CoreMedia Digital Experience Platform 8
//Version 7.5.45-10

CoreMedia Studio User Manual

CoreMedia Studio User Manual

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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*.

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* [57] describes some administrative tasks that you have to do.
- Chapter 4, *Working With Content* [68] shows you how to work with *CoreMedia Studio* content.
- Chapter 5, *Working with Assets* [202] shows how to work with picture assets.
- Chapter 6, *Working with Product Catalogs* [221] shows how to work with the internal CoreMedia catalog and with external e-Commerce catalogs.
- Chapter 7, *Working with Personalized Content* [262] 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* [286] shows how to work with user-generated content, comments, likes, user profiles, for instance.
- Chapter 9, *Appendix* [307] gives an overview over the default content types and condition types used in *CoreMedia Digital Experience Platform 8*.

1.1 Audience

This manual gives users of *CoreMedia Studio* 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 Digital Experience Platform 8 is a modular system where most of these modules add functionality to *CoreMedia Studio*. Nevertheless, the system you are working with might not contain all the modules 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.

Modules are:

- *CoreMedia Elastic Social*: Adds functionality for user generated content (comments, likes ...) and external user management. See Chapter 8, *Working with User Generated Content* [286] for the functionality.
- *CoreMedia Adaptive Personalization*: Adds functionality for personalized content with user segments or personas. See Chapter 7, *Working with Personalized Content* [262] for the functionality.
- *CoreMedia Blueprint*: Combines all modules and adds functionality such as easy creation of content.

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:

Table 1.1. Typographic conventions

Element	Typographic format	Example
Source code Command line entries Parameter and values Class and method names Packages and modules	Courier new	`cm systeminfo start`
Menu names and entries	Bold, linked with |	Open the menu entry **Format|Normal**
Field names CoreMedia Components Applications	Italic	Enter in the field *Heading* The *CoreMedia Component* 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 \` `-u user`
Mention of other manuals	Square Brackets	See the [Studio Developer Manual] for more information.

In addition, these symbols can mark single paragraphs:

Table 1.2. Pictographs

Pictograph	Description
	Tip: This denotes a best practice or a recommendation.
	Warning: Please pay special attention to the text.

Pictograph	Description
	Danger: The violation of these rules causes severe damage.

1.4 Change record

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

Table 1.3. Changes

Section	Version	Description
Section 2.3, "Content and Site Model" [15]	7.5.12	Added new chapter about the content model.
Section "Selecting a Workspace" [229]	7.5.19	Added description of workspace selector.
Section 6.2, "Working with e-Commerce Content" [227]	7.5.19	Added description of content creation for product detail pages and category overview pages.
Section 8.1.2, "Filtering the List of Moderated Items" [289], Section 3.2.7, "Configuring Available Comment Categories" [64]	7.5.20	Added description of comments filtering.
Section 2.7, "Notifications" [41]	7.5.25	Added a new section about notifications.
Section "Adding Members to a Project" [191]	7.5.25	Modified sharing of content sets with selected users and groups.
Section 6.2.3, "Adding CMS Content to Your Shop" [237]	7.5.27	Changed structure of chapter and added description of CoreMedia Asset Widget.
Section 4.7.4, "Working With Projects" [188] Section 2.4.3, "Projects" [30]	7.5.33	Added description of projects
Book	7.5.37	Moved some subsections to chapter level
Chapter 5, *Working with Assets* [202] Section 2.14, "Asset Management" [56]	7.5.37	Added chapter and section about asset management
Chapter 4, *Working With Content* [68]	7.5.37	Moved sections to main position in toc
Section 6.2.3, "Adding CMS Content to Your Shop" [237]	7.5.37	Added new information for augmentation

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 Studio* and *CoreMedia CMS*. 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” [15] 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” [39] gives a brief introduction to the permissions system used by *CoreMedia Studio*.
- Section 2.6, “Versions” [40] describes how versions of content items are managed.
- Section 2.8, “Validators” [42] describes validators, which ensure that all relevant properties of a content item are filled by the editor.
- Section 2.9, “Workflows” [44] describes the usage of workflows for publication and translation.
- Section 2.10, “Multi-Site and Multi-Language” [48] describes how multiple sites in multiple languages are supported in *CoreMedia Studio*
- Section 2.11, “Personalization” [51] describes the basics of conditional content which can be used to show content depending on specific conditions, for example in *Adaptive Personalization*
- Section 2.12, “Elastic Social” [321] gives a short overview over *Elastic Social* features.

- Section 2.13, “Product Catalogs” [54] gives a short overview over the integration of commerce content into *Studio*.
- Section 2.14, “Asset Management” [56] gives an overview over the management of assets in *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].

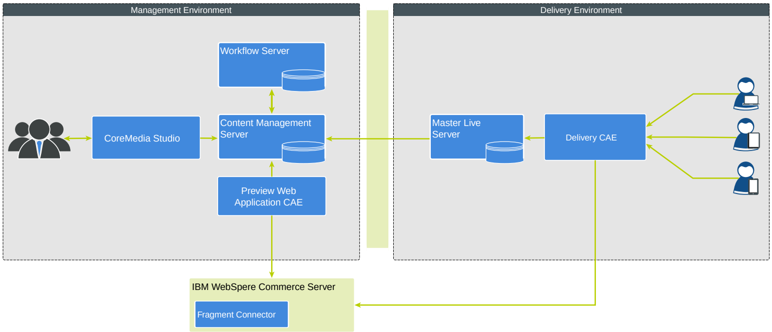


Figure 2.1. Architecture of a CoreMedia CMS system

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” [166]). 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” [166]).

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 DXP 8* 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” [15] and Section 9.1, “Content Types” [308] 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.

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, but that the included documents are shown up in search query results.

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 CMS* 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 2.2, “Collection and its subtypes in search results” [12]).

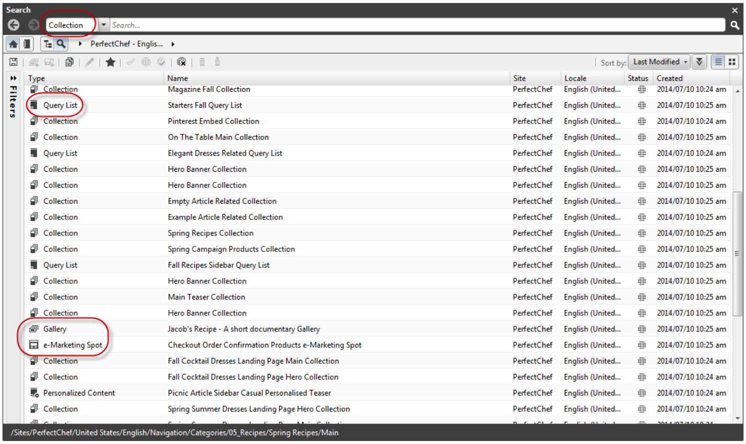


Figure 2.2. Collection and its subtypes in search results

For details about the included content types see Section 9.1, “Content Types” [308] and Section 2.3, “Content and Site Model” [15].

Figure 2.3, “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.

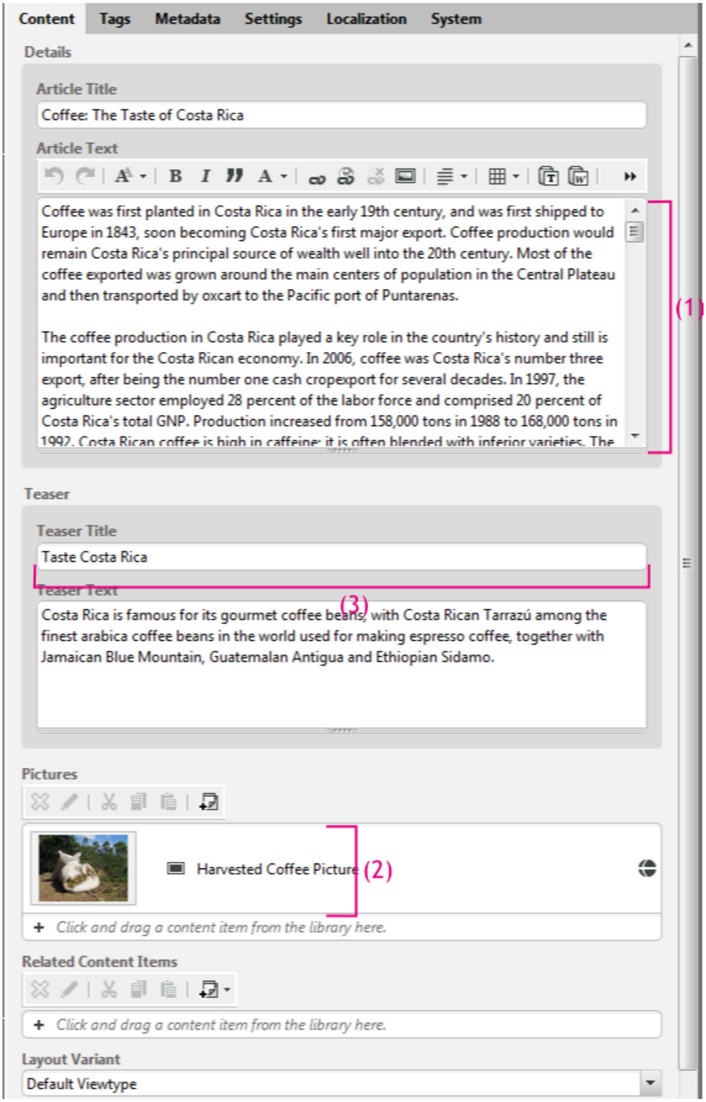


Figure 2.3. The Article content item in Studio

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

- (1) Formatted text 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 Digital Experience Platform 8 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” [308] 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.

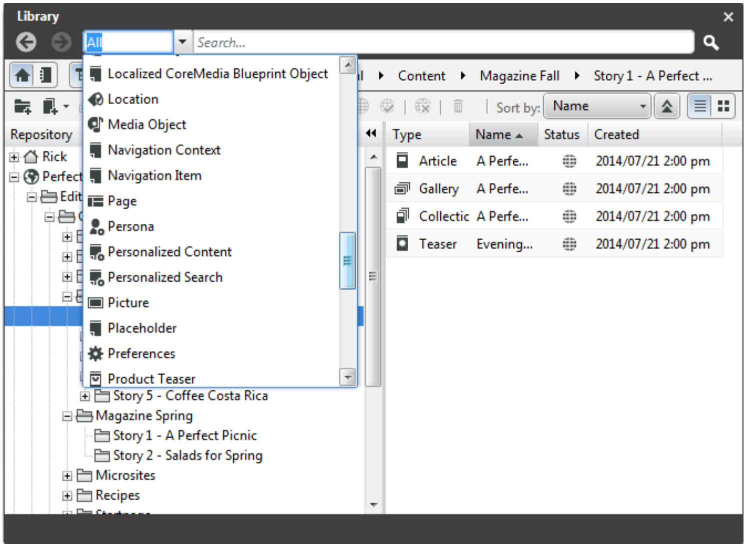


Figure 2.4. Content type chooser in the library

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:

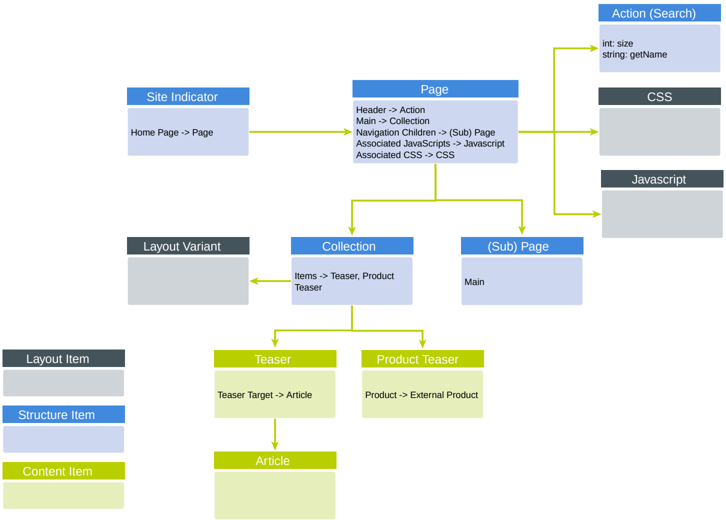
The content types (Action, Placeholder) you can use to add interactive functionality such as search or login to your website.

The following subsections describe these task in more detail.

2.3.1 Simple Example Website Structure

Figure 2.5, “Simplified site structure” [16] 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 2.5. 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 2.6, “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 e-Commerce system.

There are many more content types involved to create a comprehensive website. See Section 9.1, “Content Types” [308] for an overview.

2.3.2 Structure of a Website

All content of a specific website in *CoreMedia DXP 8* is located below the same folder. The English Perfect Chef website of the example content, for instance, lies in `CMS/All Content/Sites/Perfect Chef/United States/English`. Below this location is another folder `Navigation` which contains the content items that constitute the navigation structure.

The navigation structure is built from `Page` contents that reference their children pages or `Augmented Page` items (see Figure 2.6, “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 CMS* 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.

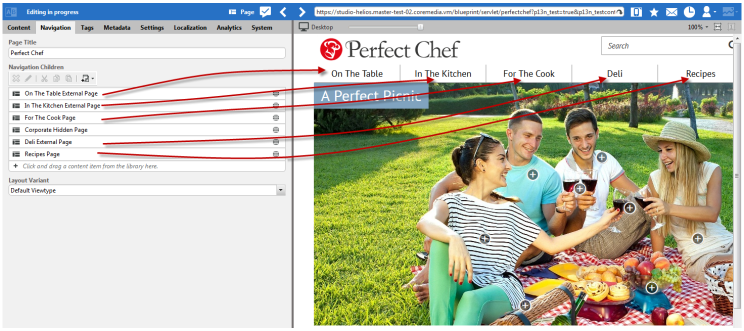


Figure 2.6. Navigation Children and navigation on page

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” [104].

In Figure 2.6, “Navigation Children and navigation on page” [17] you see that the Navigation Children "On The Table", "In The Kitchen", "For The Cook, "Deli", "Recipes" and "Magazine" are shown in the main Navigation of the example page but you do not want to show "Corporate Hidden Page".

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 `Navigation` folder of the site and have a look at the *Home Page* field (see Figure 2.7, “Site Indicator linking to the root page” [18].

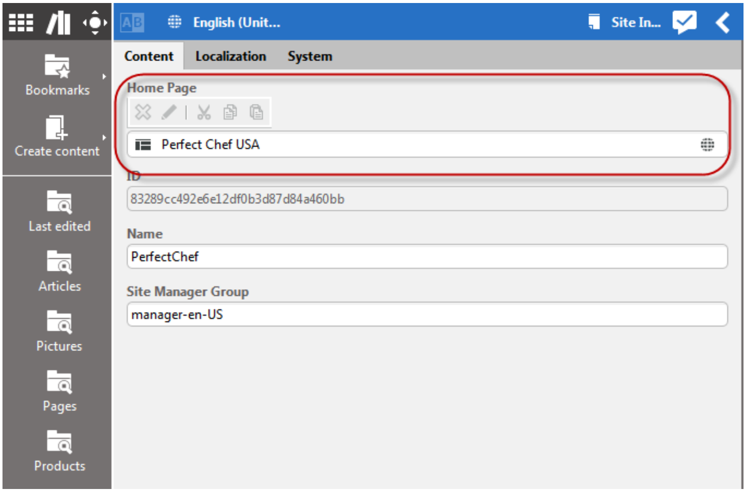


Figure 2.7. Site Indicator linking to the root page

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 micro site for instance.

With *CoreMedia DXP 8* 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 2.8, “Different layout variants of the same Collection” [19], shows an example.

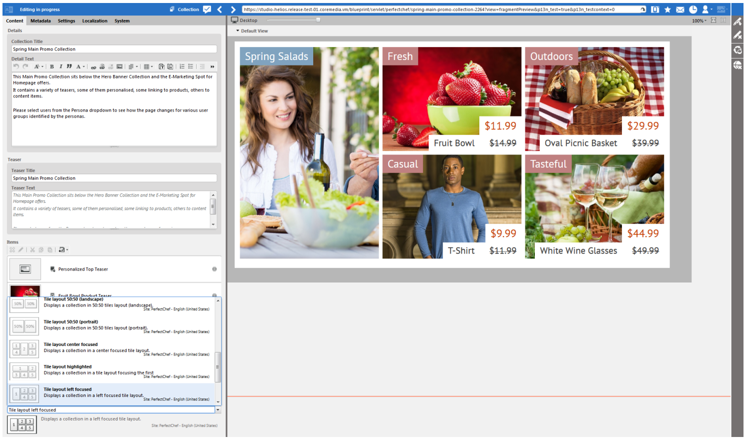


Figure 2.8. Different layout variants of the same Collection

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 DXP 8* comes with several predefined page grids, for example a 2-column layout, a 3-column layout or a 2-column layout with headline. You can edit the content for a page grid with the page grid editor. Figure 2.9, "Different page grids with the page grid navigation shown in the preview" [20] shows different page grids for a Page. Read Section "Editing a Page Grid" [96] 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 2.8, "Different layout variants of the same Collection" [19] shows different layouts for a collection.

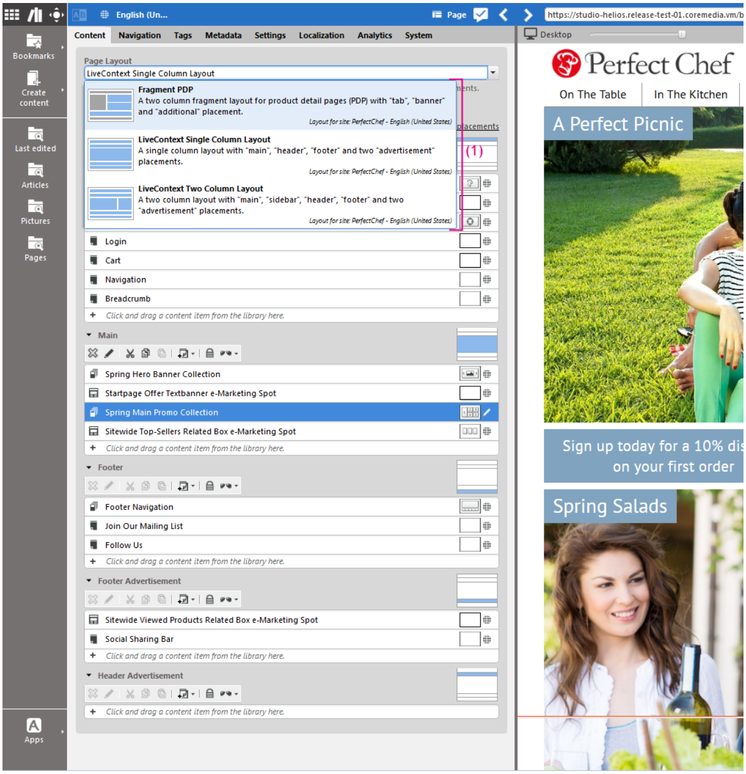


Figure 2.9. Different page grids with the page grid navigation shown in the preview

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 sub pages are not allowed to change the content defined in a parent page and inheritance means that a sub page reuses the content of the parent page.

For locking and inheritance, sub pages 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.

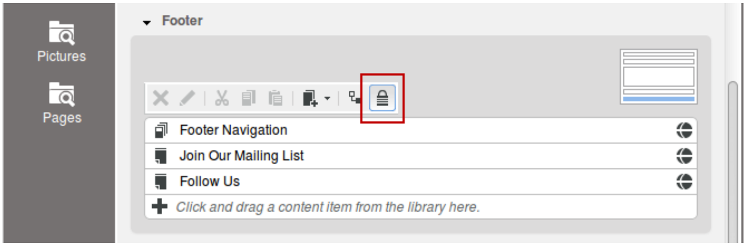


Figure 2.10. Locked Footer Bar

Style your website

CoreMedia DXP 8 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 DXP 8* 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 e-Commerce 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 4.6.11, "Editing Top-N Lists" [152]) or the Content Queries from *CoreMedia Blueprint* (see Section "Creating Content Queries" [89]).

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, for example, an Article in teaser position, then the teaser will always link to this article. To create different teasers to the same content, *CoreMedia DXP 8* has a specific `Teaser` content type. `Teaser` content has again a `Teaser Title`, `Teaser Text` and `Pictures` but also `Teaser Target` field which holds the link target of the teaser.

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 2.11, "Tile layout of a collection" [22] shows the content of a `Collection` in a simple tile layout.

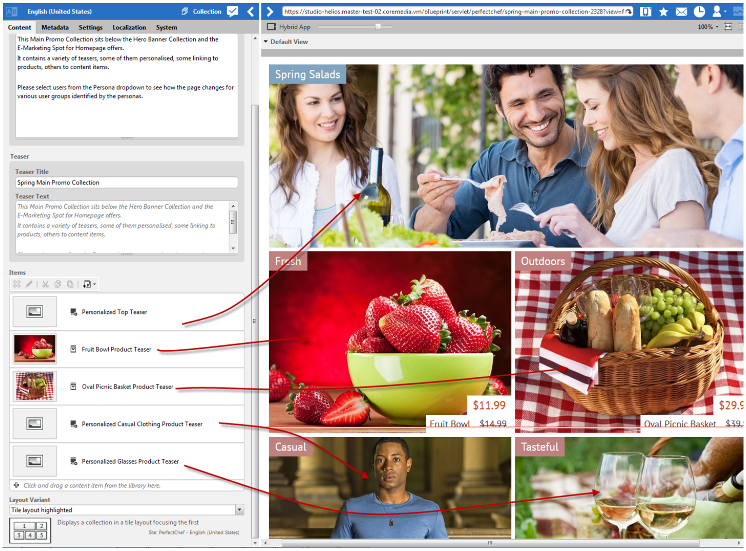


Figure 2.11. Tile layout of a collection

CoreMedia DXP 8 comes with different collection types for different grouping use cases.

Content types for grouping

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 DXP 8* 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` document, but the most natural locations are the headers and footers of a page as shown in Figure 2.12, "Action items in a page" [24]. To place these function blocks, *CoreMedia DXP 8* 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.

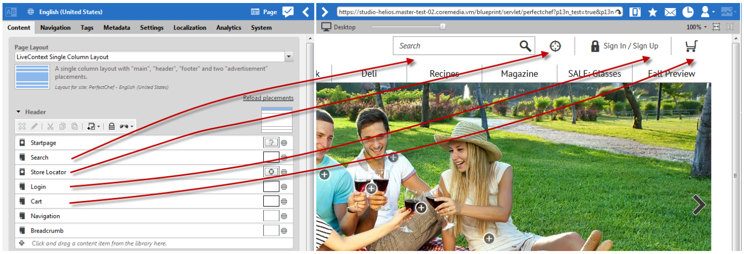


Figure 2.12. Action items in a page

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 Overview Window with the Control Room and the Library. In addition, the Dashboard gives you an overview over your work and the Publication Window opens up if publication problems have occurred.

