` content item contains JavaScript code, which is linked to a page. |
| Layout Variant | Content | A `Layout Variant` content item defines a layout. It is linked to other content items and can be selected in these content items to change layout. |
| Location | Taxonomy | A `Location` content item holds the information about a location. |
| Page | Layout/Content | A `Page` content item defines which content is shown at which position of the web page. |
| Person | Content | A `Person` defines an author of some content, for example of an article. |
| Personalized Content | Personalization | `Personalized Content` shows predefined content depending on the context of the current user. That is, for example, different content for male and female users. |
| Personalized Search | Personalization | `Personalized Search` content item selects content depending on the context of the current user. That is, for example, when a user is interested in sports it selects content tagged with sports. |
| Picture | Content | A `Picture` content item contains an image and some more information about the picture. |
| Picture Asset | Asset Management | A `Picture Asset` content item contains content the original version of a picture asset with the associated rights information, a Pho- |

| Content Type | Aim | Description |
|---|---|---|
| | | toshop file for example, and renditions of this image for specific channels. |
| Product | Corporate Catalog | A `Product` contains information about products of your company. You can order products in categories using the `Category` type. |
| Product List | Commerce | You can use a `Product List` to show products from a category filtered by some properties. |
| Product Teaser | Commerce | A `Product Teaser` links to a product from the commerce system. |
| Query List | Layout/Content | A `Query List` content items can be used in places, where other content items, such as `Articles`, are used. The `Query List` selects content items that fulfill specific conditions and these content items are shown instead of the `Query List` itself. |
| Resource Bundle | Layout | Contains properties for localization. |
| Settings | Layout | A `Settings` content item contains Struct properties, which configure specific settings. |
| Site Indicator | Navigation | A `Site Indicator` content item marks the root page in a hierarchy. |
| Sitemap | Navigation | A `Site Map` content item marks the starting page for a sitemap. |
| Symbol | Layout | |
| Tag | Taxonomy | A `Tag` content item holds the information about a taxonomy key. |
| Teaser | Content | A `Teaser` content item contains a teaser text and links to a target when you click the teaser. |

| Content Type | Aim | Description |
|---|---|---|
| Technical Image | Layout | A `Technical Image` content item stores an image that can be used, for example, in CSS and JavaScript content items. |
| Template Set | Layout | Is used to upload an archive with FreeMarker templates. This way, you can use new templates without restarting the CAE. |
| Theme | Layout | Contains content (CSS, JavaScript…) for the look of a site. |
| Video | Content | A `Video` content item contains a video file and some describing text. It is similar to an `Article`. |
| Video Asset | Asset Management | A `Document Asset` content item contains content the original version of a video asset with the associated rights information and renditions of this video for specific channels. |

*Table 9.1. Content types of CoreMedia Blueprint*

# 9.2 Conditions

Conditions define when personalized content should be shown. A single condition represents a *logical statement* about the system, that can either be "true" or "false". Notice the following examples:

- "The current user's gender is 'male'"
- "Today is Monday"
- "The user has an *explicit interest* in sports"

Conditions appear in two larger contexts:

- Customer Segments
- Personalized Content

In both of them you want to make something happen ("display of a certain content" or "belonging to a customer segment") depending on special circumstances: These circumstances are specified by assigning a *logical combination of conditions*.

## Logical combination of conditions

The evaluation of a single condition alone is no big deal, since you only have one "question to answer". But the more conditions you combine, the more complex the *conditional expression* gets and therefore will be harder to understand.

## Basic operators

Have a look at the two ways to combine conditions:

| Logical Operator | Description | Example: Question? => Expression |
|---|---|---|
| **AND** | Expression is true when *both* operands are true | Is current user part of the 'teenage sportsmen' Customer Segment? => "User is younger than 20." **AND** "user has explicit interest in sports." |
| **OR** | Expression is true when *at least one* operand is true | Display the 'Join now' Teaser? => "Today is Monday." **OR** "It's earlier than 16:00 o'clock." |

*Table 9.2. Logical operators*

The quoted statements in the table above represent evaluated conditions that are either true or false.