2.4.1 Workspace

The Workspace is your main working screen. 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 a floating mode (default for the Library). Docking is available on the left side next to the Favorites Toolbar and on the right side next to the Actions Toolbar and is indicated when the dividing line changes its color to blue. 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.

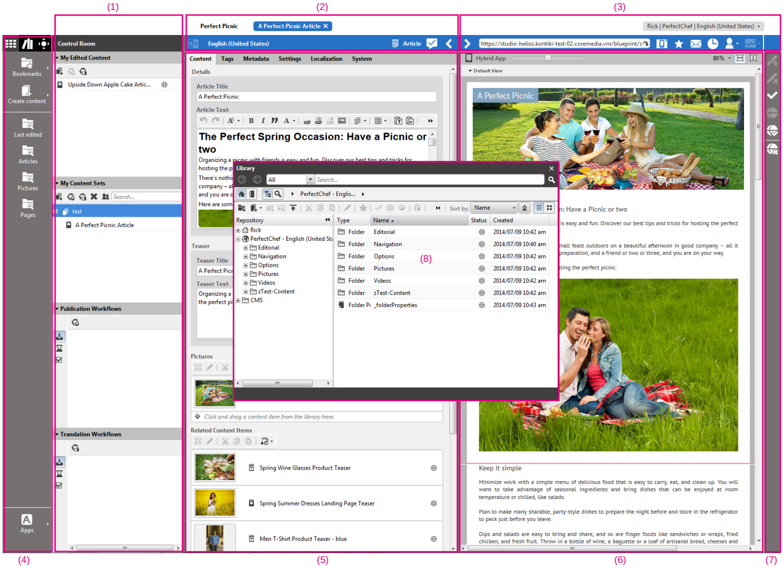


Figure 2.13. The workspace

The Workspace consists of a number of different functional components:

- (1) Control Room
- (2) Form Toolbar
- (3) Preview Toolbar
- (4) Favorites 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 Overview Window:

Table 2.1. Key icons in the Overview Window

Icon	Name
	Dashboard
	Library
	Control Room
	Search folders
	Create Content
	Apps

Control Room

You manage your current projects and workflows in the Control Room (see Section 2.4.2, "Control Room" [29]). You find all content items you have currently edited, you can create and manage projects and use them to start workflows.

Form Toolbar

The Form Toolbar presents you with information about the current state of the content item. If you hover the mouse cursor over the *Information* icon, you will receive more precise details of this description. 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.

Favorites Bar

You can use the Favorites Bar to open the Library, the Dashboard and the Control Room. In addition you can use predefined searches (see Section 4.3.3, “Using Search Folders” [75]) and in *Blueprint* the create content menu. At the bottom of the favorites bar you find the Apps 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 3.2.4, “Disabling the Auto-Hiding of Form Tabs” [62]). 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.

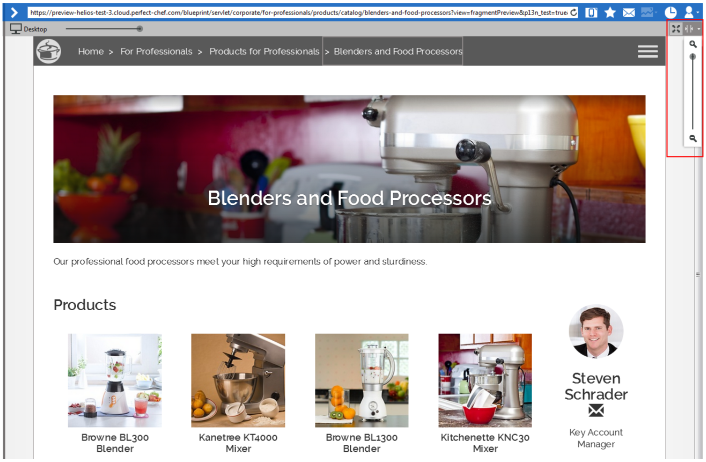


Figure 2.14. Zooming in the Preview

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

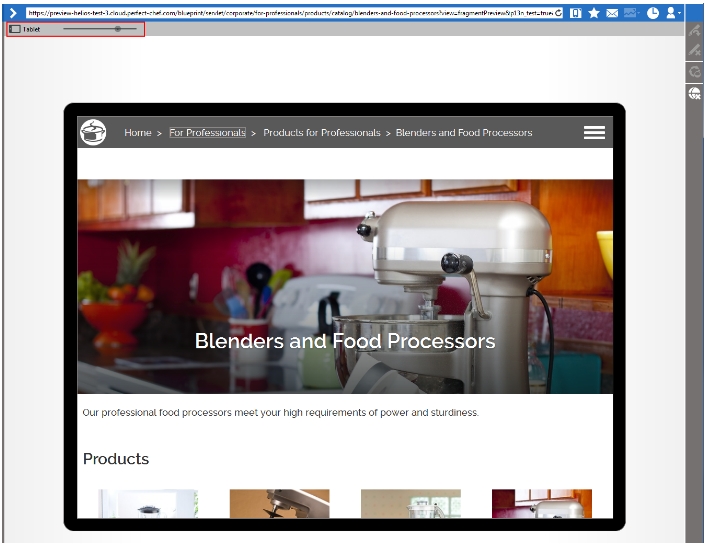


Figure 2.15. Adapt the Preview for different devices

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 2.15, “Adapt the Preview for different devices” [28].

2.4.2 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 edited currently (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 translation 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.
- *Translation Workflows* shows offered, pending and finished translation workflows.

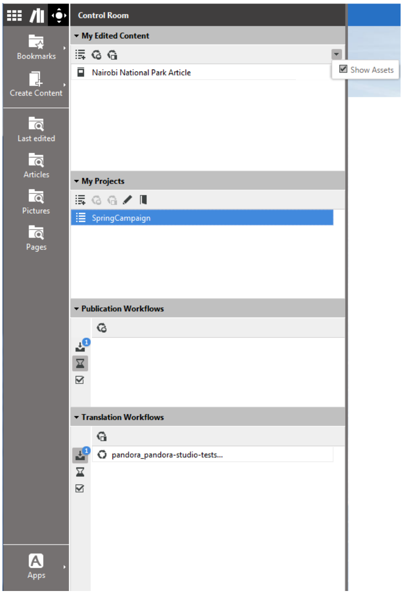


Figure 2.16. The Control Room

The *Publication Workflows* and *Translation Workflows* areas contain switchable workflow lists. With the icons shown in Table 2.2, “Workflow Lists” [30] 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 see more workflow details.

Table 2.2. Workflow Lists

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.

To access the Control Room, click the **[Show control room]** icon in the Favorites Bar header or press **F4** on your keyboard (if not configured otherwise).

2.4.3 Projects

Projects are a lightweight way to collaborate with your colleagues and to 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 over 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.

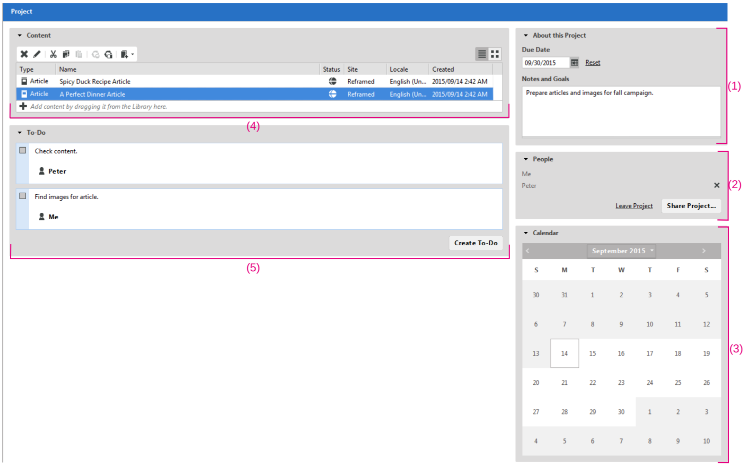


Figure 2.17. Project tab in Studio

In the Control Room 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.

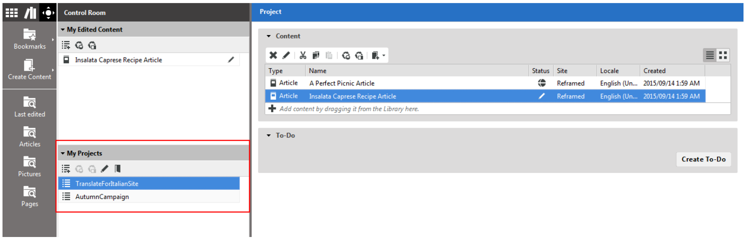


Figure 2.18. Your projects in the Control Room

2.4.4 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.

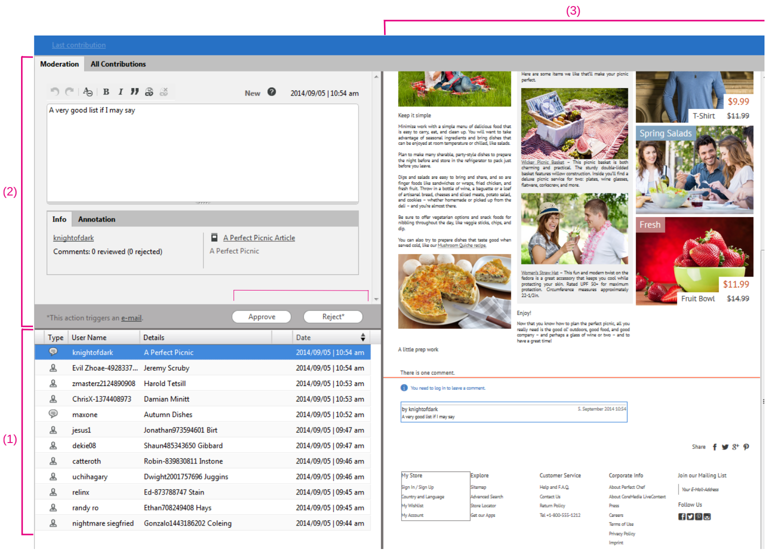


Figure 2.19. Moderation View

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 "Visit Louvre's new exhibition" article and you see the comments section of this article in the preview

2.4.5 User Management View

CoreMedia Elastic Social feature

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

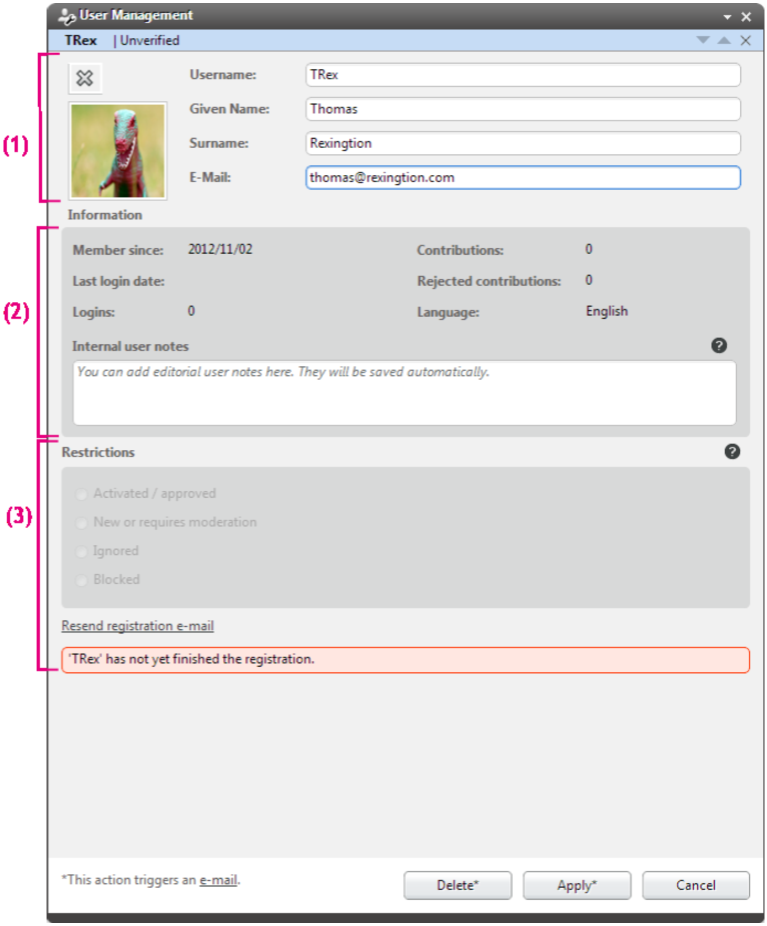


Figure 2.20. User Management View

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.

2.4.6 Library

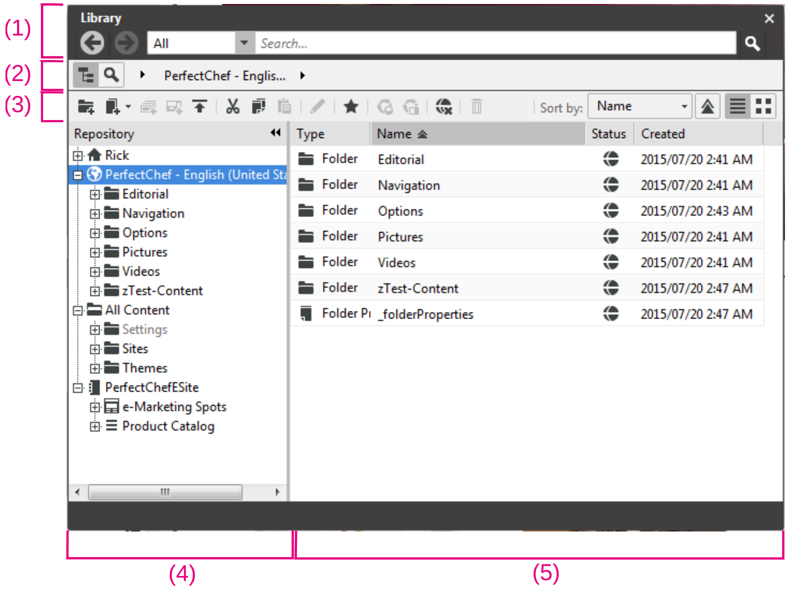


Figure 2.21. The Library

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 IBM WebSphere 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 Repository mode or in Search mode. In Library 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 Favorites Bar header or the search folders in the Favorites Bar. Alternatively press**F3**on your keyboard (if not configured otherwise).

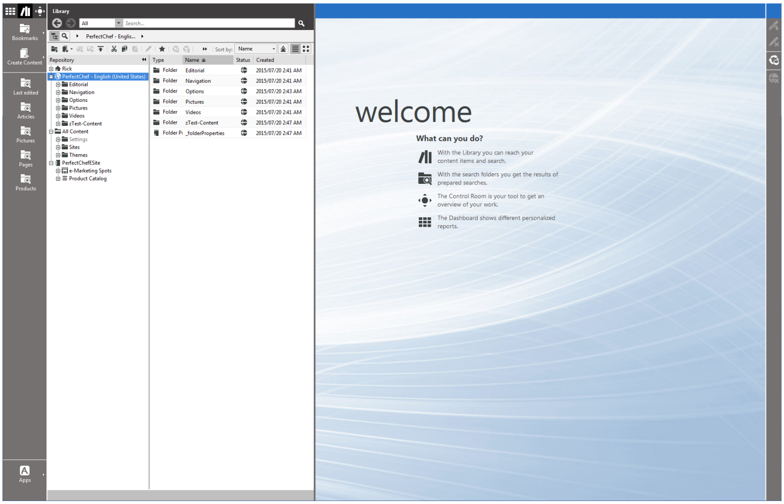


Figure 2.22. Studio with docked Library

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 e-Commerce 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 formatted text fields of a content item opened in the Form View.

2.4.7 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.

A right-click on the content opens a context menu which you can use to fix the conflict.

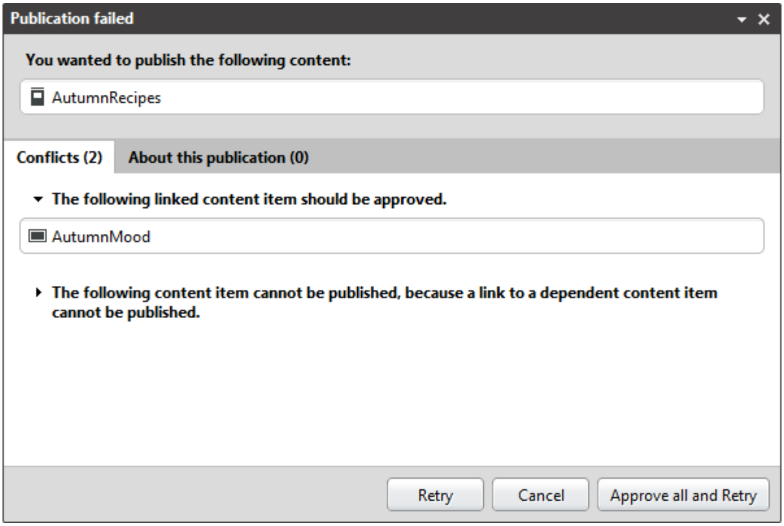


Figure 2.23. The Publication window

2.4.8 Dashboard

In order to give you a quick overview of your current work *CoreMedia Studio* contains the Dashboard. You can position different widgets on a grid and thus create your personal workplace.

CoreMedia Studio for example contains the following widgets:

- Edited by me: Shows the content items that you have edited at last.
- 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.

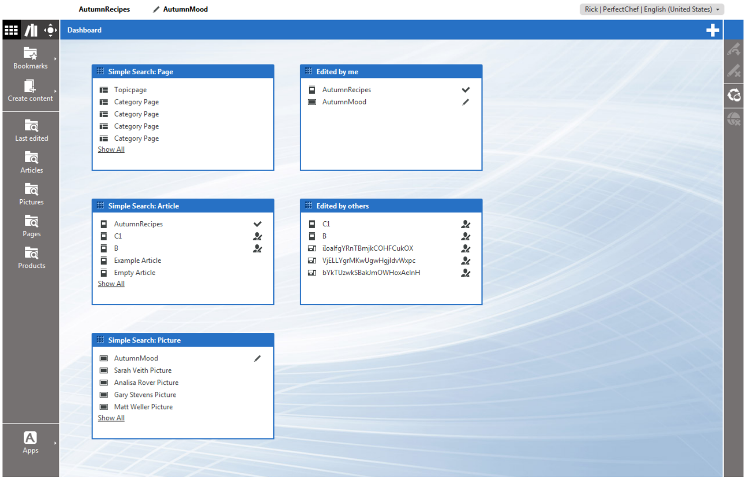


Figure 2.24. The Dashboard

While *CoreMedia CMS* was introduced in your company, chances are high that more widgets have been developed for your needs.

To access the Dashboard, click the **[Show dashboard]** icon in the Favorites Bar header or press**F2**on your keyboard (if not configured otherwise).

2.5 Permissions

CoreMedia CMS provides a powerful and complex rights system for access management. However, as a *Studio* 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 2.3. Rights icons

2.6 Versions

As you would expect from a Content Management System, *CoreMedia CMS* is able to manage several versions of a document. Each time, when you check-out a document and apply the changes, a new version will be created. You can see the version history of a document in the *Properties* 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” [107] for details)

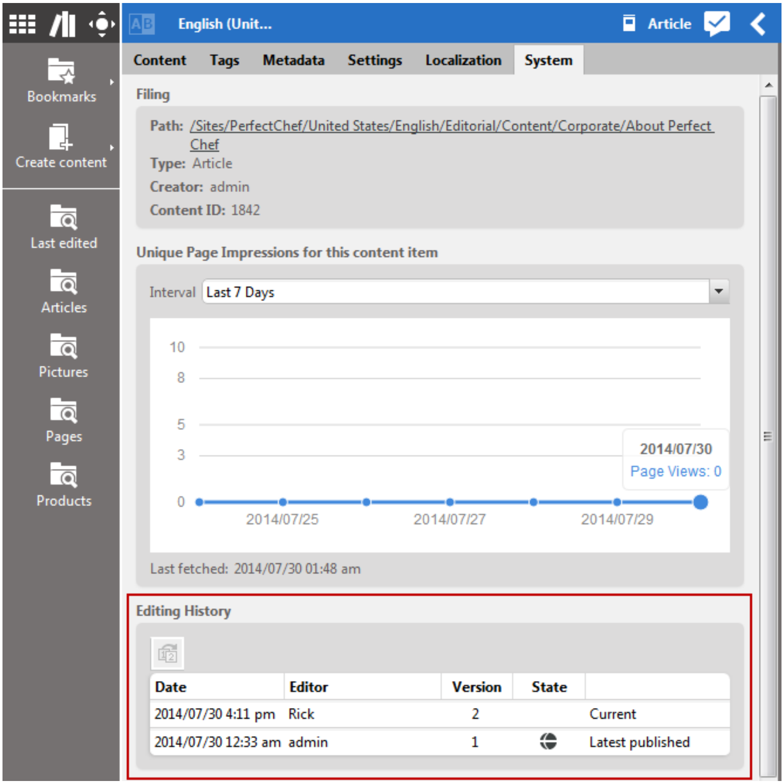


Figure 2.25. Editing history of a content item

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” [105] for details). However, you can not directly change a previous version.

2.7 Notifications

CoreMedia DXP 8 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.

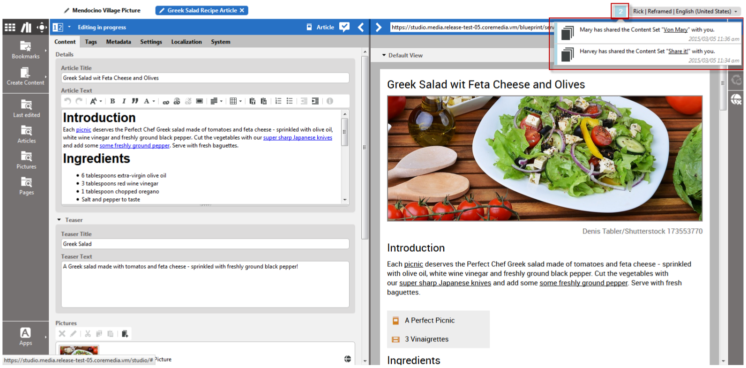


Figure 2.26. Notifications

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 2.27, "Validators in the Form" [42] shows all GUI elements, used with validators.

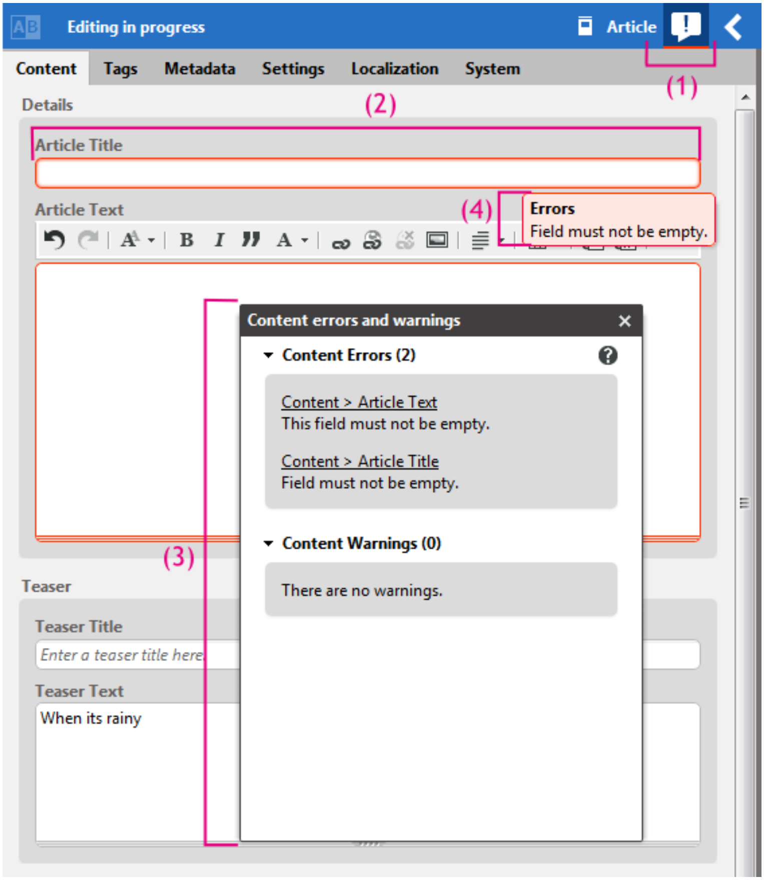


Figure 2.27. Validators in the Form

1. The icon (1) opens the list with all errors and warnings (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 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.

2.9 Workflows

With workflows you can publish or translate 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 2.4.2, "Control Room" [29]).

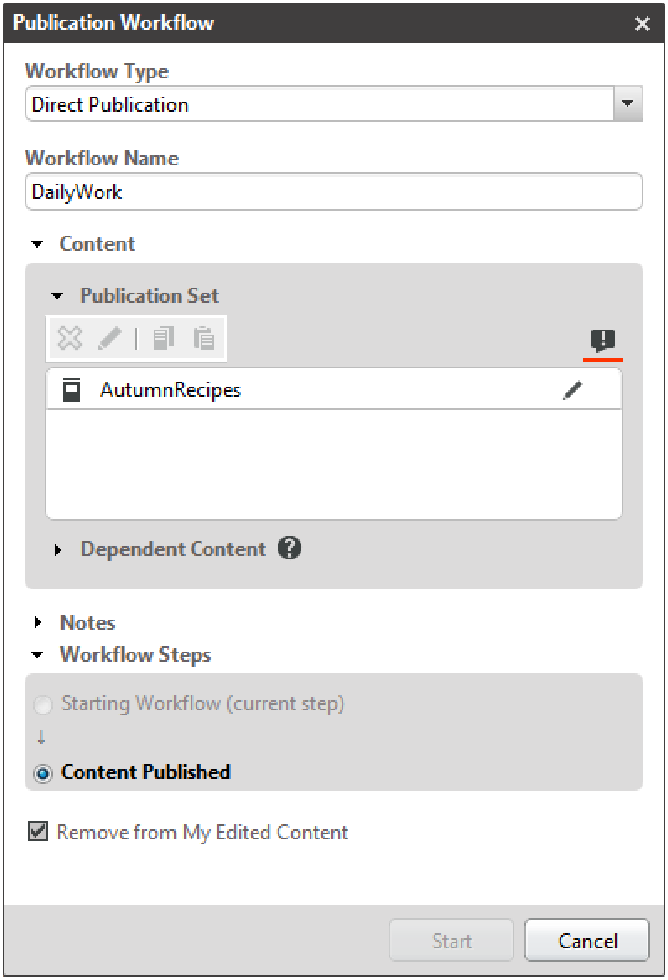


Figure 2.28. Starting a publication workflow

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 will be 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.

In the Control Room you can manage your workflows.

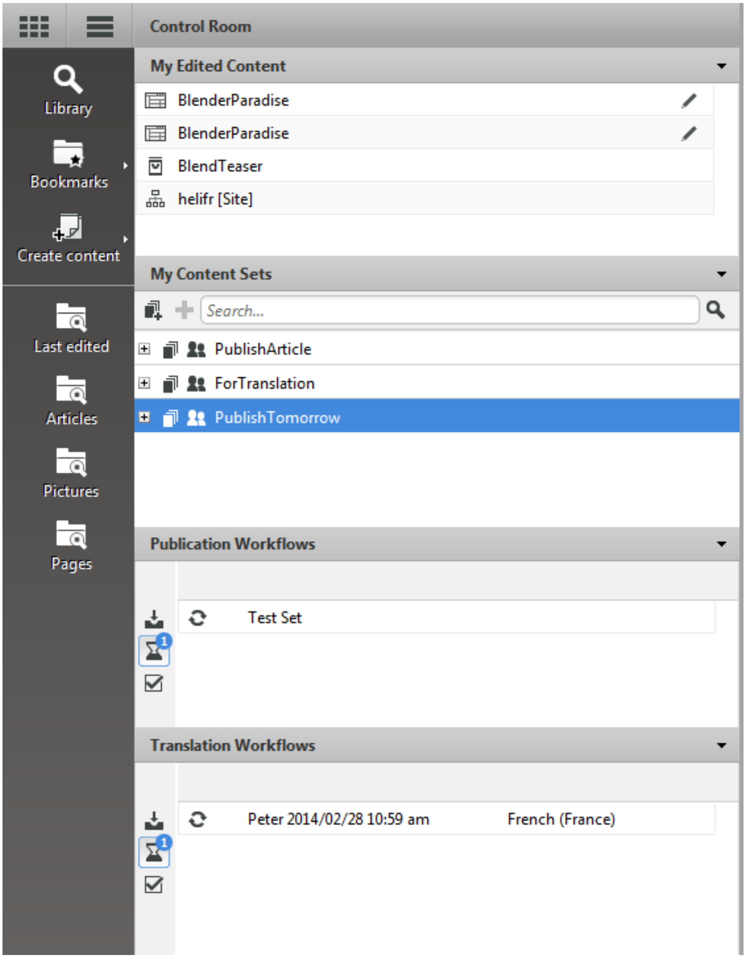


Figure 2.29. Managing your workflows

Starting Workflows

Publication and translation 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 *Translation Workflows* panel in the Control Room.

Table 2.4. Icons for starting workflows

Icon	Name
	Start a publication workflow
	Start a translation workflow

2.10 Multi-Site and Multi-Language

CoreMedia Digital Experience Platform 8 supports you in managing several sites in different languages 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 (see Section 3.2.6, “Selecting a Preferred Site” [63]). 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 2.30, “Preferred site in the Library” [48]. (1) shows the selected preferred site in the user information. 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.

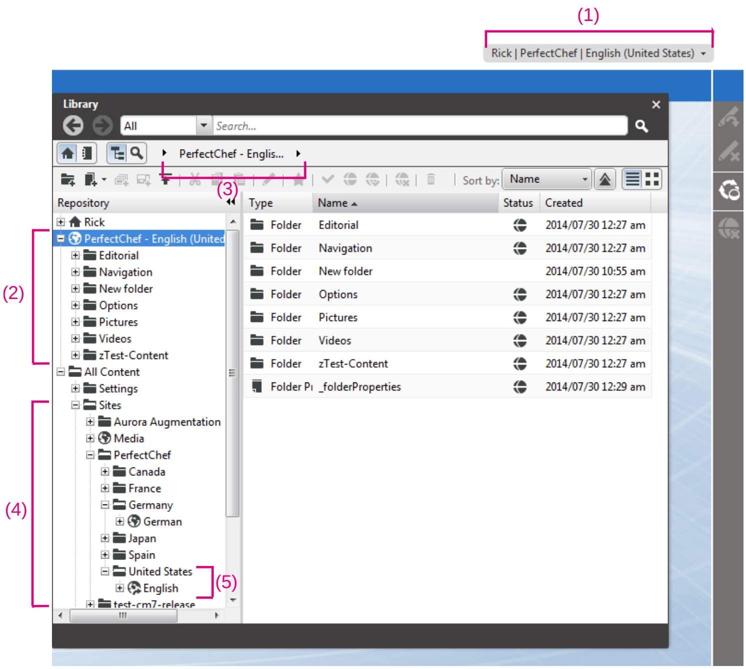


Figure 2.30. Preferred site in the Library

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 document

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 workflow by the system.

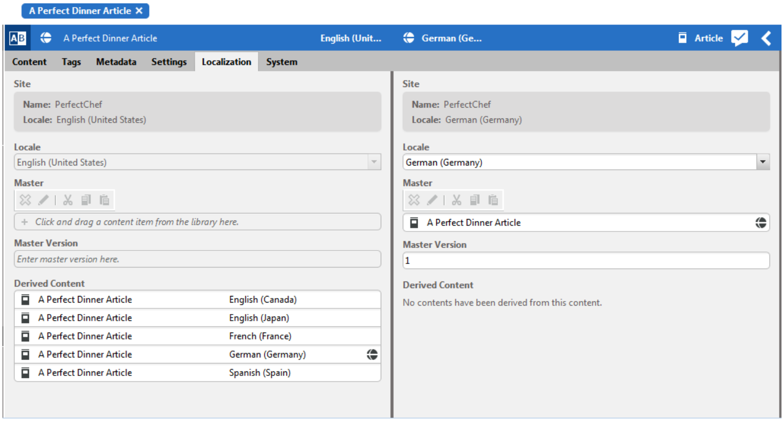


Figure 2.31. Side-by-side view showing the master relationship

Deriving sites

CoreMedia Digital Experience Platform 8 supports the site concept with the *Sites Window*. 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 “Preparing Translation: Deriving a Site” [178] for details).

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 translations.

Figure 2.32. Sites Window

For additional information you might want to read Section 6.5, "Localized Content Management" in *CoreMedia Digital Experience Platform 8 Developer Manual* and especially "Terms" for Localized Content Management in *CoreMedia Digital Experience Platform 8 Developer Manual*.

2.11 Personalization

Adaptive Personalization is a CoreMedia module 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.

Content types for personalization

CoreMedia Digital Experience Platform 8 contains specific content types, such as `Personalized Content` or `Personalized Search`. You can use these types to define content that will be shown when a specific condition is fulfilled. You might, for example, show teasers for different kind of music depending on the age of the user that accesses the page.

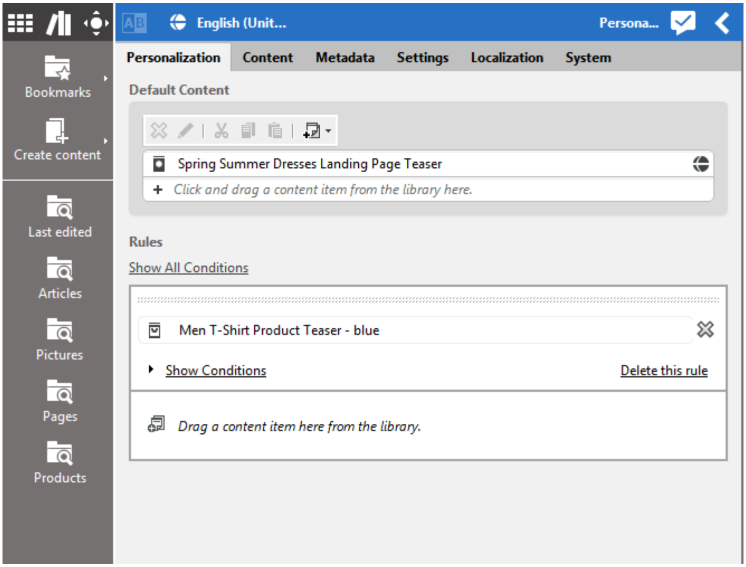


Figure 2.33. Personalized Content Example

FEP7+

The commerce segment personalization is not available when your system is running with IBM WebSphere Commerce (FEP6).

Commerce Segment Conditions

You can even use IBM WebSphere Segments in the CoreMedia personalization content. That is, a user will only see a CoreMedia content when the user is a member of a specific IBM WebSphere segment.

Personas

So called "Personas" can be used to test your personalized site. A Persona is a test user with specific attributes such as gender, age or hobbies. You can view your site in the context of this test user and check if your personalization settings work as expected. You can easily switch between different Personas (see Section 7.5, "Working with Personas" [276] for details).

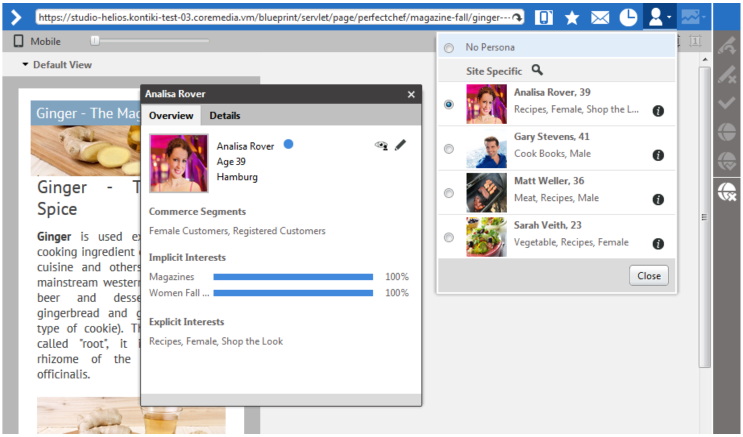


Figure 2.34. Persona Selector and overview

See Chapter 7, *Working with Personalized Content* [262] 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.

2.13 Product Catalogs

CoreMedia Digital Experience Platform 8 supports work with two product catalogs:

- With *Brand Blueprint* you can use a product catalog maintained as content in the CoreMedia repository.
- With *e-Commerce Blueprint* you can use IBM WebSphere Commerce catalogs

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.

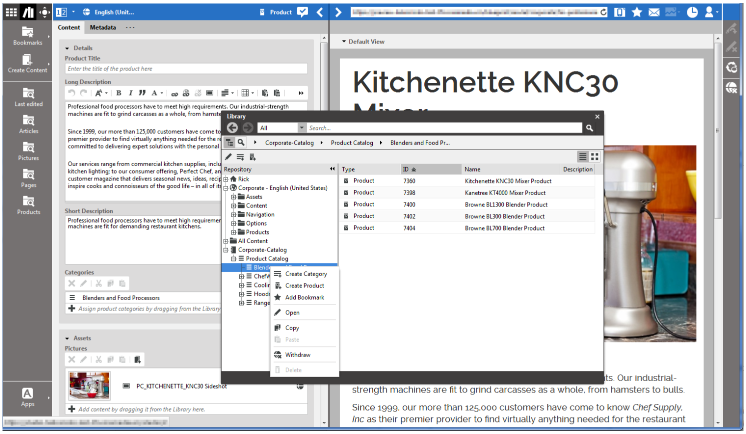


Figure 2.35. Studio with local catalog items

IBM WebSphere Commerce Integration

CoreMedia Digital Experience Platform 8 is a product that integrates with IBM Web-Sphere Commerce in order to let you create engaging and inspiring web shops. You can use the *Studio* Library to access e-Commerce 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 WebSphere system into this teaser. Now, you can add it to your page and you will see the Product information in your CMS site.

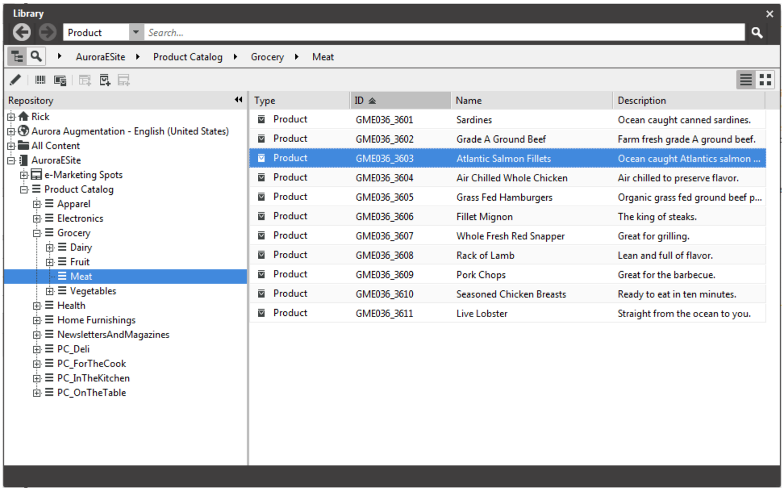


Figure 2.36. Library with e-Commerce content

IBM workspaces

If you use the Workspaces feature in *IBM WebSphere Commerce Server Management Center* you can select your current workspace in *CoreMedia DXP 8* and will see this data in the CoreMedia system.

Accessing the WCS Management console

If you want to edit WCS content, you can open the IBM WebSphere Commerce system directly from *Studio* with the Commerce item already selected.

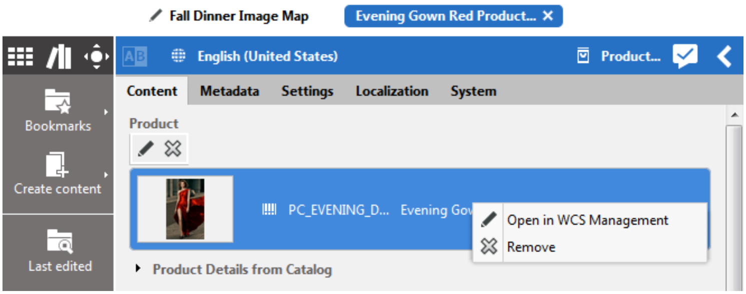


Figure 2.37. Open a product in the IBM WebSphere Commerce system

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 an IBM WebSphere Commerce segment or at a specific time. These settings are done in the *CoreMedia DXP 8* system but are also recognized in IBM WebSphere sites that integrate this CoreMedia content.

2.14 Asset Management

CoreMedia Advanced Asset Management is a module for the *Brand Blueprint* that requires a separate license.

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.

Adobe Drive integration

CoreMedia Advanced Asset Management integrates with Adobe Drive. Therefore, you can access your CoreMedia assets directly from your Adobe application, such as Photoshop.

3. Administration

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

3.1 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
- Configure Internet Explorer 9

3.1.1 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.

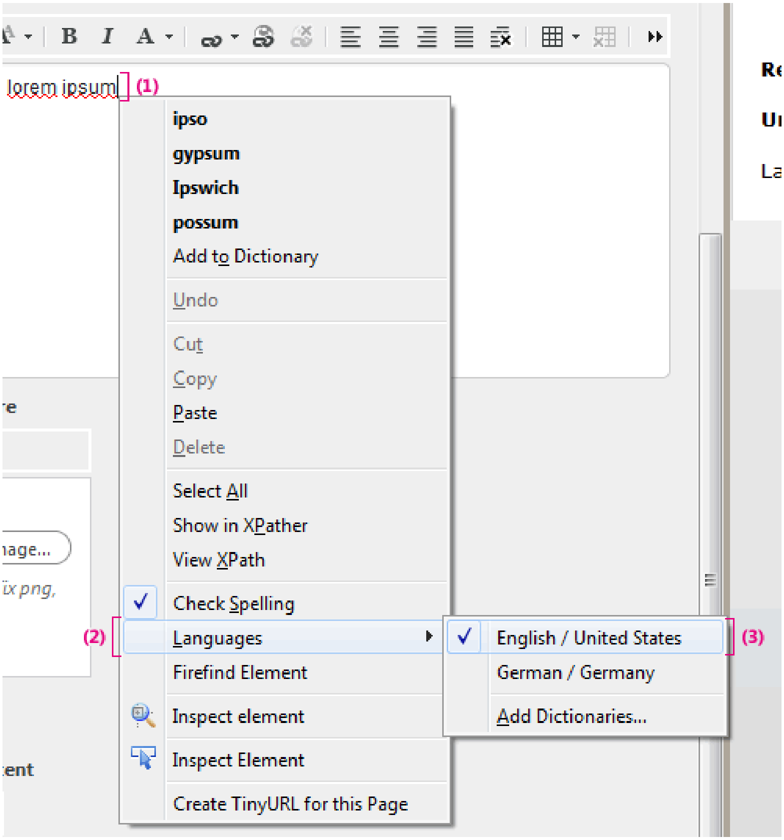


Figure 3.1. Enabling spell checking

3.1.2 Configuring Internet Explorer 9

Internet Explorer 9 included a compatibility view feature that displays Web sites that were created for older browsers as they were designed to appear. You should disable Compatibility View in Internet Explorer for using *CoreMedia Studio*.

> If **Compatibility View Settings** is not available, the network administrator may have used a Group Policy setting to configure the options for you.

Enable Web sites in IE standard mode

1. Select the menu item *Tools*. A menu opens up. If you don't see the item *Tools*, enable the *Command bar*. Click on *View* -> *Menu bar* -> *Toolbars*, and click on

Command bar to check it. You can also use a right click on the tab bar to enable the Command bar.

2. Select the menu item *Compatibility View Settings*. A window opens up.
3. Uncheck the item *Display intranet sites in Compatibility View*.

This method should solve any rendering problems in *CoreMedia Studio*.