## Constructing complex conditional expressions

**Evaluation order**

For the further reading, please consider this example *conditional expression* first:

```
a AND b OR c AND d
```

"a", "b", "c" and "d" being conditions (representing logical statements) are connected with the above mentioned logical operators. What is the *order of evaluation*?

The answer is simple: ***AND* is stronger** than *OR*, which means, that the evaluation order would implicitly be

```
(a AND b) OR (c AND d)
```

## Types of conditions

The condition types you can use in your selection rules, depend on the setup of your system. Some condition types might only be available when your system setup includes *CoreMedia's Social Software* or other customizations to your CoreMedia setup.

Most of the conditions can be used to separate groups of users in Customer Segments and to determine whether to display Personalized Content. The `Segment Condition` can only be used in Customer Segments.

Keep in mind, that the following types are general conditions types which need to be bound to concrete properties ("current user's date of birth" in a `DateCondition`, for example).

### Date Condition

Defines conditions on dates.

In the second input field you select a comparison operator from the drop down box. You can choose if the date is "before", "after" or "on" the date that you select in the third input field.

*Figure 9.1. Date condition example*

### Time Condition

Defines conditions on times.

In the second input field you select a comparison operator from the drop down box. You can choose if the time is "before", "after" or "on" the time that you select in the third input field.

*Figure 9.2. Time condition example*

### Date Time Condition

Defines conditions on combinations of date and time.

In the second input field you select a comparison operator from the drop down box. You can choose if date and time is "before", "after" or "on" the date that you select in the other fields. In the third input field you can enter the date. Open the calendar widget by clicking the calendar icon on the right side. Then choose a day by simply clicking on it: The calendar widget will close itself automatically after choosing a day. In the fourth field choose a time with the drop down box.

*Figure 9.3. Date and time condition example*

### String Condition

Defines a condition to compare string values.

In the second input field you select a comparison operator from the drop down box. You can choose if the string is lexicographically "less", "greater" or "equal" to the string that you enter in the third input field.

*Figure 9.4. String condition example*

### Enum Condition

Defines a condition to compare a property with a set of given values specified in an XML file.

In the second input field you select a comparison operator from the drop down box. You can choose if the enumeration is "less", "less than or equal to", "equal", "greater than or equal" or "greater" than the enumeration that you select in the third input field.

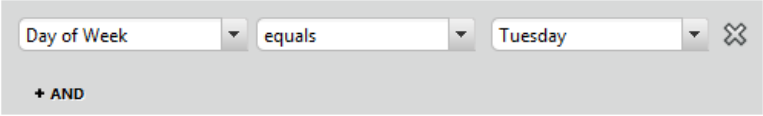


*Figure 9.5. `Enum` condition example*

### Segment Condition

The condition checks whether the current user belongs to a certain customer segment. It can only be used in customer segments.

In the second input field you select a comparison operator from the drop down box. You can choose if the user "is" or "is not" in the segment that you select in the third input field.

*Figure 9.6. Segment condition example*

### SFMC Journey Condition

The condition checks whether the current user is associated to a certain SFMC journey.

For the configuration of the feature read the section 'Upload Content to Salesforce Marketing Cloud' of the blueprint developer manual.

In the second input field you select a comparison operator from the drop down box. You can choose if the user "is" or "is not" associated to the journey that you select in the third input field.

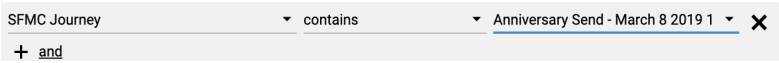


*Figure 9.7. SFMC Journey condition example*

### Commerce Segment Condition

eCommerce Connector specific feature

The condition checks whether the current user belongs to a certain commerce segment taken from the commerce system.

In the second input field you select a comparison operator from the drop down box. You can choose if the commerce segment "contains" the customer segment that you select in the third input field.

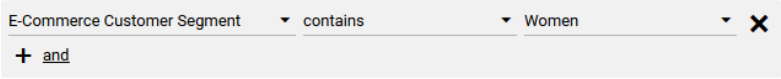


*Figure 9.8. Commerce segment condition example*

### Keyword Condition

The condition checks, whether the current user has clicked something related with a specified keyword *a certain number of times*.