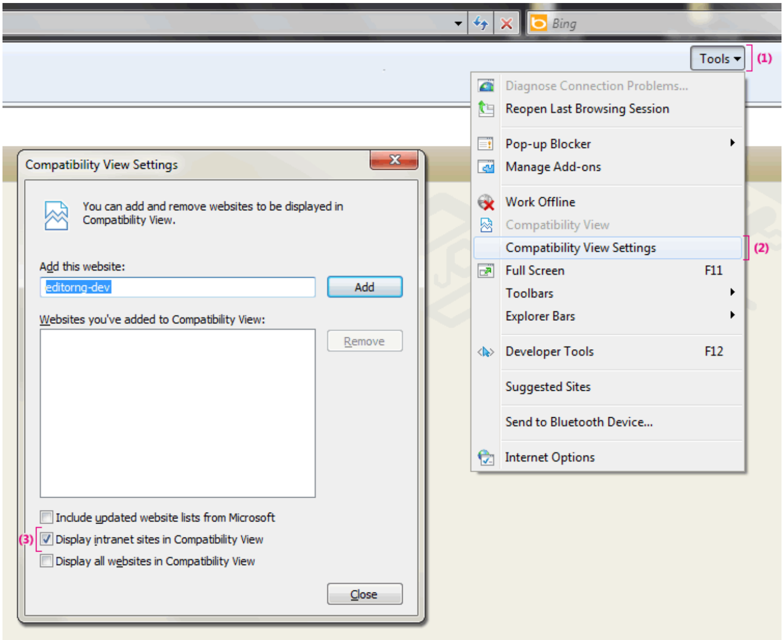


Figure 3.2. Disable compatibility mode

3.2 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 3.2.1, "Changing your password" [61] describes how you change your password.
- Section 3.2.2, "Changing the language of the GUI" [61] describes how you change the language of the GUI
- Section 3.2.3, "Configuring the information displayed in the User Menu Button" [62] describes how you change the contents of the User Menu Button
- Section 3.2.4, "Disabling the Auto-Hiding of Form Tabs" [62]describes how you disable the hightlighting of preview content.
- Section 3.2.6, "Selecting a Preferred Site" [63] describes how you select your preferred site.
- Section 3.2.8, "Configuring *Elastic Social*" [65] describes how you change settings in *Elastic Social*.
- Section 3.2.9, "Editing Mail Templates" [66] describes how you change the mail templates that are sent from *Elastic Social*

3.2.1 Changing your password

In order to change your password, proceed as follows:

1. Open the *User 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.

3.2.2 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.

3.2.3 Configuring the information displayed in the User Menu Button

By default, the user menu button in the top-right corner displays information about the user (1), the preferred site (2) and the locale of the preferred site (3).

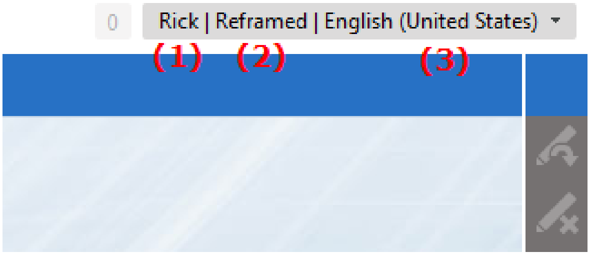


Figure 3.3. User Menu button with information

In order to configure this information, proceed as follows:

1. Open the *User Menu* and select **Preferences**.
2. The *Preferences* window opens up. Disable or enable the following checkboxes to get the desired results:

   Show Site Name
   Show Site Locale
   Show User Name

   Site refers to your preferred site. The settings on site information is ignored unless you have a preferred site selected.

The user menu now displays the information that has been selected in the Preferences window.

3.2.4 Disabling the Auto-Hiding of Form Tabs

By default, the "System" and "Localization" tabs of the studio forms are hidden and only shown if the user hovers the title of a third tab with title "...". This behaviour can be disabled so that all tabs are always shown.

1. Open the *User Menu* and select **Preferences**.
2. Enable the checkbox *Always Show Advanced Tabs in Forms*.

3.2.5 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*.

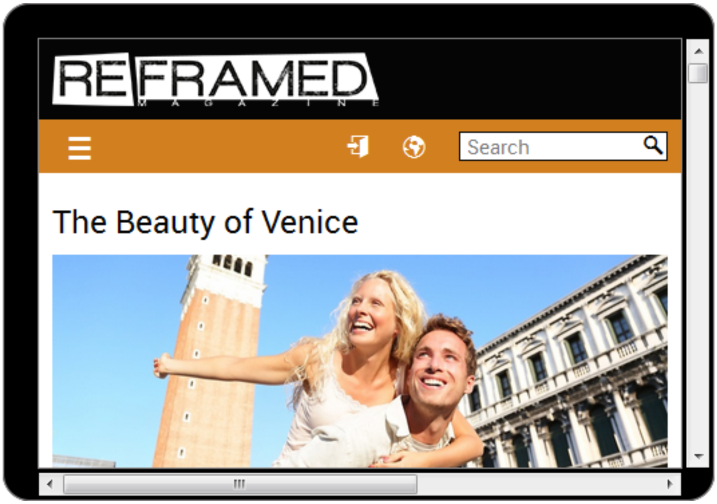


Figure 3.4. Mobile device preview with scrollbars

3.2.6 Selecting a Preferred Site

CoreMedia DXP 8 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.

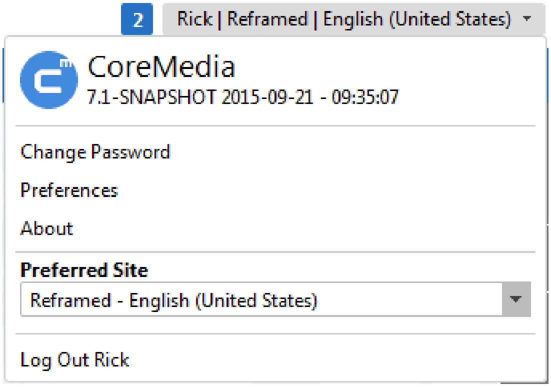


Figure 3.5. Site selector

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

1. Open the **User Menu**.
2. Select the site from the *Site* dropdown field.

3.2.7 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” [289]), the standard *Blueprint* project allows you to set the `filterCategories` property of the *Elastic Social* settings document (see previous section). If this property does not exist, it has to be added as a link list property of the elasticSocial struct as shown in Figure 3.6, “Configuring available filter categories for comments” [64].

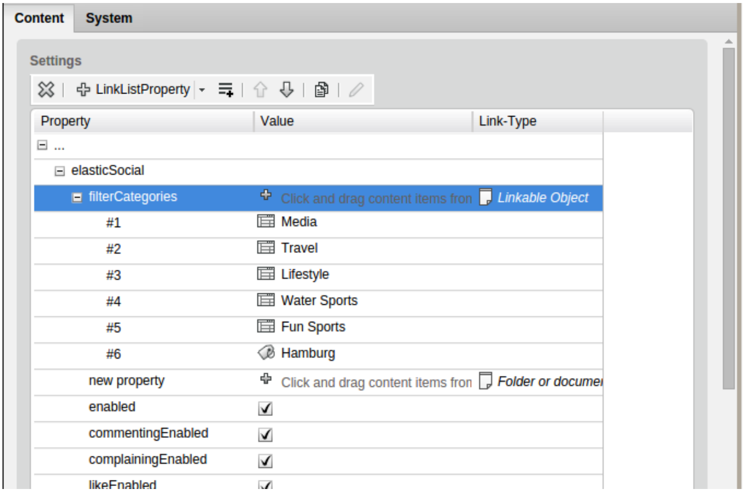


Figure 3.6. Configuring available filter categories for comments

Only linked Page and Tag documents 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 document.

3.2.8 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 *Elastic Social* chapter of the [CoreMedia Digital Experience Platform 8 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.

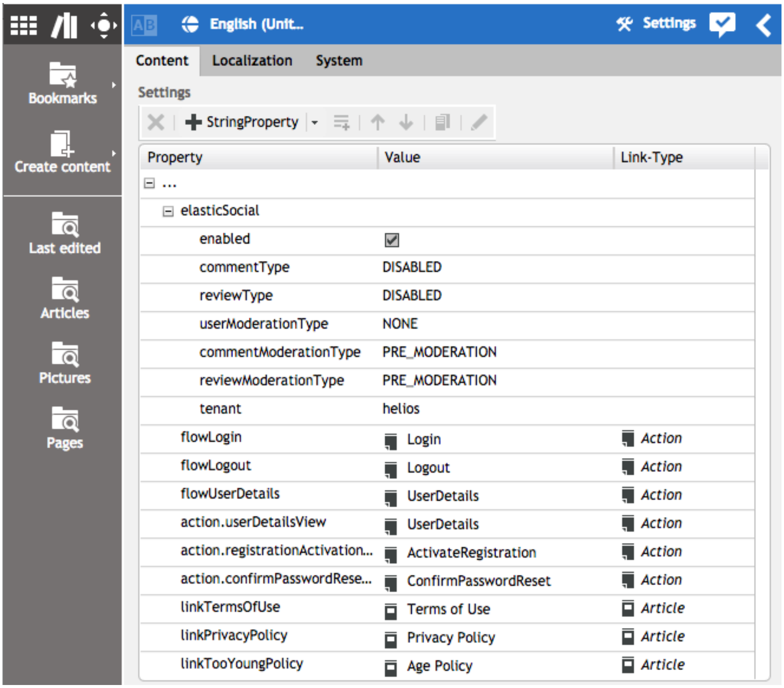


Figure 3.7. Elastic Social configuration in a Settings content item

3.2.9 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.

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

3.3 Getting Technical Information

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

1. Open the *User Menu* and select **Preferences**.
2. The *Preferences* window opens up. Select **About**. The About window opens up.

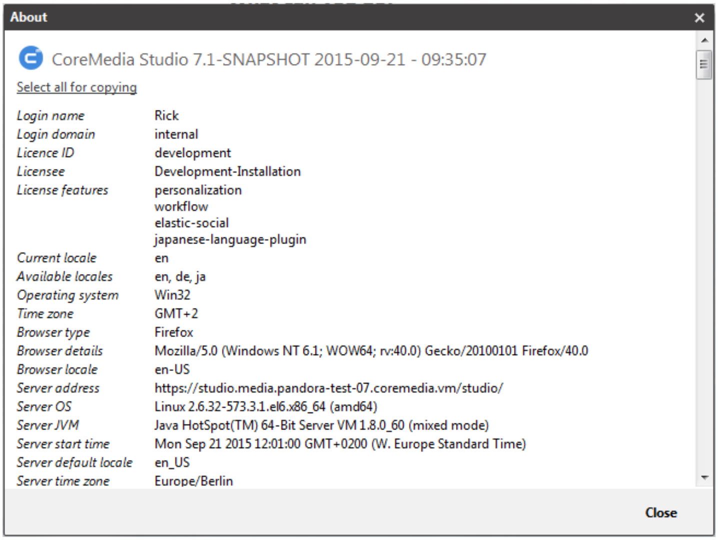


Figure 3.8. The About window

3. Click **[Select all for copying]** to copy the content of the window into the clipboard.

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" [69] shows you how to start the *CoreMedia Studio* application.
- Section 4.6.2, "Comparing Versions" [107] shows you how to compare two versions of a content item.
- Section 4.2, "Using the Dashboard" [70] shows you how to work with the Dashboard.
- Section 4.3, "Locating Content" [74] shows you how to locate content items and navigate within the *Studio*.
- Section 4.4, "Editing the Content Structure" [85] 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" [96] shows you how to edit the navigation and layout of your site.
- Section 4.6, "Editing Content" [105] 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" [164] 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 a 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 2.4.8, “Dashboard” [37] for details).

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

Table 4.1. Dashboard Icons

Symbol	Name
	Show Dashboard
	Add Widget
	Open Widget Configuration
	Close Widget Configuration
	Refresh Widget

4.2.1 Adding Widget

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

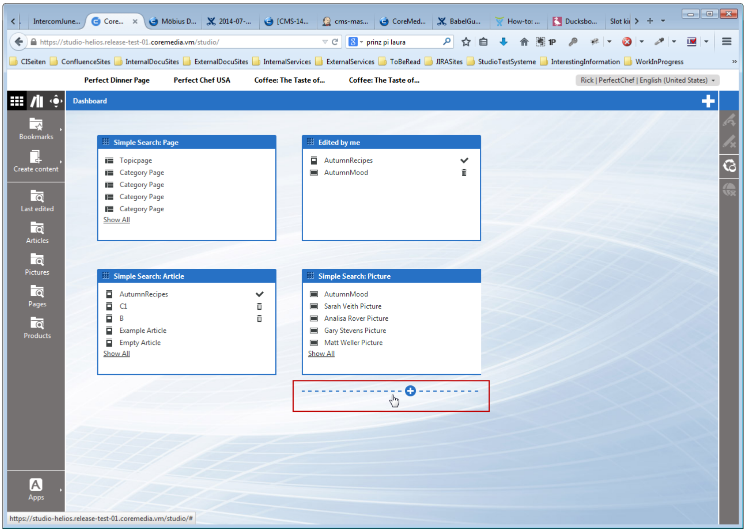


Figure 4.2. Adding widget

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 widget" [70]) and click with the mouse. A new widget opens in configuration mode.

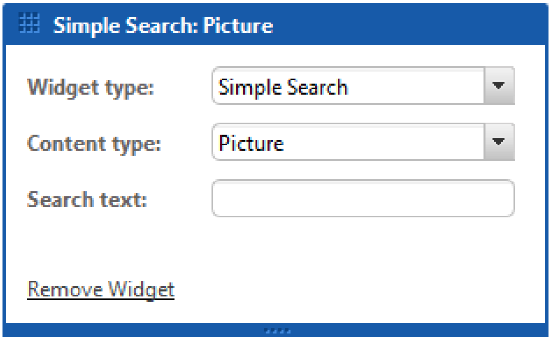


Figure 4.3. Widget in configuration mode

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 **[Close Widget Configuration]** icon. Now, you have created a new widget.

4.2.2 Refreshing Widgets

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

4.2.3 Removing Widget

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 Widget

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

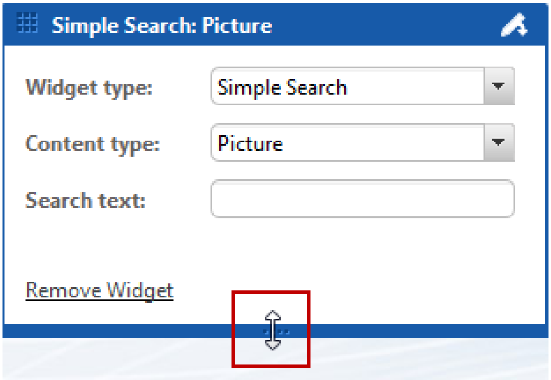


Figure 4.4. Scale widget

4.2.5 Adding Site Performance Widget

CoreMedia Blueprint feature

To get an overview about the performance of a site, a widget can be configured on the *Dashboard*.

The widget accumulates the page impressions and publication events of the articles for the configured site.

The page impressions and the publication events are aggregated asynchronously. The timestamp of the last retrieval is displayed respectively. By default, page impressions are retrieved every 24 hours and publication events every 3 hours. If no data is available for the selected time span, no chart is displayed.

The statistics can be displayed for the last 7 or 30 days.

Be aware to configure the widget "Site Performance" for a site corresponding to your current tenant. Otherwise, no data can be displayed (see Figure 4.6, “Configuration of Widget for Site Performance Statistics” [73]).

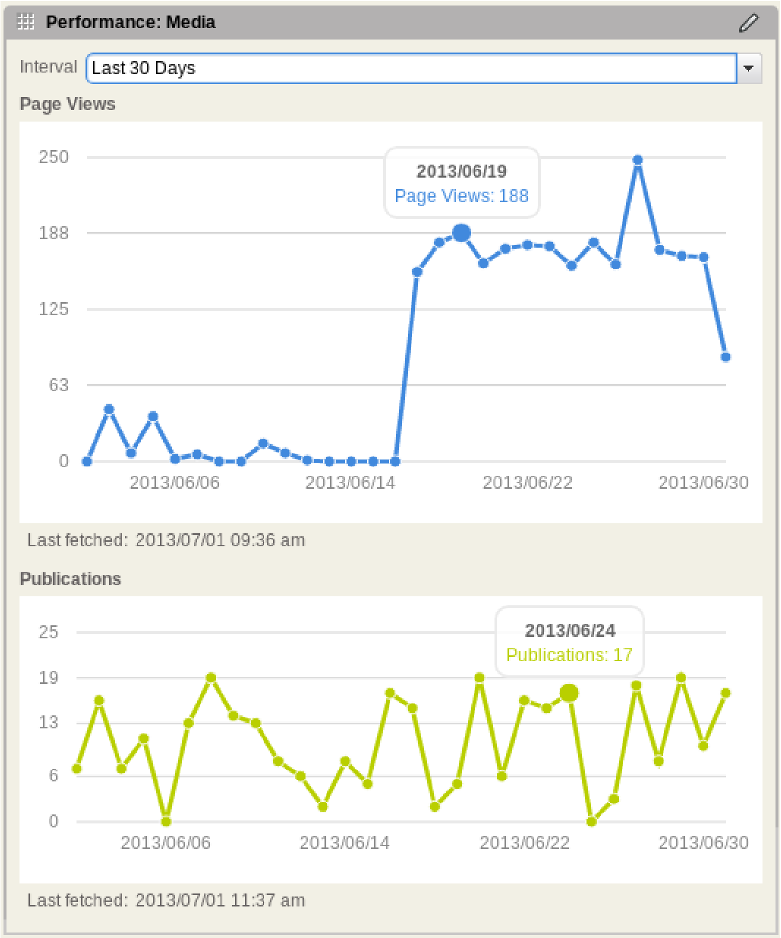


Figure 4.5. Site Performance Statistics Widget

Figure 4.6. Configuration of Widget for Site Performance Statistics

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 search folders or search widgets
- Using a full-text search to find content items in the Library
- 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 Creating Search Folders

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

1. Open the Library or right-click in the Favorites Bar and select **Add Search Folder** and execute a search as described in Section 4.3.4, "Navigating in the Library" [76].
2. Click the **[Save search folder]** Icon.

   A dialog box opens up where you can select an action and enter a name (see Figure 4.7, "Creating a search folder" [75].
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. If you want to replace an existing search folder, select it from the dropdown box and enter a new name in 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 Favorites Bar, respectively a new widget on the dashboard. New entries in the Favorites Bar always appear at the end but you can use the context menu to change the order of the search folders.

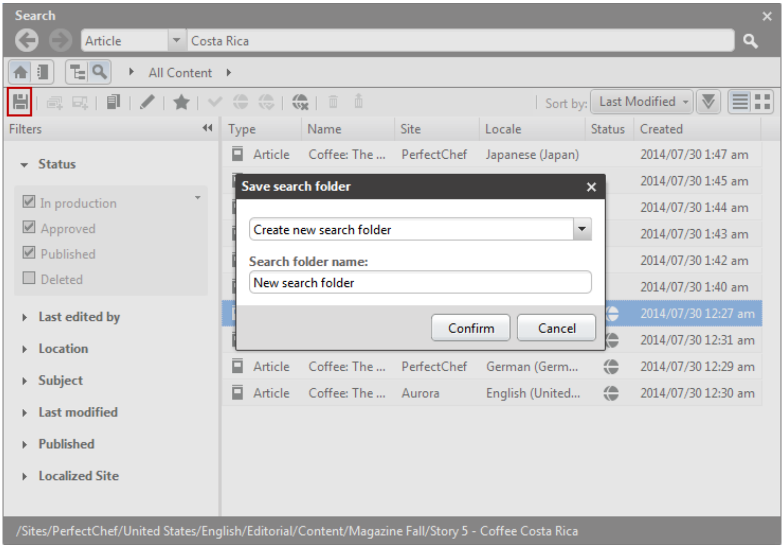


Figure 4.7. Creating a search folder

4.3.2 Deleting a Search Folder

In order to delete a search folder, right-click the folder and select **Remove Search Folder** from the context menu.

4.3.3 Using Search Folders

The Favorites Bar with the search folders is shown on the left edge of the *Studio* screen (see Figure 4.8, “Search Folders” [76]. 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 icons (1) in order 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.

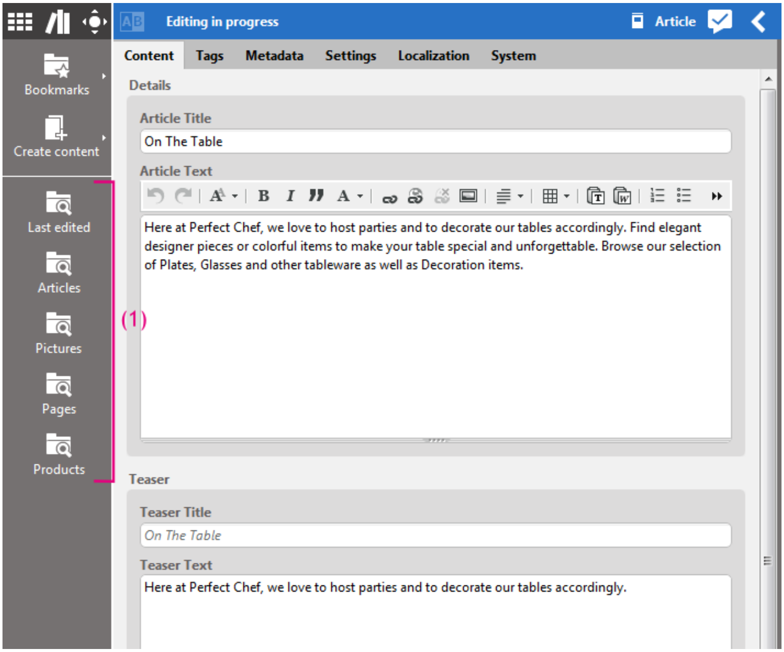


Figure 4.8. Search Folders

4.3.4 Navigating in the Library

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

- Full-text search of all content items in the CMS and the e-Commerce catalog.
- Full-text search of specific content types
- Full-text search below a specific folder
- Filtering results by status and the content item's last editor, for example.
- Navigating using the tree view
- Finding content in the trash
- Sorting content in columns
- Hiding columns

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 at the right side of the head. Click the arrow and a menu opens up. Select **Columns** and uncheck the columns you want to hide.

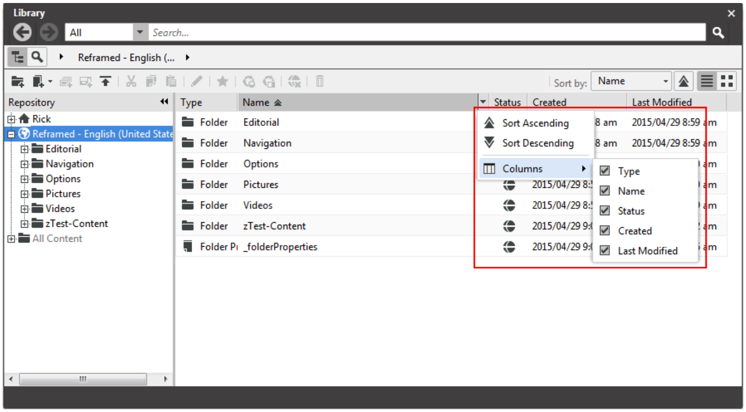


Figure 4.9. Hiding columns

Sorting by column

Sorting lists

You can sort your lists in the Library or change the order by either clicking a table header (3) or by selecting a search criterion from the dropdown box (1) and clicking the icon (2). Keep in mind, that not all columns are sortable and that, by a search, the dropdown box contains criterions that have no corresponding table column (for example, "Relevance").