In the second input field enter the keyword that is related to content clicked by the current user. In the third input field you select a comparison operator from the drop down box. You can choose if the number of clicks is "less than", "less or equal", "equal", "greater than or equal" or "greater" than the number of clicks that you enter in the fourth input field. This number will be compared to the current users click count on content, related with the specified keyword.

*Figure 9.9. Keyword condition example*

### Percentage Keyword Condition

This condition checks, whether the current user has clicked something related with a specified keyword *at a certain ratio* (10% of all clicks, for instance).

In the second input field enter the keyword that is related to content clicked by the current user. In the third input field you select a comparison operator from the drop down box. You can choose if the number of clicks is "less than", "less or equal", "equal", "greater than or equal" or "greater" than the number of clicks that you enter in the fourth input field. This ratio of clicks will be compared to the users click ratio as a "%" value between 0 and 100.

The meaning of the ratio depends on the configuration of your system!

*Figure 9.10. Percentage keyword condition example*

### Boolean Condition

This condition checks, whether a Boolean property is either "true" or "false".

Select "is" or "is not" which corresponds to "true" and "false" respectively.

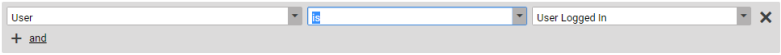


*Figure 9.11. Example of a Boolean condition*

# 10. Support

If *Studio* is not working as you expect it to, your first port of call should be your system administrator. This person is best placed to resolve local problems, such as may be caused by version conflicts between the programs you are using and your browser plugins, for example. In addition, your administrator can also contact CoreMedia Support and submit an error report.

If you have an account at CoreMedia, you can also contact Support directly or report your problem using the Support web page. Use the **About** menu (see Section 3.4, "Getting Technical Information" [102]) to gather information about your *Studio* installation that you can send to the support. Support can be contacted in the following ways:

*Support, Newsgroups*

## Online Support

Use our Online Support to submit a support ticket, track your submitted tickets or receive access to our forums. You can access our Online Support at:

https://support.coremedia.com/

## Access to online services

Partners and Support customers will need to register an account with CoreMedia in order to access the Online Support. Just send us an email and CoreMedia will send you your login details:

support@coremedia.com

If you have any other questions or comments, please contact:

CoreMedia GmbH

Altes Klöpperhaus, 5. OG

Rödingsmarkt 9

20459 Hamburg

Phone: +49 .40 .32 55 87 .777 Fax: .999

Our Support employees are available to take your support call weekdays between 9 a.m. and 6 p.m.

www.coremedia.com

support@coremedia.com

*Documentation*

Our manuals are continuously reviewed and revised in order to reflect new developments and insights gained from the day-to-day use of CoreMedia systems.

If you have comments or questions about our manuals,

- please email your inquiry to documentation@coremedia.com
- or fax it to 040-325587 999.

# Glossary

| | |
|---|---|
| Approve | *CoreMedia CMS* contains a Content Management Environment for content creation and management and a Content Delivery Environment for content delivery. Content has to be published from the Management Environment to the Delivery Environment in order to become visible to customers. Before content can be published, it has to be approved. This way, *CoreMedia CMS* supports the dual control principle. |
| Blob | Binary Large Object or short blob, a property type for binary objects, such as graphics. |
| Content Delivery Environment | The *Content Delivery Environment* is the environment in which the content is delivered to the end-user.<br><br>It may contain any of the following modules:<br><br>• *CoreMedia Master Live Server*<br>• *CoreMedia Replication Live Server*<br>• *CoreMedia Content Application Engine*<br>• *CoreMedia Search Engine*<br>• *Elastic Social*<br>• *CoreMedia Native Personalization* |
| Content item | In *CoreMedia CMS*, content is stored as self-defined content items. Content items are specified by their properties or fields. Typical content properties are, for example, title, author, image and text content. |
| Content Management Environment | The *Content Management Environment* is the environment for editors. The content is not visible to the end user. It may consist of the following modules:<br><br>• *CoreMedia Content Management Server*<br>• *CoreMedia Workflow Server*<br>• *CoreMedia Studio*<br>• *CoreMedia Search Engine*<br>• *CoreMedia Native Personalization*<br>• *CoreMedia Preview CAE* |