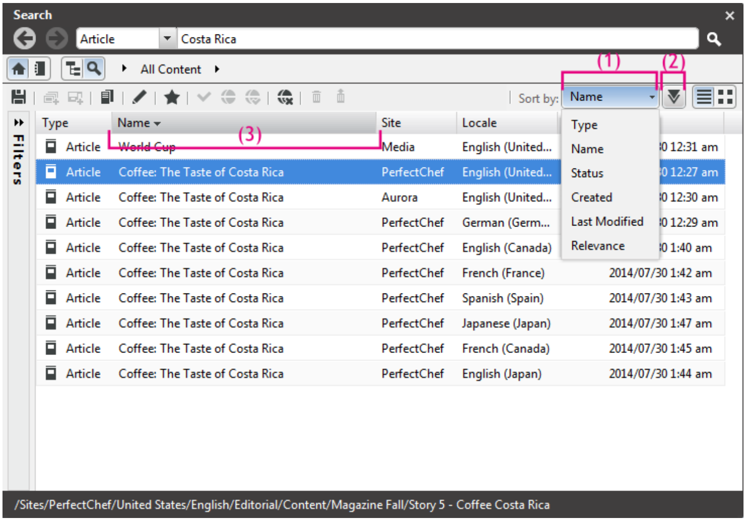


Figure 4.10. Sorting lists

Full-text search

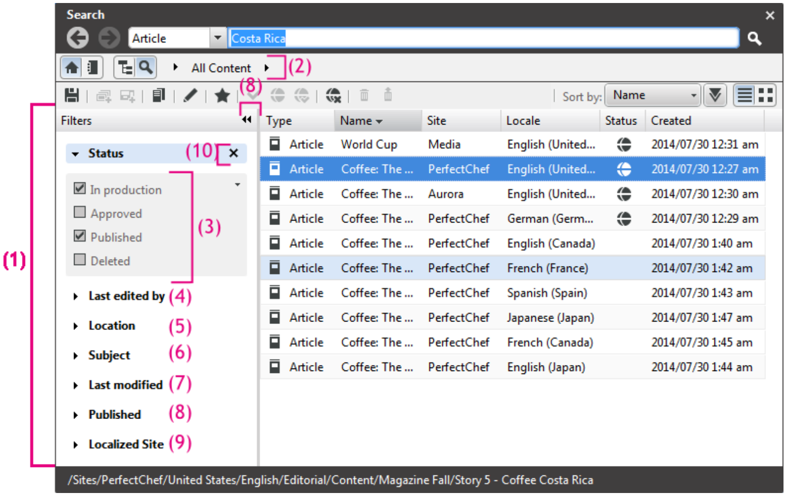


Figure 4.11. Filter your results

To make a full-text search, proceed as follows:

1. Select the CMS view or the e-Commerce catalog view in (4).
2. If you only want to search for specific content types, use the dropdown box (1) to select the content type.
3. If you want to search below a specific folder, select the folder with the bread-crumb navigation (4).
4. Enter your search term in the search box (2). You can also enter multiple terms: the system then searches for text items containing both terms ("AND" matching). The search engine 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 (3).
5. You can then proceed to filter the search terms by *Status* and *Last edited by* for example, as described in the next section. Filtering does not apply to content from e-Commerce.
6. To start the search click the *magnifier* icon or simply press the <Return> key.

The search terms are now displayed in the list or tile view. In the list view you will get the type and status of a content item as additional information, for instance `CMArticle` and "Published". In the thumbnail view you will get a small preview image, if applicable.

Filtering the results

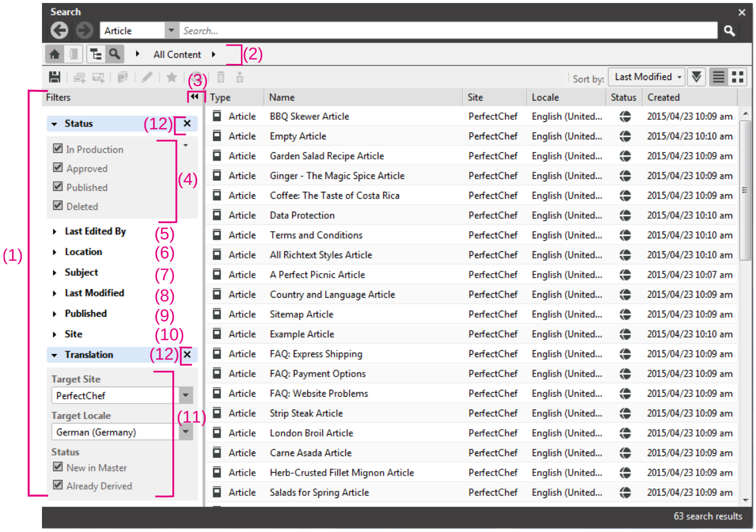


Figure 4.12. Filter your results

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 the several criteria. Moduels of *CoreMedia DXP 8* 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)
- Location keywords (6)
- Subject keywords (7)
- The last modification date (8)
- The last publication date (9)
- The site (10)
- The translation state (11)

1. Select the folder in which you want to search with the breadcrumb navigation.
2. Mark your chosen status 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 documents 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.

The filtered content items are now displayed. Blue highlighting is used to show whether the filter is different to the default setting. You can use the "x" icon (12) to restore the default setting.

Using the library mode to navigate

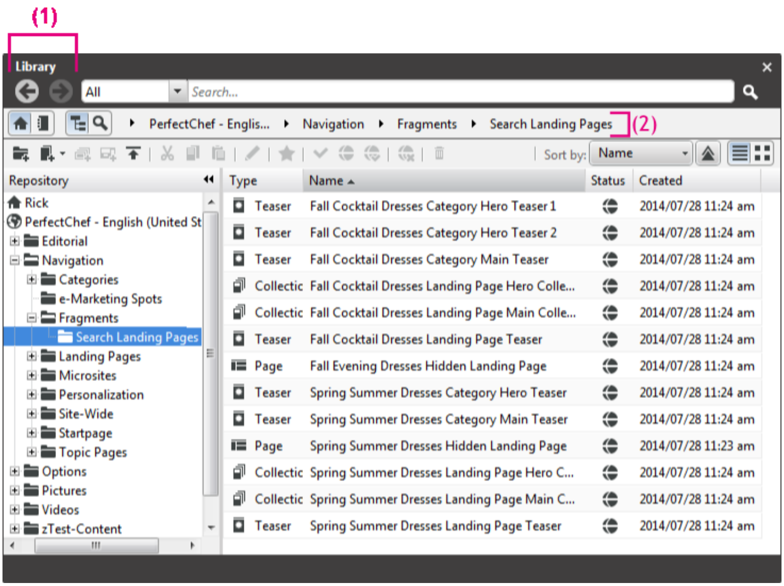


Figure 4.13. The Tree view

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

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.

4.3.5 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.

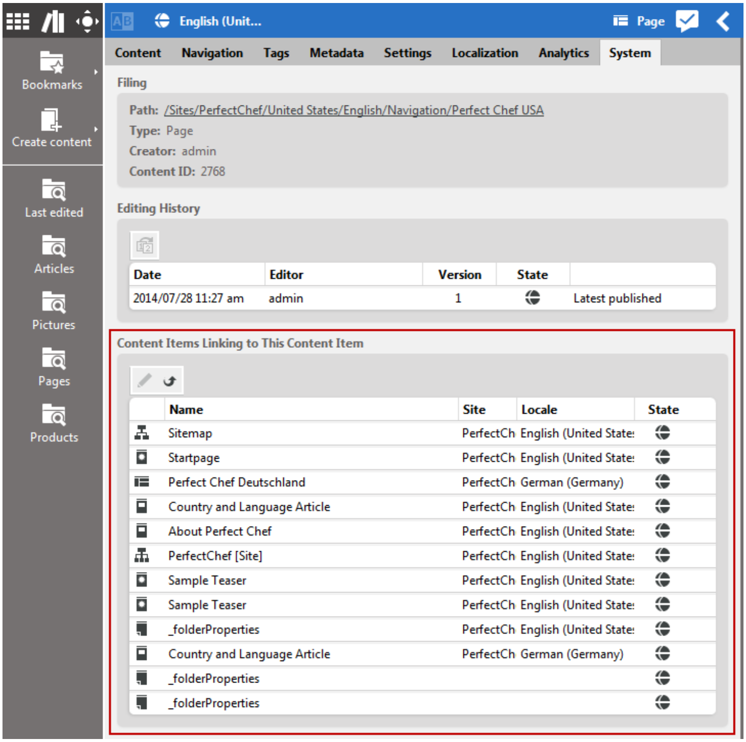


Figure 4.14. Documents linking to this document

4.3.6 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.

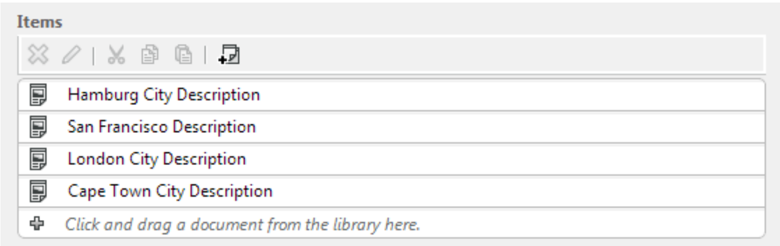


Figure 4.15. Linklist with context menu

4.3.7 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.

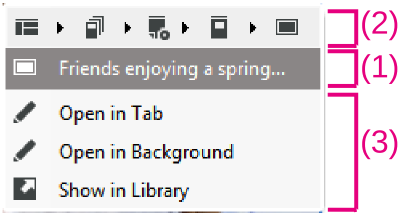


Figure 4.16. Context menu in the preview

The headline (1) shows the name of the content item, the line below (2) shows how the item is linked in other content items. 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.

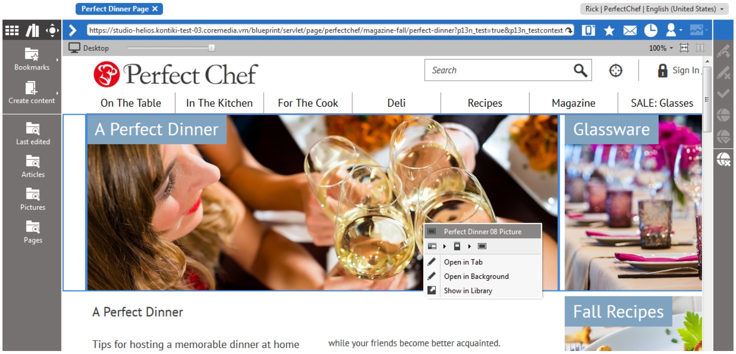


Figure 4.17. Context menu in Preview

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**.

4.3.8 Showing Content Items in the Library

You can move, copy or rename content items using the Library in repository mode. If you want to open a content item in the Library which you are editing in the Form, click the path in the Properties tab to do so. The Library opens up and the content item is already selected.

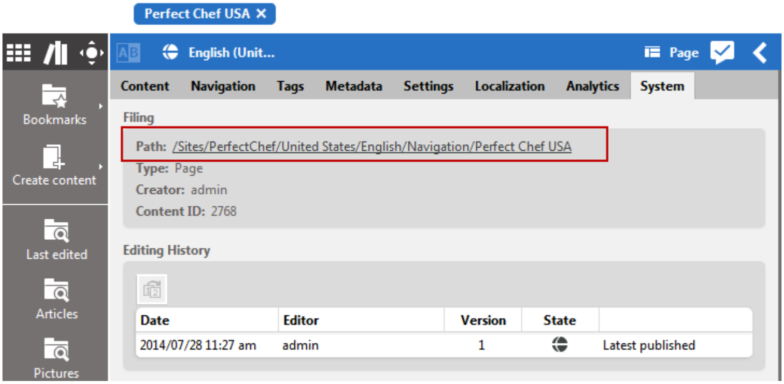


Figure 4.18. Open in library

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

By default, you will create new folders or new content items in the Library. This process involves the following icons:

Table 4.2. Icons for content item creation

Icon	Name
	Library mode
	Create folders
	Create content items

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

Creating Content Items in the Library

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

1. In the Library, click the *library mode* icon.
2. Mark the folder in the tree view where you want to create your new content item.
3. Click the *Create document* icon to create a content item or the *Create folder* icon to create a folder.
4. If you have selected *Create document*, 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.

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.

Creating Content Items from the Favorite Bar

CoreMedia Blueprint lets you create new content items with two mouse clicks. Simply click the **[Create Content]** icon in the Favorite 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.

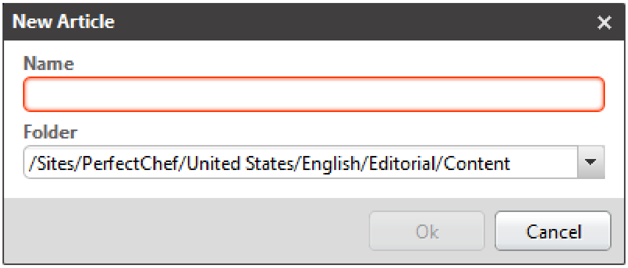


Figure 4.19. Article creation

The Page creation dialog has more fields to fill and is described in Section 4.5.2, “Creating a Navigation Node” [99].

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” [96])
- Defining the layout of your website (see Section 4.5.1, “Editing the Layout” [96])

- Adding content to your website (see Section “Editing a Page Grid” [96])
- Define settings for your website
- Define Analytics settings for your website

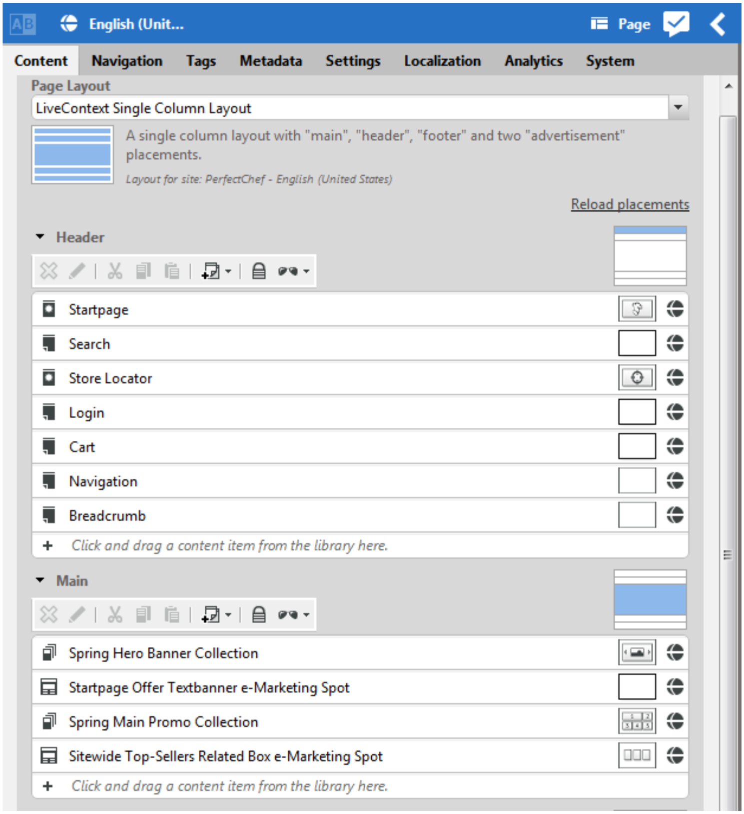


Figure 4.20. Page form

The Page content item has eight 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” [96]
Navigation	In this tab, you add a title to the page, the navigation children and layout variants.

Tags

In this tab, you define `Tag` keywords for the page as described in Section 4.6.15, "Metadata Management" [156]

Metadata

In this tab, you define an URL Segment for the Page (see Section 4.5.2, "Creating a Navigation Node" [99]), 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" [104]) and the validity of the Page (see Section 4.6.14, "Time Dependent Visibility" [155]).

Settings

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. In addition, you can associate JavaScript and CSS files with the page.

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.

Analytics

In this tab, you configure Analytics settings for your site.

System

In this tab, you will find information about the Page.

- The *Filing* field shows you information about the location of the Page, its type, Creator and content ID.
- The *Editing History* field shows you the versions of the content item. Here you can checkout older versions of the content item.
- The *Content Items Linking to This Content Item* field shows the content items which link to the Page.

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.

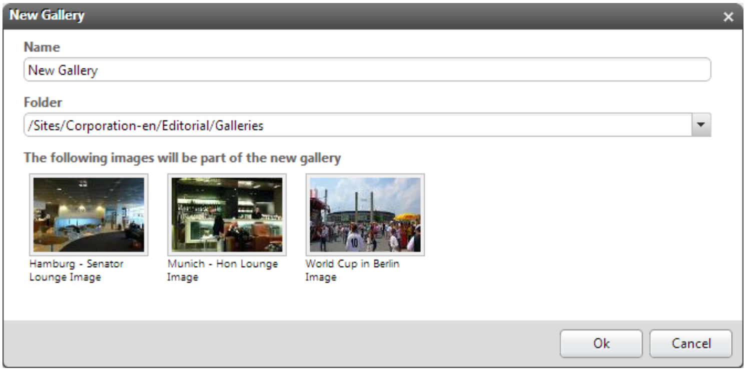


Figure 4.21. New Gallery dialog

Icon	Name
	Create image gallery

Table 4.3. Icons for managing content

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

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.

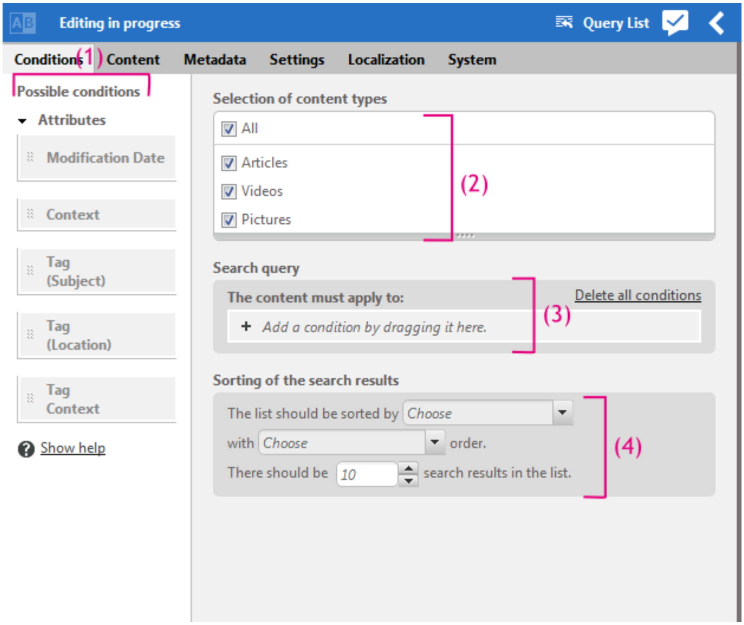


Figure 4.22. The Query List Editor

You can use five different condition types:

Modification Date	The last modification date of the content item
Context	The context to which the content item belongs.
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.

Creating a Query List

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

1. Create a new Query List content item
2. Select in the *Selection of content types* (2) field which kind of content items should be found by the query.

3. Drag a condition type from the *Possible conditions* field (1) to the *Search query* field (3).

   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, drag more condition types to the *Search query* field.
6. Configure the sorting and number of results in the *Sorting of the search query* field (4).

Uploading Files

CoreMedia Blueprint lets you upload files from your file system into the CoreMedia repository using drag and drop. The CoreMedia system creates a new content item that contains the uploaded 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.

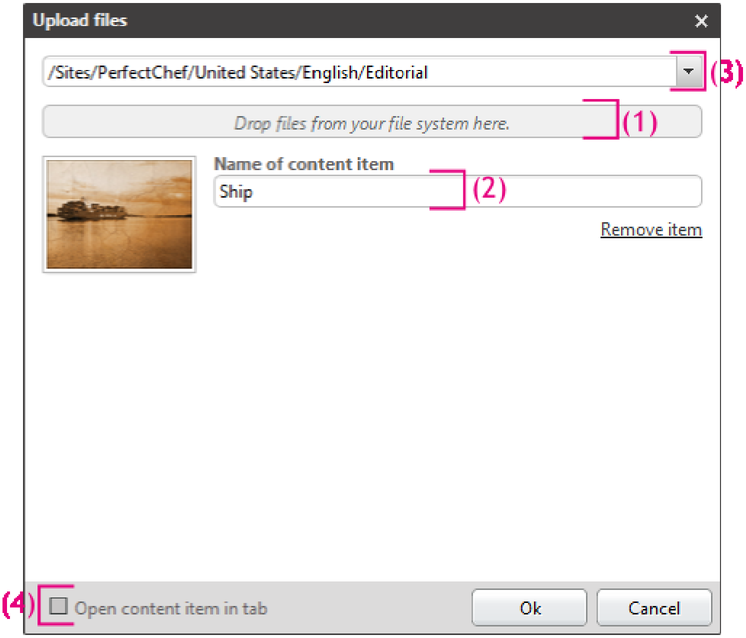


Figure 4.23. Upload dialog

Icon	Name
	Uploading files

Table 4.4. Icons for managing content

In order to upload files proceed as follows:

1. Open the upload dialog from the **Create Content** menu (see Section “Creating Content Items from the Favorite Bar” [86]) or click the **[Upload files]** icon in the library. The upload dialog opens.
2. Drag the image onto the drop area (1) of the dialog. The *Content name* field (2) will be filled with the name of the file.
3. 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.
4. 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.
5. Click **[OK]** in order to create the content items.

Adding External Content

CoreMedia Blueprint allows you to preview data that is not located in the *CoreMedia CMS* repository, RSS feeds for example, and convert this content into a *CoreMedia CMS* content item. By default, RSS feeds and the video platform Kaltura are integrated. You can use the search (2) to search through the external content.

> The External Library is not used for the integration of content from the IBM WebSphere Commerce system. This is done in the standard Library (see Section 2.13, “Product Catalogs” [54]).

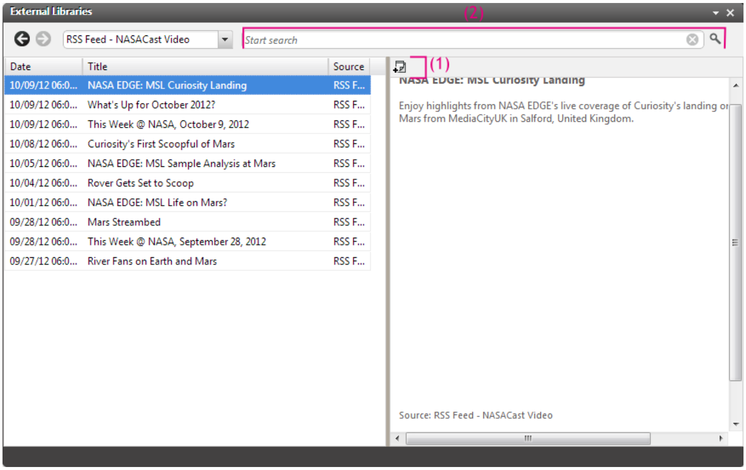


Figure 4.24. External Library

In order to open the library click **[Apps]** in the *Favorite bar* and select *External Libraries*. If you want to create a content item from an entry of the External Library, click the *Create new content* icon (1).

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

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.

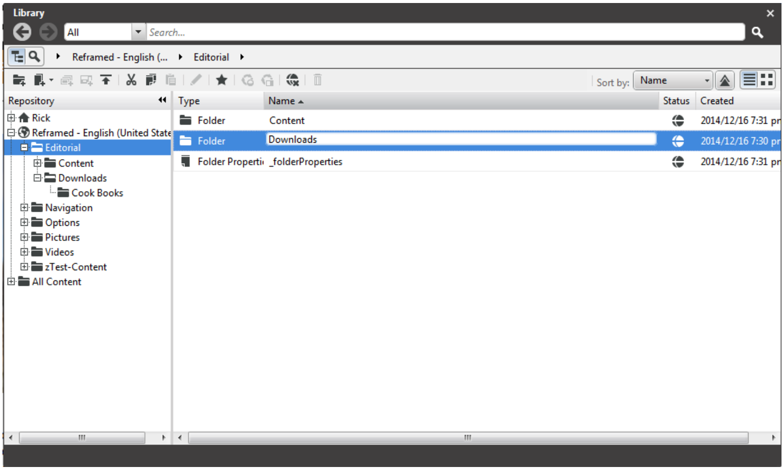


Figure 4.25. Changing the name of a folder

4.4.3 Deleting 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 "Withdrawing Content" [176].

Table 4.5. Icon for Deletion

Icon	Name
	Delete

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.

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, a deleted file might be restored by an administrator.

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" [15] 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.

Table 4.6. Layout icons

Icon	Name
	Lock content
	Inherit content

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. A small preview graphic shows where the content appears on the site.

Section 4.6.5, "Editing Link Lists" [128] describes how you add or create content in the link list.

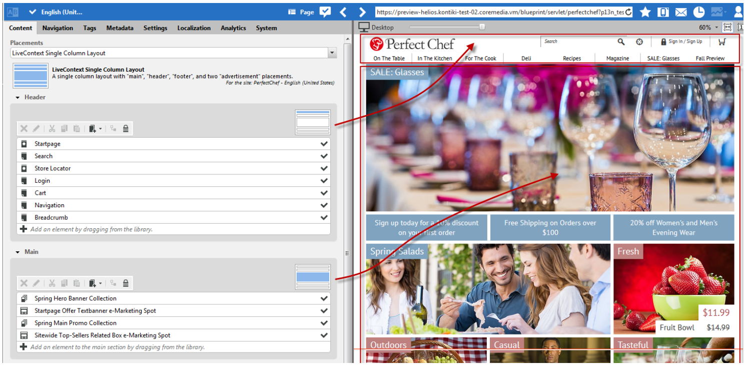


Figure 4.26. Preview of the position where the placement appears

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 4.27, "Locked Navigation Bar placement in a sub page" [98]).

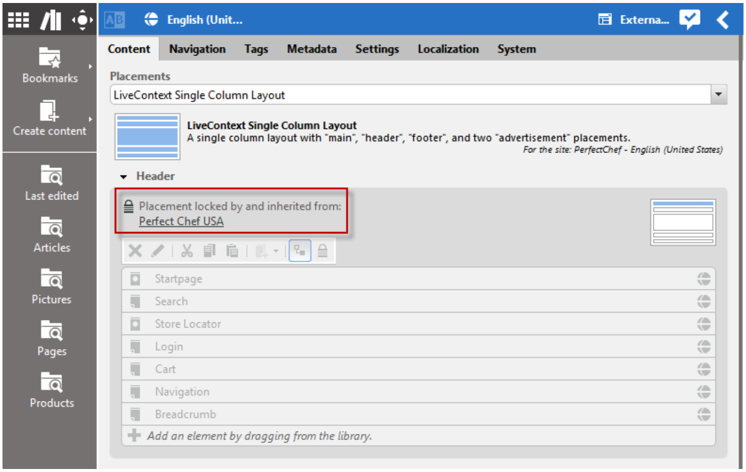


Figure 4.27. Locked Navigation Bar placement in a sub page

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.

Enable editing

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

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.

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.

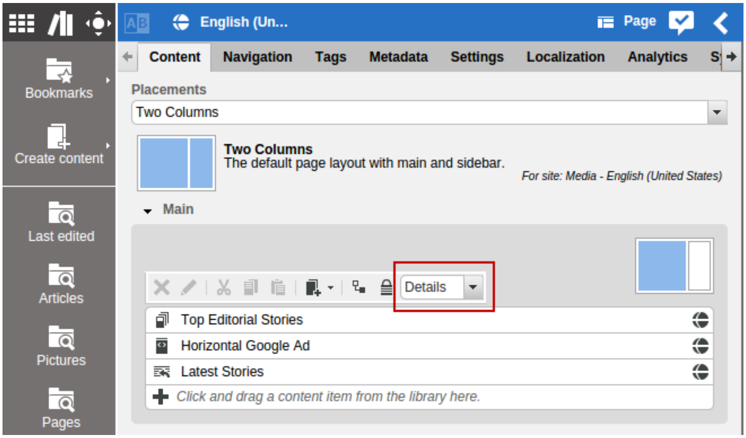


Figure 4.28. Selecting layout variant in placement of a Page content item

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* which is located in 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” [96] for details about layout settings.

You can use the *Create Content* 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. Click the **[Create Content]** icon in the Favorite Bar and select the **Page** entry. The page creation window opens up.

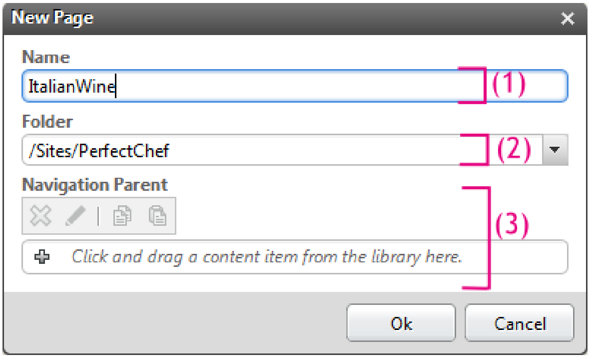


Figure 4.29. Page creation dialog

2. Fill the properties of the dialog with the appropriate values as described in Table 4.7, “Properties for the Page” [100].

Table 4.7. Properties for the Page

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

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. Proceed as follows:

1. Click the **[Create Content]** icon in the Favorite Bar and select the **Create from Template** entry. The *Create from Template* window opens up.

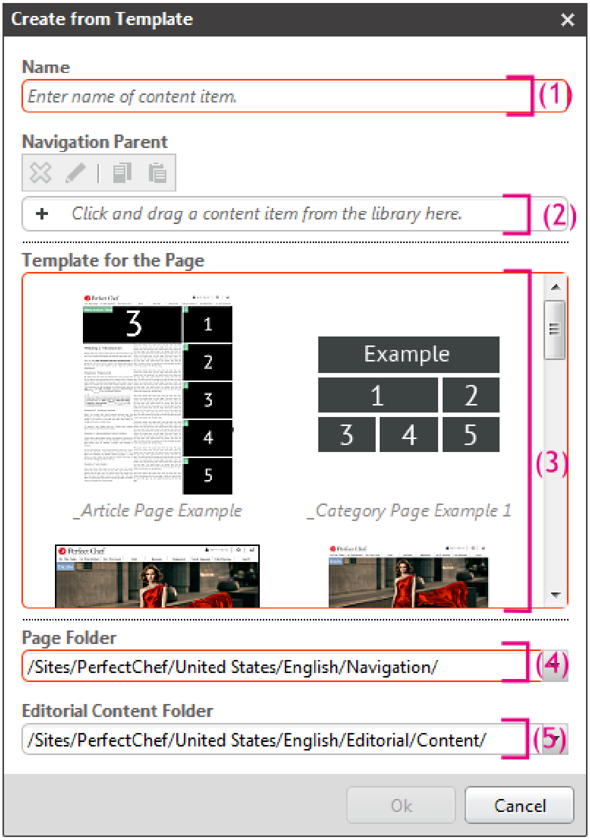


Figure 4.30. Create from Template dialog

2. Fill the properties of the dialog with the appropriate values as described in Table 4.8, "Properties for the Page" [102].

Table 4.8. Properties for the Page

Property	Description
Name [1]	Enter the name of the Page content item you want to create. The name will automatically be added to the *Page Folder* path below.
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.

Property	Description
Page Folder [4]	Enter the folder where the template page should be copied to. By default, the combo box is filled with the navigation path of the active site, followed by the name entered above. The folder must not exists yet.
Editorial Content Folder [5]	Enter the folder where linked editorial template content should be copied to. By default, the combo box is filled with the editorial path of the active site, followed by the name entered above.

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

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.

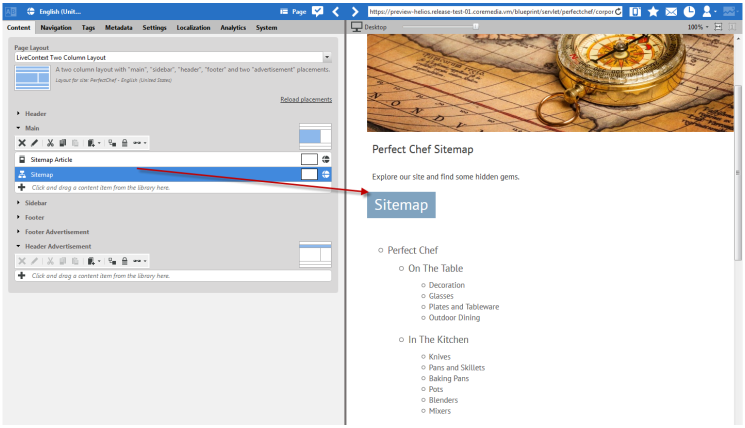


Figure 4.31. Adding a Sitemap

In the CoreMedia Perfect Chef example page, the `Sitemap` content is not directly linked to the Perfect Chef 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:

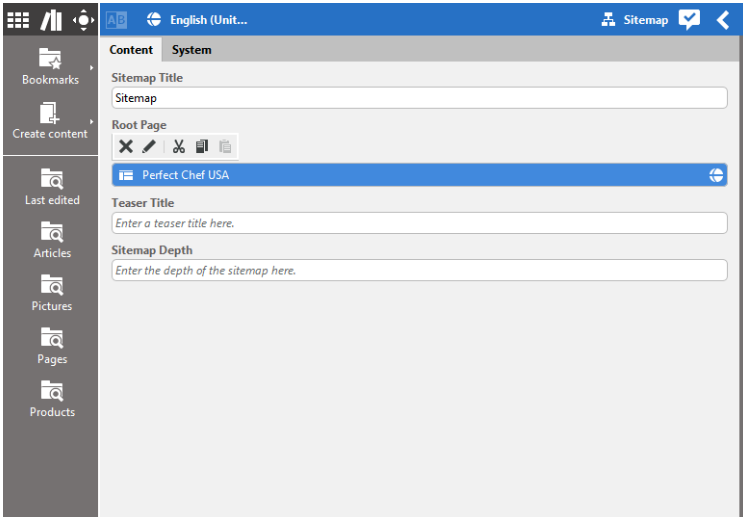


Figure 4.32. The Sitemap type

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 title to the *Teaser Title* 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 check the checkbox *Hide in Navigation and Sitemap* in the section *Visibility* in the the *Navigation* tab. Check *Only hide in Sitemap* when you want to hide the Page only from the 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” [105] describes how you check out and check in a content item.
- Section 4.6.3, “Editing Formatted Text” [109] shows you how to create formatted text.
- Section 4.6.4, “Editing Struct Properties” [123] 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” [128] shows you how to edit links to other content items using link lists.
- Section 4.6.6, “Managing Files” [132] shows you how you can insert binary data (images, video, audio ...) into your content items.
- Section 4.6.7, “Editing Images” [133] describes how you can edit images in *Studio*. For example, how you crop or flip an image.
- Section 4.6.8, “Editing Image Maps” [145] describes how you edit image maps.
- Section 4.6.9, “Editing 360°-Views” [149] Describes how you edit 360°-Views.
- Section 4.6.11, “Editing Top-N Lists” [152] describes how you edit Top-N lists. A feature from *Elastic Social*, which shows, for example, the 10 best rated articles.
- Section 4.6.14, “Time Dependent Visibility” [155] 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, “Metadata Management” [156] 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.

Table 4.9. Apply changes icons

Icon	Name
	Apply changes
	Restore content

Icon	Name
	Revoke changes

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.

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 **[Revoke changes]** .

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.

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 DXP 8* 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 12 icon. The view shows the two versions side-by-side. Changed fields are highlighted with a green border.

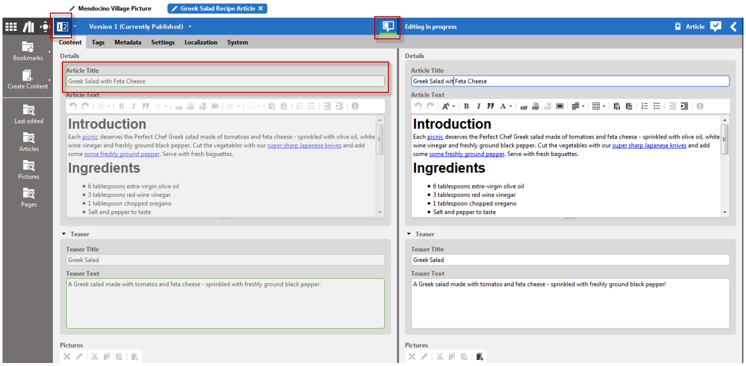


Figure 4.33. Comparison view

Getting a list of changed fields

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

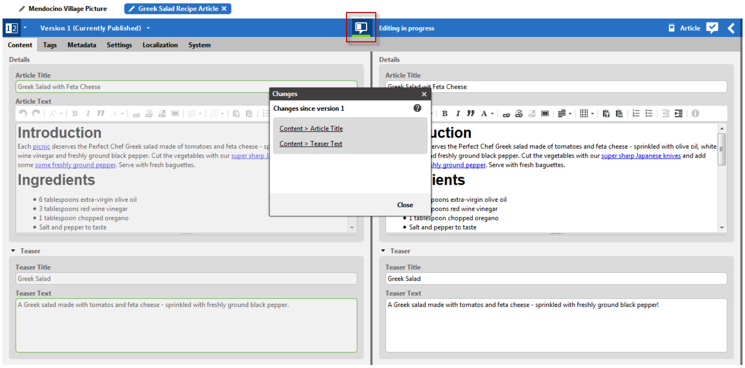


Figure 4.34. Get the list of changes

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.

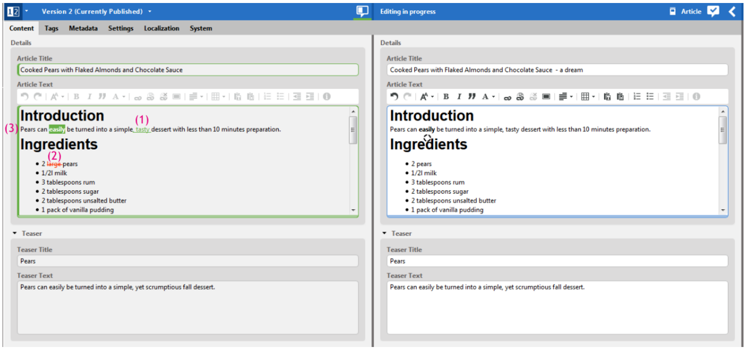


Figure 4.35. Rich text change highlighting

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.

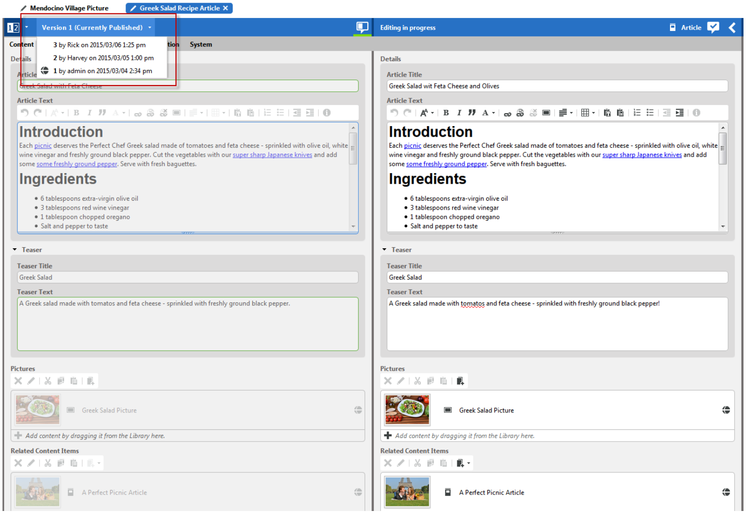


Figure 4.36. Selecting another version

4.6.3 Editing Formatted Text

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, etc. and fields for formatted text (3), which are used for full-length articles, for example.

In simple text fields, you can enter a specific number of characters without formatting. In fields for formatted text, 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 create formatted text items.

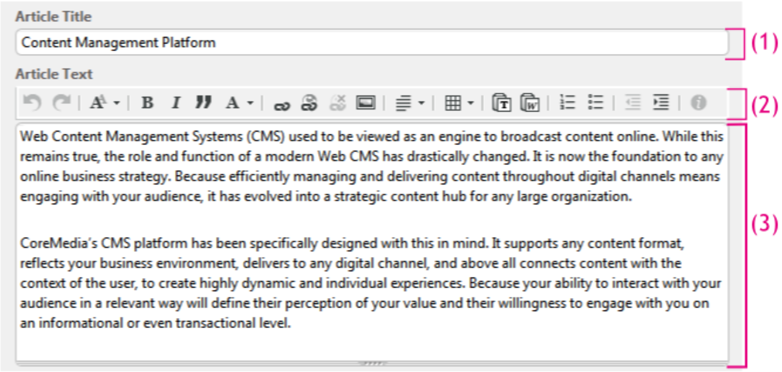


Figure 4.37. A simple text field and formatted text

You can use the integrated WYSIWYG editor to edit text in a way that is familiar from 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, strikeout, superscript or subscript text
- Format text blocks to be left-aligned, centered, right-aligned or justified
- Insert or delete external links
- Create tables
- Paste content from the clipboard
- Paste formatted text from Word
- Create numbered lists
- Create bulleted lists
- Increase or decrease text indents
- Inserting images

Pasting Content from the Clipboard

CoreMedia Studio supports the pasting of content from the clipboard. This content may be simple text without formatting or text content pasted from Word, containing simple formatting. The following Word formatting styles are supported:

- Paragraphs
- Bold, italic

Table 4.10. Icons for pasting

Icon	Name
	Paste as plain text
	Paste from Word

Pasting text

You can paste copied text either using the standard keyboard shortcut **<Ctrl>+<v>** or by using the icons shown in the table.

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. Click the *Paste as plain text* icon or the *Paste from Word* icon.

Depending on your browser's security settings, the text will either be pasted directly or an input box will open:

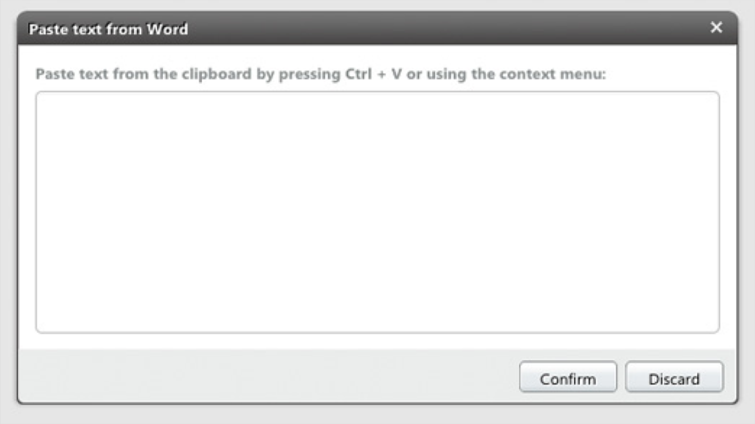


Figure 4.38. Paste Content

4. Click in this input box and paste the content of the clipboard by pressing **<Ctrl>+<v>**.
5. In the box, you can see how the text will look when pasted. Click **[Confirm]** in order to paste your text.

The text is now pasted to your text field.

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

Table 4.11. Paragraph symbols

Icon	Name
	Style
	Quote
	Left-aligned

Icon	Name
	Centered
	Right-aligned
	Justified
	No alignment
	Numbered list
	Bulleted list
	Decrease indent
	Increase indent

Applying a style

1. Position the cursor in your chosen paragraph.
2. Click the *Style* icon (1).
3. Select your chosen style from the list.

Your paragraph now appears in the new style.

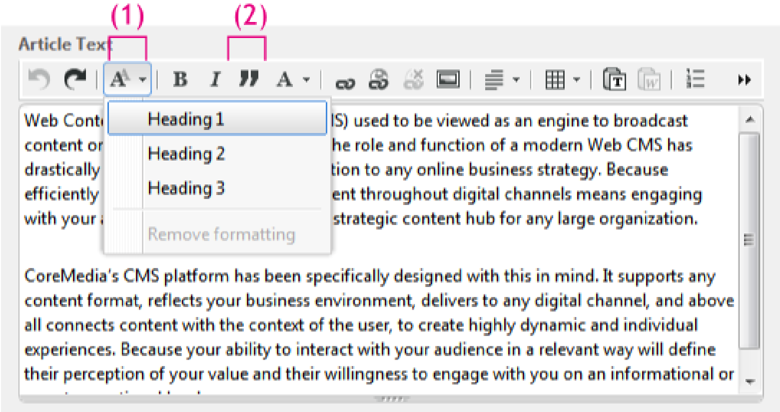


Figure 4.39. Paragraph styles

Formatting as a quote

1. Position the cursor in your chosen paragraph.
2. Click the *Quote* icon.

The paragraph is now highlighted as a gray block.