| | |
|---|---|
| Content Management Server | Server on which the content is edited. Edited content is published to the Master Live Server. |
| Content Repository | *CoreMedia CMS* manages content in the Content Repository. Using the Content Server or the UAPI you can access this content. Physically, the content is stored in a relational database. |
| Content Server | *Content Server* is the umbrella term for all servers that directly access the CoreMedia repository:<br><br>*Content Servers* are web applications running in a servlet container.<br><br>• *Content Management Server*<br>• *Master Live Server*<br>• *Replication Live Server* |
| Content type | A content type describes the properties of a certain type of content. Such properties are for example title, text content, author, ... |
| Control Room | *Control Room* is a *Studio* plugin, which enables users to manage projects, work with workflows, and collaborate by sharing content with other *Studio* users. |
| CoreMedia Studio | *CoreMedia Studio* is the working environment for business specialists. Its functionality covers all the stages in a web-based editing process, from content creation and management to preview, test and publication.<br><br>As a modern web application, *CoreMedia Studio* is based on the latest standards like Ajax and is therefore as easy to use as a normal desktop application. |
| Dead Link | A link, whose target does not exist. |
| Derived Site | A derived site is a site, which receives localizations from its master site. A derived site might itself take the role of a master site for other derived sites. |
| Elastic Social | *CoreMedia Elastic Social* is a component of *CoreMedia CMS* that lets users engage with your website. It supports features like comments, rating, likings on your website. *Elastic Social* is integrated into *CoreMedia Studio* so editors can moderate user generated content from their common workplace. *Elastic Social* bases on NoSQL technology and offers nearly unlimited scalability. |

| | |
|---|---|
| Folder | A folder is a resource in the CoreMedia system which can contain other resources. Conceptually, a folder corresponds to a directory in a file system. |
| Folder hierarchy | Tree-like connection of folders, where the root folder forms the origin of the tree. |
| Home Page | The main entry point for all visitors of a site. Technically it is often referred to as root document and also serves as provider of the default layout for all subpages. |
| IETF BCP 47 | Document series of *Best current practice* (BCP) defined by the Internet Engineering Task Force (IETF). It includes the definition of IETF language tags, which are an abbreviated language code such as en for English, pt-BR for Brazilian Portuguese, or nan-Hant-TW for Min Nan Chinese as spoken in Taiwan using traditional Han characters. |
| Locale | Locale is a combination of country and language. Thus, it refers to translation as well as to localization. Locales used in translation processes are typically represented as IETF BCP 47 language tags. |
| Markup | Marking of parts of a document, structurally (section, paragraph, quote, ...) or with layout (bold, italic, ...). |
| Master Live Server | The *Master Live Server* is the heart of the *Content Delivery Environment*. It receives the published content from the *Content Management Server* and makes it available to the *CAE*. If you are using the *CoreMedia Multi-Master Management Extension* you may use multiple *Master Live Server* in a CoreMedia system. |
| Master Site | A master site is a site other localized sites are derived from. A localized site might itself take the role of a master site for other derived sites. |
| MIME | With Multipurpose Internet Mail Extensions (MIME), the format of multi-part, multimedia emails and of web documents is standardised. |
| Personalisation | On personalised websites, individual users have the possibility of making settings and adjustments which are saved for later visits. |
| Projects | With projects you can group content and manage and edit it collaboratively, setting due dates and defining to-dos. Projects are created in the Control Room and managed in project tabs. |

| | |
|---|---|
| Property | In relation to CoreMedia, properties have two different meanings:<br><br>In CoreMedia, content items are described with properties (content fields). There are various types of properties, e.g. strings (such as for the author), Blobs (e.g. for images) and XML for the textual content. Which properties exist for a content item depends on the content type.<br><br>In connection with the configuration of CoreMedia components, the system behavior of a component is determined by properties. |
| Publication | Creates or updates resources on the Live Server. |
| Resource | A folder or a content item in the CoreMedia system. |
| Responsive Design | Responsive design is an approach to design a website that provides an optimal viewing experience on different devices, such as PC, tablet, mobile phone. |
| Root folder | The uppermost folder in the CoreMedia folder hierarchy. Under this folder, CoreMedia users can add further folders and content items. |
| Site | A site is a cohesive collection of web pages in a single locale, sometimes referred to as localized site. In *CoreMedia CMS* a site especially consists of a site folder, a site indicator and a home page for a site.<br><br>A typical site also has a master site it is derived from. |
| Site Folder | All contents of a site are bundled in one dedicated folder. The most prominent document in a site folder is the site indicator, which describes details of a site. |
| Site Indicator | A site indicator is the central configuration object for a site. It is an instance of a special content type, most likely `CMSite`. |
| Site Manager Group | Members of a site manager group are typically responsible for one localized site. Responsible means that they take care of the contents of that site and that they accept translation tasks for that site. |
| Teaser | A short piece of text or graphics which contains a link to the actual editorial content. |
| Translation Manager Role | Editors in the translation manager role are in charge of triggering translation workflows for sites. |

| | |
|---|---|
| Variants | The set of all content items in a multi-site hierarchy related to each other via master references. This includes the top-level master content items themselves. |
| Version history | A newly created content item receives the version number 1. New versions are created when the content item is checked in; these are numbered in chronological order. |
| Weak Links | In general *CoreMedia CMS* always guarantees link consistency. But links can be declared with the *weak* attribute, so that they are not checked during publication or withdrawal.<br><br>Caution! Weak links may cause dead links in the live environment. |
| Workflow | A workflow is the defined series of tasks within an organization to produce a final outcome. Sophisticated applications allow you to define different workflows for different types of jobs. So, for example, in a publishing setting, a document might be automatically routed from writer to editor to proofreader to production. At each stage in the workflow, one individual or group is responsible for a specific task. Once the task is complete, the workflow software ensures that the individuals responsible for the next task are notified and receive the data they need to execute their stage of the process. |
| Workflow Server | The *CoreMedia Workflow Server* is part of the Content Management Environment. It comes with predefined workflows for publication but also executes freely definable workflows. |
| XLIFF | XLIFF is an XML-based format, standardized by OASIS for the exchange of localizable data. An XLIFF file contains not only the text to be translated but also metadata about the text. For example, the source and target language. *CoreMedia Studio* allows you to export content items in the XLIFF format and to import the files again after translation. |

# Index

## Symbols

360°-View
edit, 231

## A

animated GIF, 207
Annotated Link List, 205
asset
create, 308
metadata, 308
rendition, 304
taxonomy, 314
thumbnail, 308
asset management, 69
assets
show in My Edited Content, 30
Augmented Category, 326, 336
eCommerce category, 336
Augmented Page, 326
authors, 238

## B

blacklist, 378
removing, 382
blocklist
adding, 382
Blueprint
layout, 18
layout variants, 18
navigation, 16
page grid, 19
bookmark, 245

## C

caching, 404
Commerce SegmentCondition, 407
DateCondition, 405
DateTimeCondition, 406
EnumCondition, 406
KeywordCondition, 408
PercentageKeywordCondition, 408
SegmentCondition, 407
StringCondition, 406
Time Condition, 406
catalog
find orphaned elements, 325
search, 321
catalog view, 327
enable, 327
category
augment, 348
hide from navigation, 367
ckeditor5
autoformat, 176
markdown, 176
clipboard, 177
comment, 377
approve, 379
edit, 381
prioritizing, 381
reject, 380
restore, 380
writing, 384
comments
sorting, 378
commerce
search, 329
complaints, 378
content
categorize, 239
creating, 145
inherit, 162
layout variant, 164
master, 62
moving, 157
Content App, 25
Main menu, 27
content item
compare, 269
content type
inheritance, 12
control room
localization, 30
open, 32
translation, 29-31, 274-275

CoreMedia Content Widget
content display, 346
CoreMedia Product Catalog, 321
create category, 321
create product, 322
CoreMedia Studio
start, 125
timeout, 125
Create from Template, 166
curated transfer, 379

## D

dashboard, 126
add, 126
open, 44
Data Privacy
Erasure, 395
Personal Data, 395
deleted content, 135
Download
filename, 151
dynamic content, 21
dynamic list
query list, 148
Top-N list, 233

## E

e-Marketing Spot, 326
e-Marketing spot, 337
eCommerce Connector, 326
Elastic Social, 376
configuration, 96
post-moderation, 96
premoderation, 96
settings, 96
email
when send, 393
external preview, 298