Formatting as a list

You can format paragraphs as lists. You have the option of formatting paragraphs as bulleted lists or as numbered lists. In addition, 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 bullets icon.

Your paragraphs now appear as a list.

Changing the indention of list elements

1. Position the cursor in your chosen list item.
2. Click the *Increase indent* or *Decrease indent* icon.

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

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. Now select the appropriate icon from the toolbar.

Removing an alignment

To remove any alignments you have set, proceed as follows:

1. Position the cursor in your chosen paragraph.
2. Now select the *No alignment* icon from the toolbar.

Using Character Styles

You can style words and characters using the following formats:

- Bold
- Italic
- Underline
- Strikeout
- Superscript
- Subscript

To do so, the following icons are used:

Icon	Name
B	Bold
I	Italic
A	Format text

Table 4.12. Text formatting icons

Formatting text

1. Mark the text that you wish to format.
2. Click the corresponding icon. When you click the *Format text* icon, this will open a dropdown box (1).

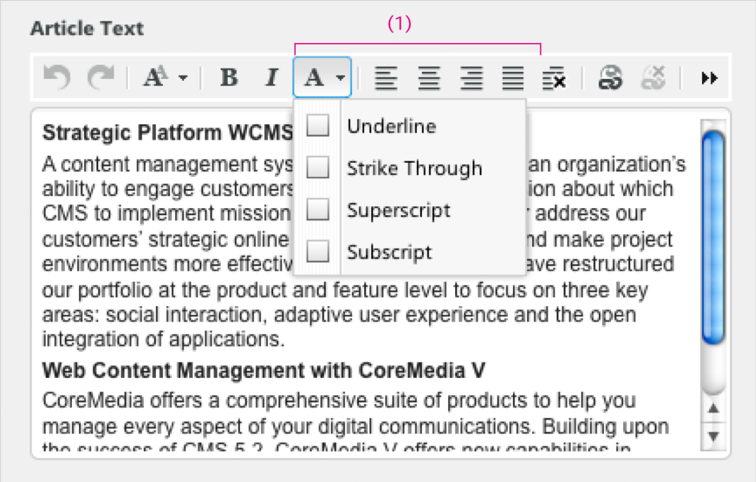


Figure 4.40. Choose a style

3. Select your chosen format(s).

Your text is now formatted.

Editing Links

When you use formatted text, you can create and delete links to external websites or other content items in the repository.

Table 4.13. Link editing icons

Icon	Name
	Create link
	Delete link
	Create internal link

Creating external 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 *Create link* icon.

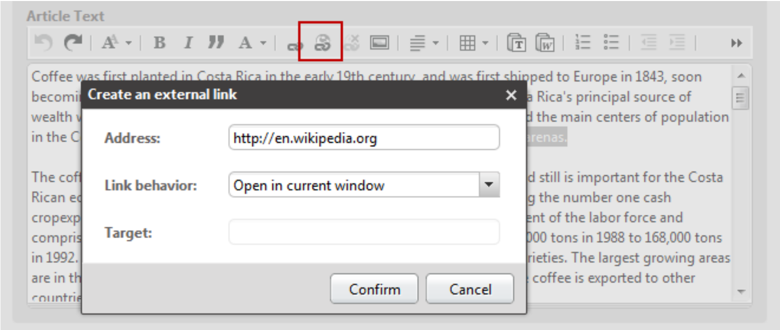


Figure 4.41. Enter the link data

3. Enter the URL in the address field (without protocol, "http://", for example).
4. In the *Link Behavior* field, specify how the link should be opened. Here, you can choose between:

- *Open in current window* – the target link replaces the web page currently shown
- *Open in new window* – the target link will be opened in a new browser window
- *Open embedded* – the target link will be opened within the current page
- *Open in a 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.

5. Now click **[Confirm]** .

The link is created in your text.

Deleting external links

1. Position the cursor within the link text.
2. Click the *Delete link* icon.

Your link is now deleted. However, your link text will not be affected.

Creating internal 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 *Create link* icon.

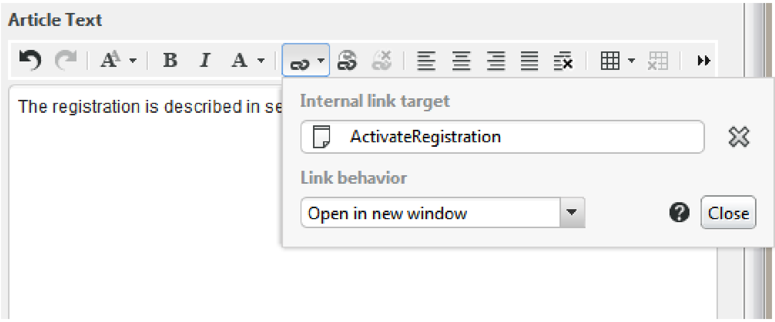


Figure 4.42. Enter the link data

3. Select the content item to which you want to link in the library and drop it on the *Internal link target* field.
4. In the *Link Behavior* field, specify how the link should be opened. Here, you can choose between:

- *Open in current window* - the target link replaces the web page currently shown
- *Open in new window* – the target link will be opened in a new browser window
- *Open embedded* – the target link will be opened within the current page
- *Open in a 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.

5. Now click **[Close]** .

The link is created in your text.

Deleting internal links

1. Position the cursor within the link text.
2. Click the *Delete link* icon

Your link is now deleted. However, your link text will not be affected. You can also delete the link from within the link creation dialog using the x icon.

Editing tables

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

You can make use of the following functions:

- Creating and deleting tables

→ Inserting and deleting rows and columns

Table 4.14. Table editing icons

Icon	Name
	Table menu
	Delete table
	Insert row above
	Insert row below
	Delete row
	Insert column to the left (before)
	Insert column to the right (after)
	Delete column

Creating a table

1. Position the cursor at the location where you want to insert a table.
2. Click the *Create table* icon (1) and select **Insert table**.

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

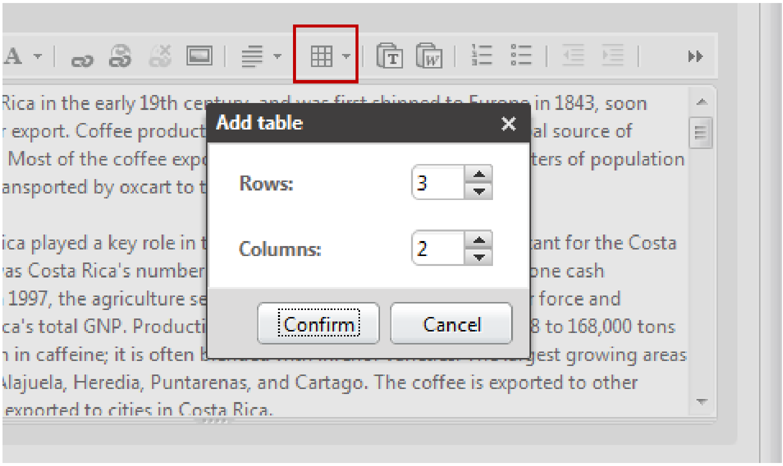


Figure 4.43. Enter size of table

3. Specify the size of the table and click **[Insert]** .

The table now appears in your formatted text field.

Deleting a table

1. Position the cursor in the table.
2. Click the *Delete table* icon.

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

Inserting rows and columns

1. Position the cursor within a cell in your chosen column or row.
2. Click the *Table menu* icon.

You now have the following options:

- *Insert row above*
- *Insert row below*
- *Insert column to the left (before)*
- *Insert column to the right (after)*

3. Select the corresponding command from the menu.

Deleting rows and columns

1. Position the cursor within a cell in your chosen column or row.
2. Click the *Table menu* icon.
3. Select **Delete row** or **Delete column** from the menu.

Inserting And Editing Images

When *CoreMedia Studio* is accordingly configured, you can drag and drop images from the library into a formatted 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 image

1. Position the cursor at the position where you want to insert the image.
2. Find the image in the Library.
3. Drag the image with pressed left mouse button over the formatted text field
4. Release the mouse button.

The image appears in the text field.

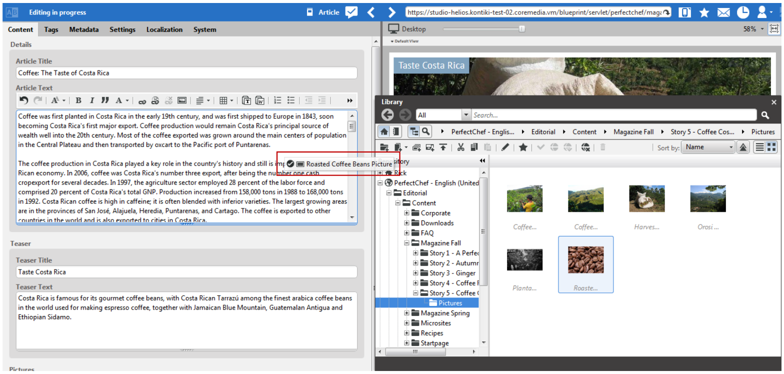


Figure 4.44. Drag image into a formatted text field

Deleting image

You can delete an image like an ordinary text character.

Editing image

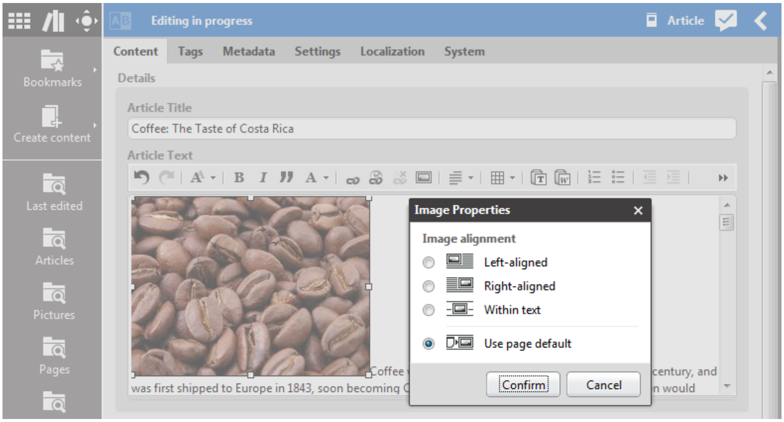


Figure 4.45. Editing an image

You can edit the position of the image in a formatted text field. Call the corresponding window with the *Image Properties* Icon. You have the following options in the window:

- Left-aligned
- Right-aligned
- Within text
- Use paged default

Table 4.15. Image Properties icon

Icon	Name
	Image Properties

Position the image as follows:

1. Click the image in the formatted text field.
2. Right click the image and select **Image Properties** from the context menu or click the *Image Properties* Icon. The *Image Properties* dialog opens up.
3. Select the appropriate position and click **[Confirm]** .

The image will be accordingly positioned in the text field. How the image is shown in the preview, depends on your system configuration.

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 3.2.8, “Configuring *Elastic Social*” [65]).

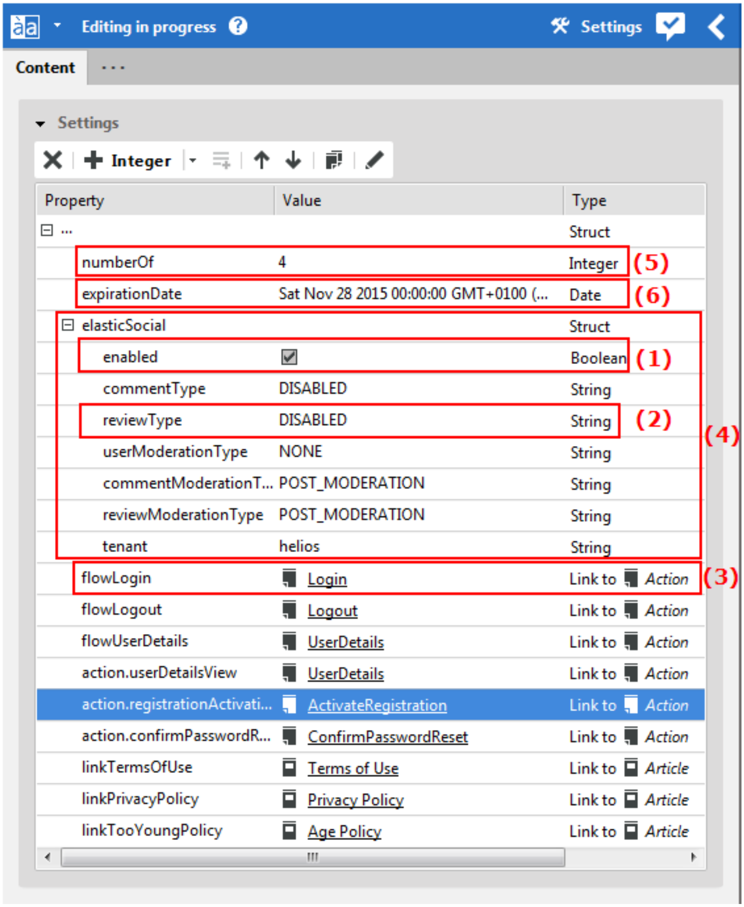


Figure 4.46. Struct editor in a Settings content item

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

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 (5) 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.

Table 4.16. Struct editor icons

Icon	Name
	Remove item
	Duplicate
	Move up
	Move down
	Add item to `List`
	Open linked item in tab

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

String, integer or Boolean 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.

Link 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`.

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, then the link will be removed.

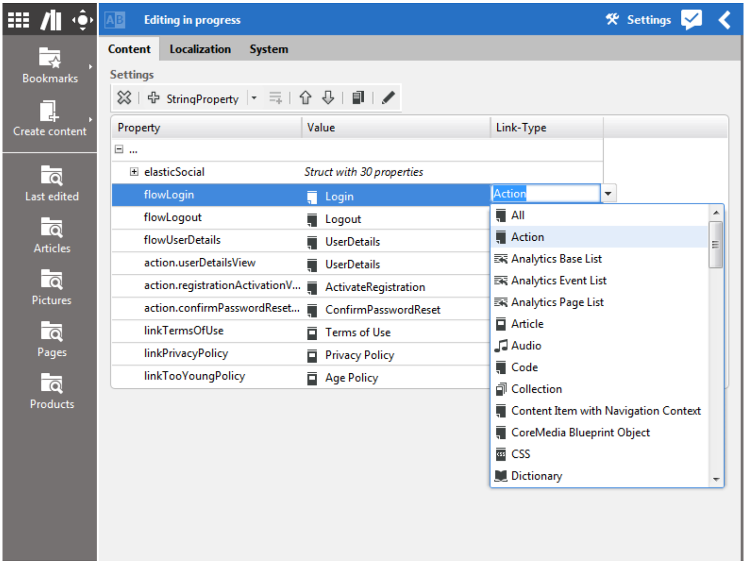


Figure 4.47. Select content type for Link

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.

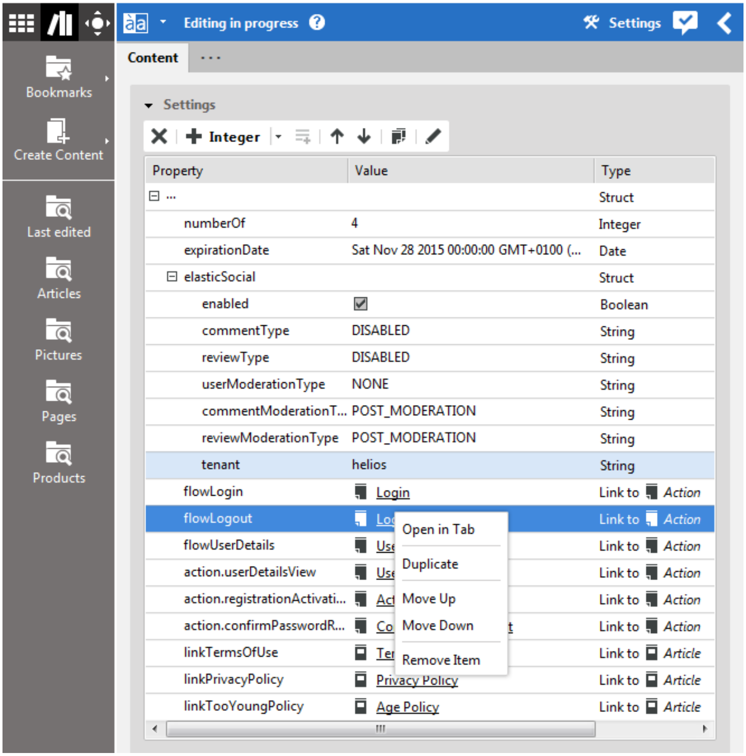


Figure 4.48. Context menu for struct entry

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. 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`.

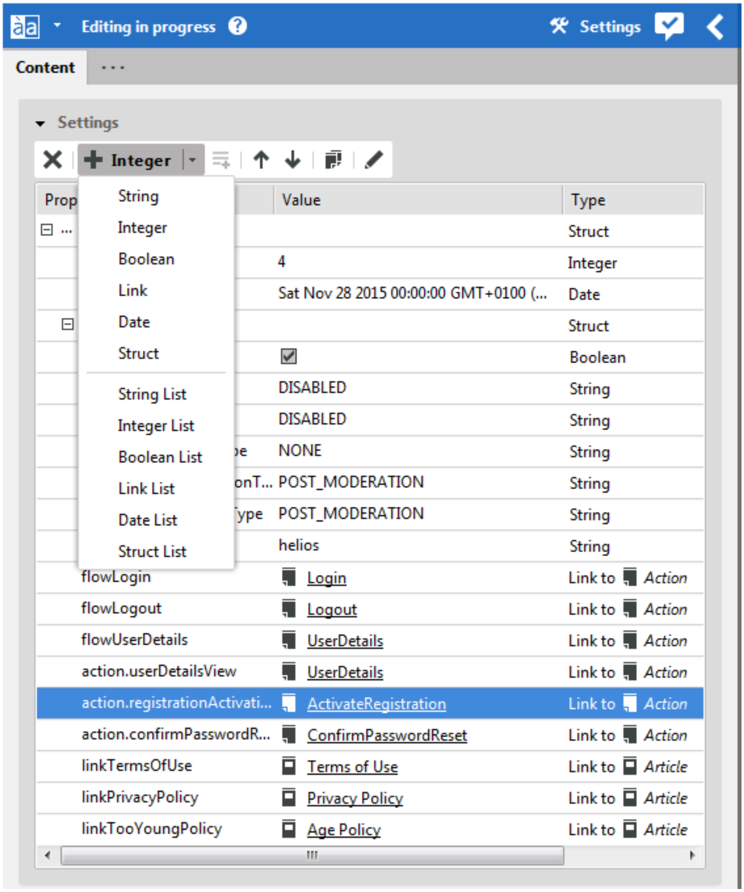


Figure 4.49. A Split button with available options

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`.

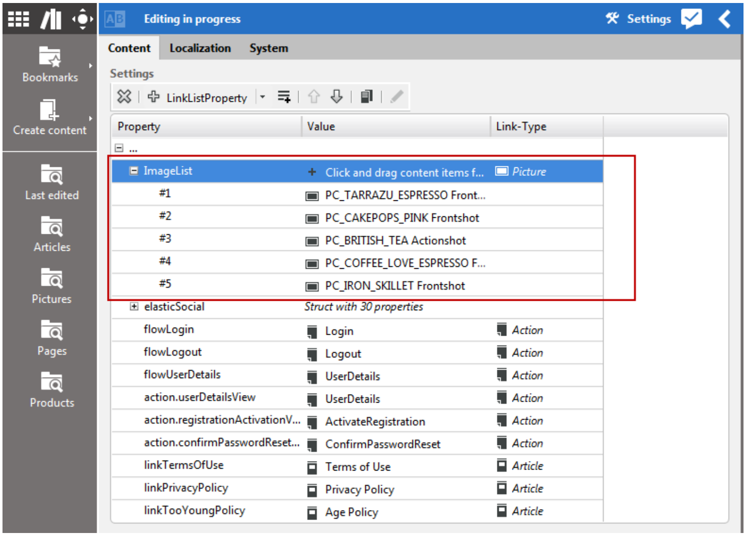


Figure 4.50. LinkList with several entries

Creating several entries

If you want to create several list property entries quickly, create all entries with the *Add item to ListProperty* icon. Then select the first element, click **F2** to enter the value field, add the value and click **Tab**. This will move the cursor to the *Value* field of the next entry.

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

Table 4.17. Names of link list icons

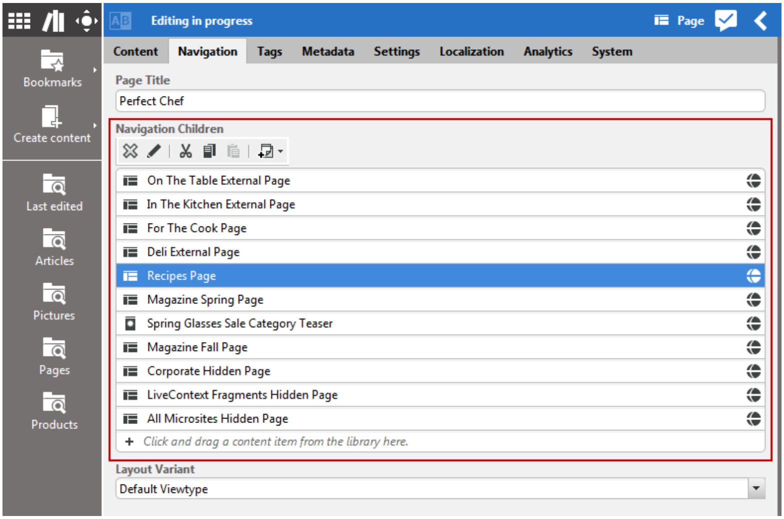


Figure 4.51. Example of a link list

Choosing Content

CoreMedia Blueprint contains a link list chooser that offers you all possible selections in one list. You can check all elements you want to add at once. It is used for example in the *Settings* tab of the Page content item.