## F

field, **12**
(see also property)
field type, 13
focus point, 213
folder, 144
folder properties, 11
form, 383
close several, 173
full-text search, 131
Full-Text search, 134
filtering, 134

## H

hardware requirements
Studio, 78
Header Bar, 27
hide studio forms, 115
reset, 117
home folder, 12

## I

image
focus point, 213
image editing, 207
crop, 211
image map editing, 221
images, 206
In-App Guide Portal, 70
inherit, 162
IPTC, 306

## L

library, 38
open, 38
link, 183, 191
weak, 10
link list, 201
Link List
annotated, 205
linking content, 141
list
indent, 180
locale, 62
localization, **259**
disable updates, **260**

## M

Main menu, 27
markdown, 176
master content, 62
metadata, 239, 306
multi-site, **61**
derive, 62

## N

nagbar, 298
navigation
  adding node, 165
  hiding pages, 17
  order, 16
  unique URL segment, 165

## P

Page
  Create from Template, 166
  creation, 165
  dialog, 145, 165
  purpose, 146
  tabs, 146
page grid
  create, 20
  edit, 163
  incompatible changes, 163
  placement, 19
  preview, 163
Personal Data, 395
placement
  inherit, 20, 162
  locking, 20, 161
pop-up blocker, 80
post-moderation, 96, 378
preferences
  site, 88
preferred site, 61, 88
premoderation, 96, 377
Preview, 25
preview
  zoom, 28
prioritize, 378
Product Asset Widget
  configuration, 356
product code
  set, 306
product list, 334
Product Teaser, 326
product teaser, 332
  overwrite, 332
product variants, 330
  search for, 330
production environment, 9
profile view, 389
project
  calendar, 291
  due date, 286
property, 12
publication, **247**
Publication window, 40
publish, **247**

## Q

Query List, 148
Quick Create
  default folder, 98
Quick Search, 129

## R

recycle bin, 160
  restore, 160
rendition, 304
review, 377
rights, 51
root page, 17

## S

search
  catalog, 321
  in trash, 135
  issue, 135
  rich text, 191
Search Folder, 137
selection frame, 209
semantic search, 131
settings, 96
side-by-side view, 269, 271
site
  derive, 62, 264, 279
  locale, 62
  preferred, 61
  preferred site, 88
  site folder, 62
  site indicator, 61
  site manager group, 264, 279
  sites window, **63**, 263, 265, 279
site indicator, 17
site structure, 15
sitemap
  creation, 168
spellchecker, 79
struct, 194

Struct
context menu, 196
Struct editor
create list entries, 200
duplicate entry, 201
icons, 195
list property, 195
single property, 195
Studio
Content App, 25
hardware requirements, 78
Workflow App, 47
suggestion mode, 241
synchronization, **277**
synchronized site
icon, 62

## T

table, 185
tag chooser, 241
taxonomy editor, 243
teaser, 22
overwrite, 332
timeline, 232
to-do
delete, 293
filtering, 292
Top-N lists, 233
topic page , 154
context, 154
custom context, 156
linked, 155
taxonomy, 154
tracking, 120
translated site
icon, 62
translation, **261**
library translation state, 266
locale switcher, 267
state dashboard widget, 265
workflow, 29-31, 59, 269, 274-275
XLIFF, 261, 272
trash
search in, 135
tree panel, 139

## U

upload
Word file, 151
Upload Content SFMC, 300
Use Original Image, 208
user
moderate, 392
restore, 380
User Interface, 25
User Manager
rights, 51
user profile
open, 390

## V

video, 231
shoppable, 231
timeline, 232

## W

weak link, 10
widget
refresh, 127
withdrawal, 9
workflow
translation, 29-31, 59, 269, 274-275
Workflow App, 25, 47
Workflow Validation, 91
WorkflowValidation, **91**
disabled, **92**
localization, **93**
limitForDependentContentItems, **93**
maxDepthToCompleteChangeSet, **94**
publication, **94**
maxDepthToCompleteChangeSet, **95**
maxUpdatedLinksDepthToCompleteChangeSet, **95**

## X

XLIFF, 261, 272
XML Localization Interchange File Format, 261, 272