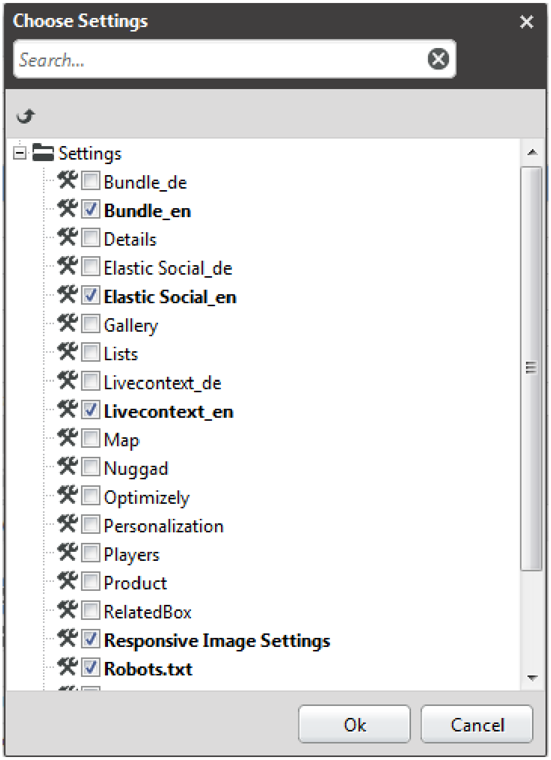


Figure 4.52. Choosing content

Inserting a link

There are different ways to insert a link into a link list.

Drag and Drop

1. Click on the link list field, which is marked with the plus sign.

   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

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.

Copying a link

You can copy a link from a link list and paste it into other link lists or the library. Mark the link and click the **[Copy]** icon.

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.

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 Content** menu to create a content item from an external file as described in Section “Uploading Files” [91].

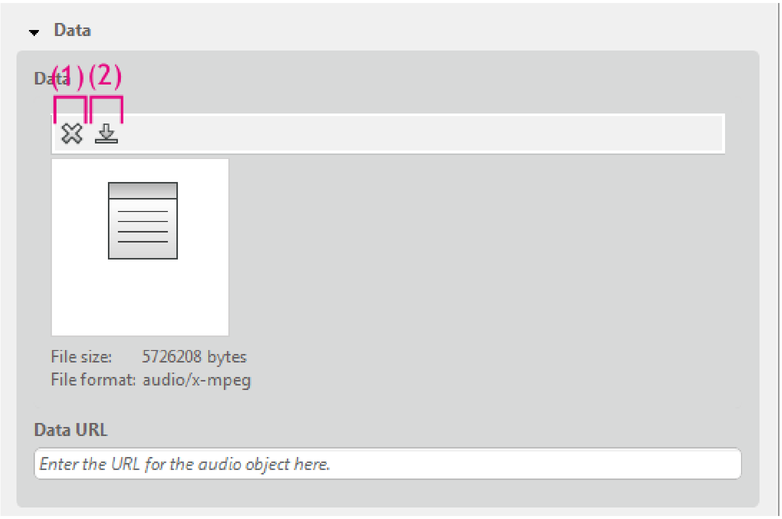


Figure 4.53. A field for external files

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. 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.

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 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 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 4.54, “Cropping images” [134]) 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 normal crop could be shown in an article on your website while the thumbnail crop is shown in a teaser. Where a crop is actually shown depends on your specific CoreMedia system configuration.

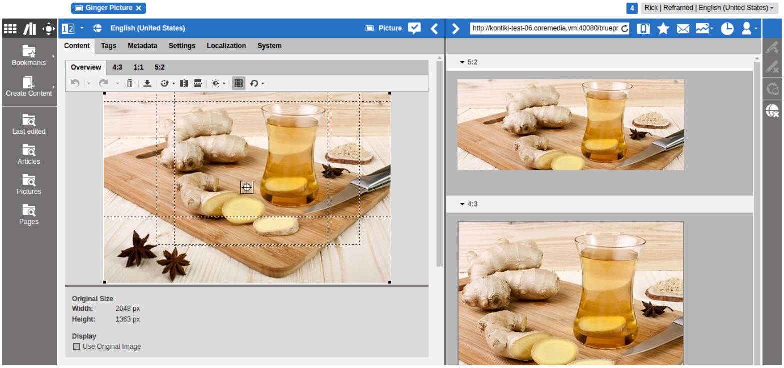


Figure 4.54. Cropping images

The Selection Frame

CoreMedia Studio uses a specific concept to couple the selection frames 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. The default is that all frames have a common center and can only be moved or cropped together. The common selection area is highlighted by the solid frame. If this area is smaller than the image, then the image outside the selection area appears darker. You can use this common selection area to create all crops of an image at once.

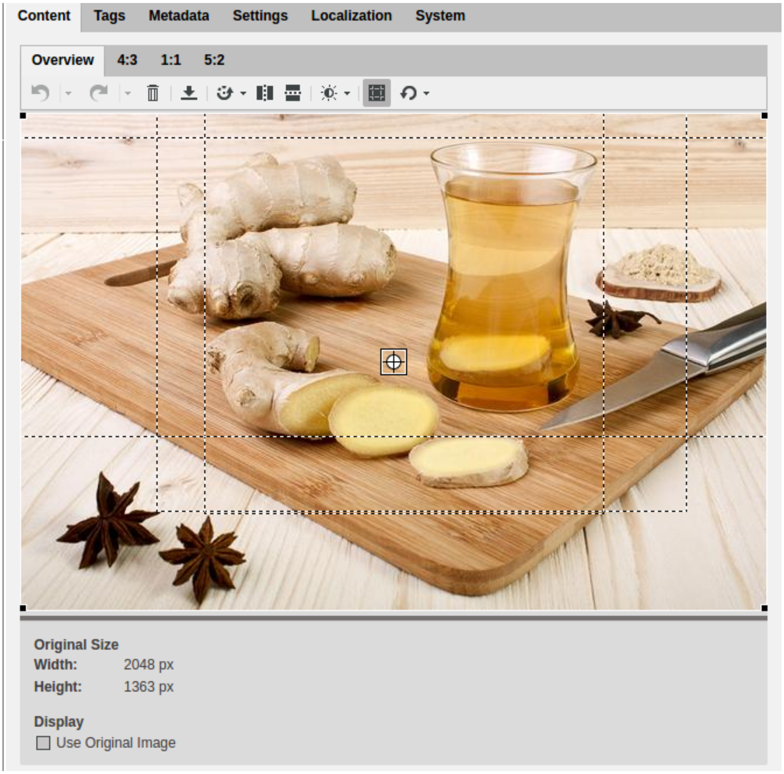


Figure 4.55. Overview with all selection frames

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. In the latter case, the square symbol that indicates the common center and the cross hairs that indicates the center of the decoupled crop will not be superposed.

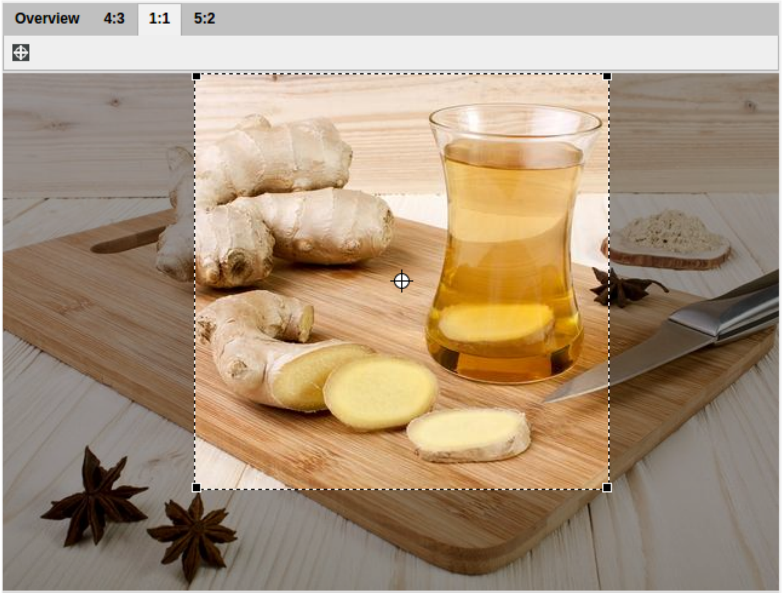


Figure 4.56. Decoupled centers

If a crop falls below the minimal width, its selection frame and label will be shown in red and a warning message will be displayed in the list of content warnings and errors (see Section 2.8, "Validators" [42]). You can still publish the content item, but you have to expect suboptimal image quality.

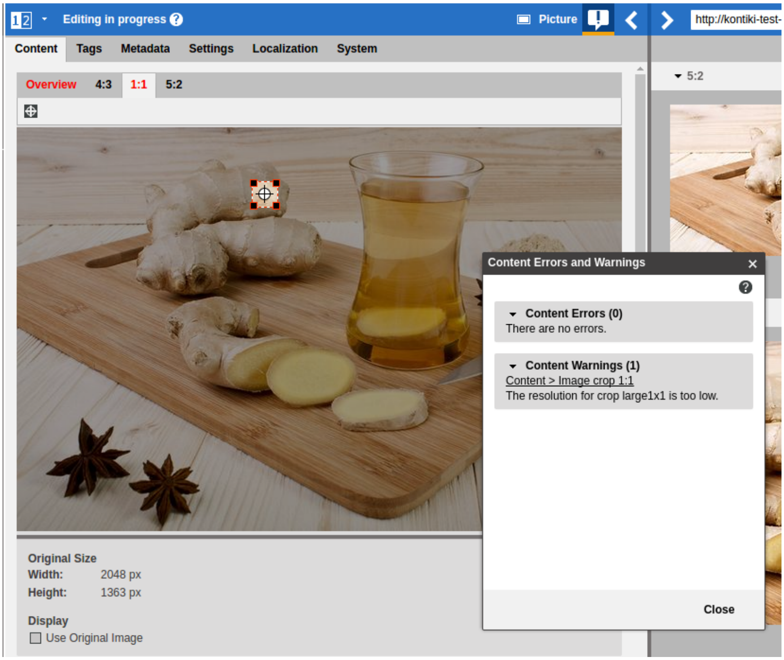


Figure 4.57. The crop is too small

Cropping Images

CoreMedia Studio enables you to define 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” [133]). Of course, these settings can be changed, you should ask the person in charge for the CoreMedia system for support.

Most of the cropping work is done using the selection frames, in addition there are some buttons and icons:

Table 4.18. Buttons for cropping images

Icon	Name	Description
	Reset all focal points and crops	All selection frames have a common center, are coupled and the size has been maximized.
	Reset focal point	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.

Icon	Name	Description
		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.

Table 4.19. Icons for the centers of the selection frames

Icon	Name
	Common center of the common selection frame and one or more specific selection frames.
	Center of a specific selection frame.
	Center of the common selection frame.

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.

Defining the position of a crop

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

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.

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:

Table 4.20. Icons for flipping and rotating

Icon	Name
	Flip the image along the horizontal axis
	Flip the image along the vertical axis
	Rotate menu
	Rotate 90 degrees left
	Rotate 90 degrees right

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.

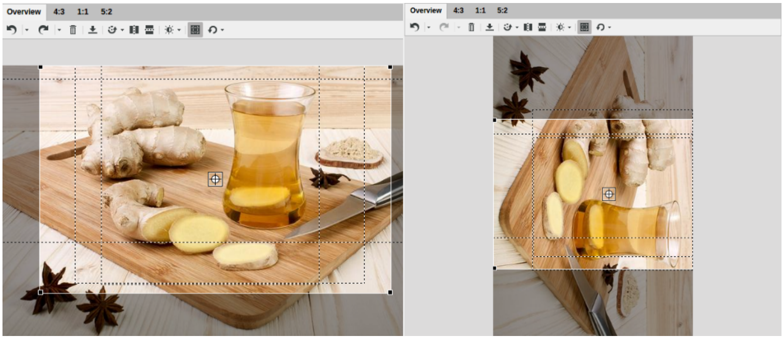


Figure 4.58. Effect of rotation on the selection frames

Revert changes

If you want to recover the original orientation of the image, simply click the **[Reset]** button.

Changing Exposure

CoreMedia Studio lets you adjust the exposure of an image to improve the quality.

Table 4.21. Icon for exposure changes

Icon	Name
	Change exposure

Figure 4.59. 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.

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.

Table 4.22. Icons for undo and redo

Icon	Name
	Undo
	Redo

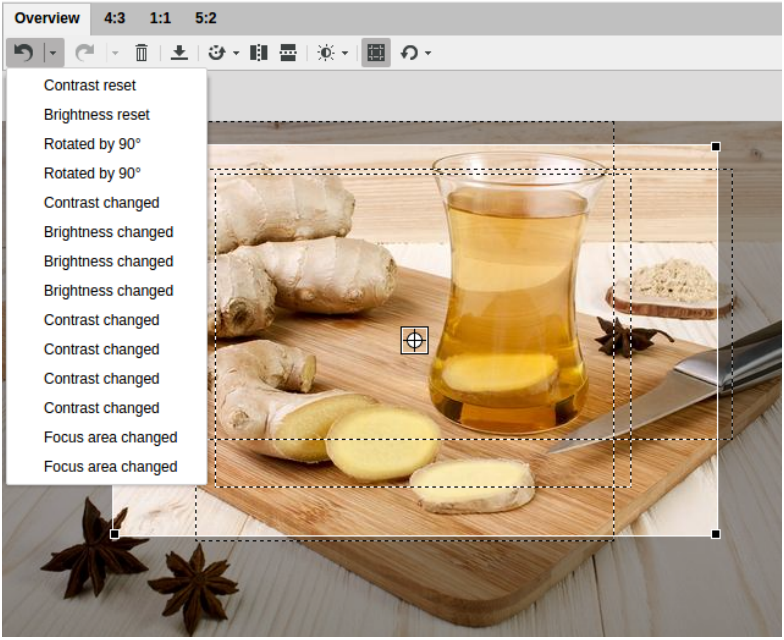


Figure 4.60. Undo steps

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.

If you click in the change list, for example, the **Rotate by 90°** entry, **Brightness** and **Contrast** would also be undone.

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:

1. 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 document 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.

Table 4.23. Icon for resetting to inital state

Icon	Name
	Reset to Initial State

1. Click the *Reset to Initial State* icon and select *Reset to Initial State* from the menu.

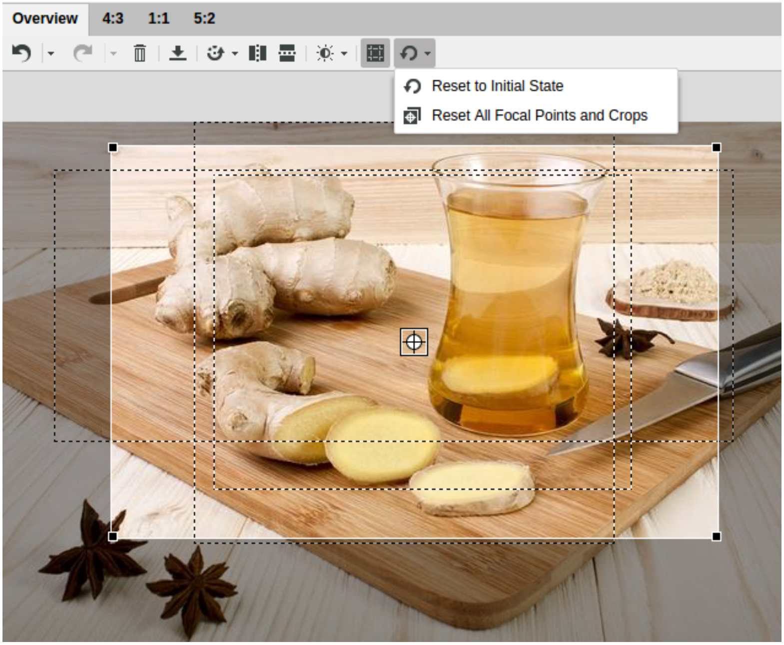


Figure 4.61. Reset to initial state

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

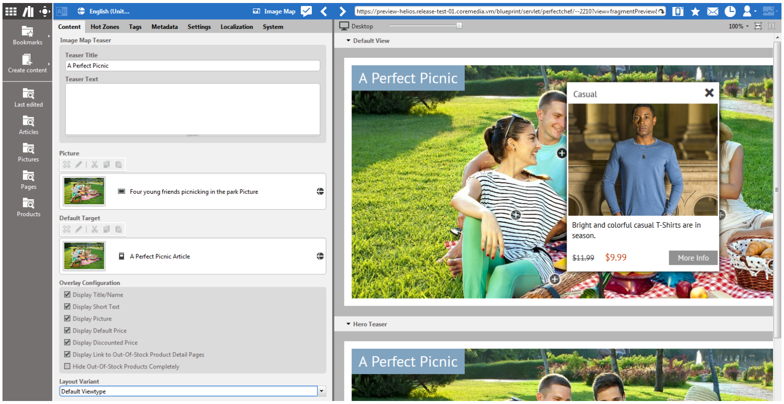


Figure 4.62. Hot Zones in an image map (pop-up)

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.

Image Figure 4.63, “Hot Zones in an image map (inline)” [146] shows an image map with a hot zone configured as inline overlay. For hot zones displayed as inline overlay, a theme can be configured per hot zone.

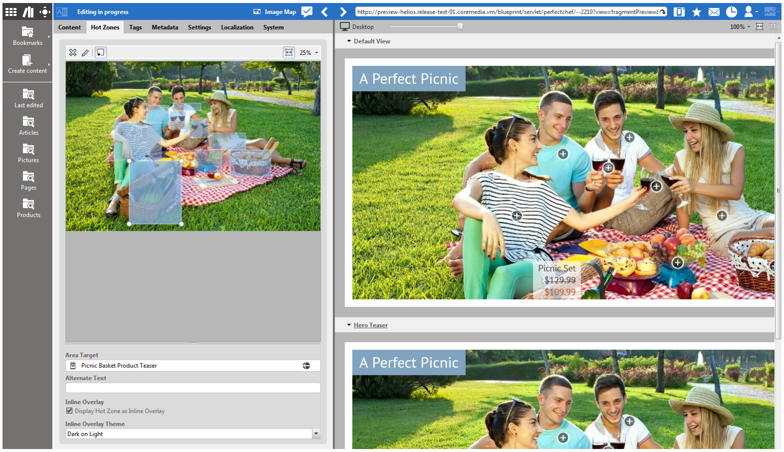


Figure 4.63. Hot Zones in an image map (inline)

In addition to the common properties inherited from `CMTeasable` you can configure how the hot zones' overlays are displayed.

Image Figure 4.64, “Configuring image maps” [147] shows the configuration options for image maps.

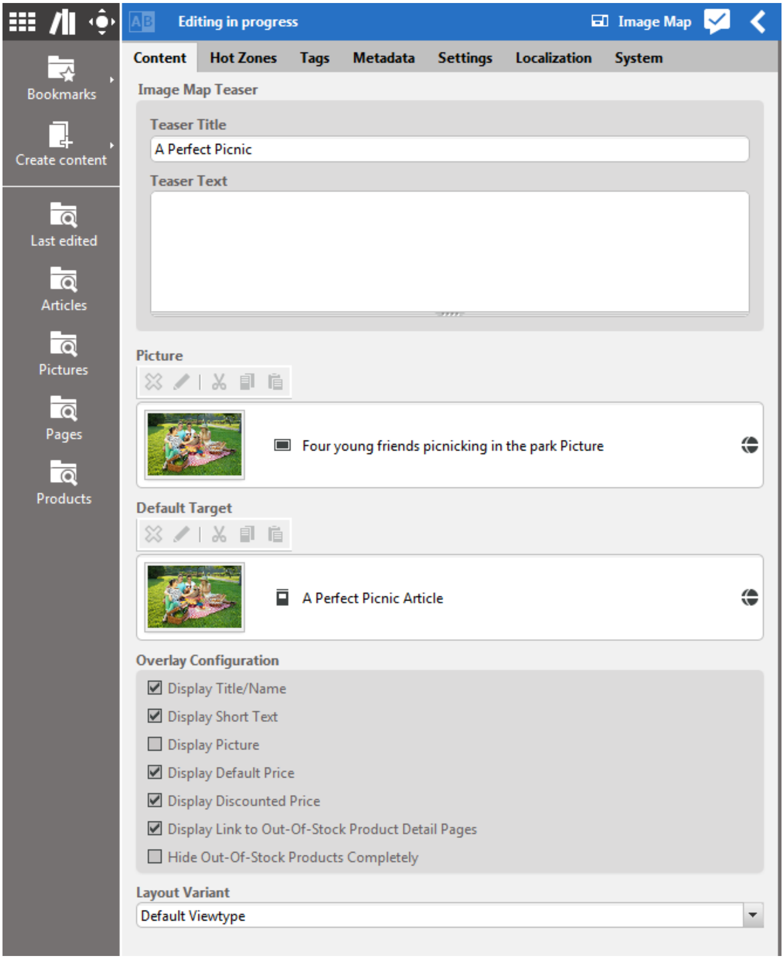


Figure 4.64. Configuring image maps

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 of 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. Create a default target for your image map. This content will be opened when no hot zones are available and you click on the image. This can happen due to the responsive layout, for example on a mobile phone. Simply drag a content item to the *Default Target* field.
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 Figure 4.64, "Configuring image maps" [147].
6. Now, you can start defining the hot zones as described in the next subsection.

Defining Hot Zones

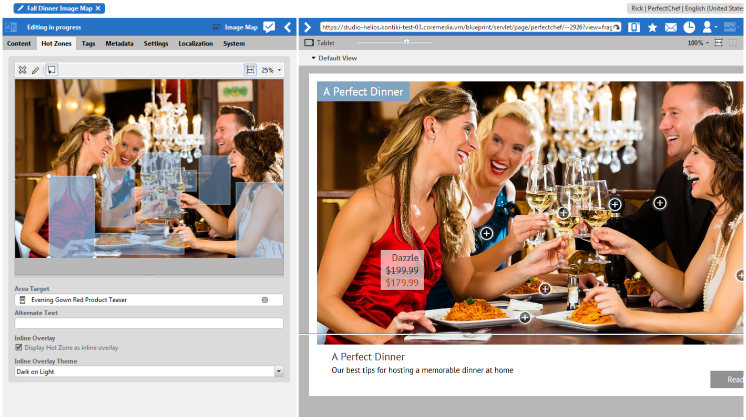


Figure 4.65. Creating hot zones with an inline overlay zone selected for editing

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. As you can see in Figure 4.63, "Hot Zones in an image map (inline)" [146] the linked document is displayed as a pop-up when you click on the hot zone in the document's preview panel. Note that hot zones that are not yet linked to a document are not visible in the document'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.

> In the *CAE* hot zones of `CMImageMap` are only rendered if they are added to a `CMCollection` with view type `Slideshow` or `Top Story Landscape`. 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 Editing 360°-Views

> **CoreMedia LiveContext 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 "Adding Content with the Asset Widget" [251]).

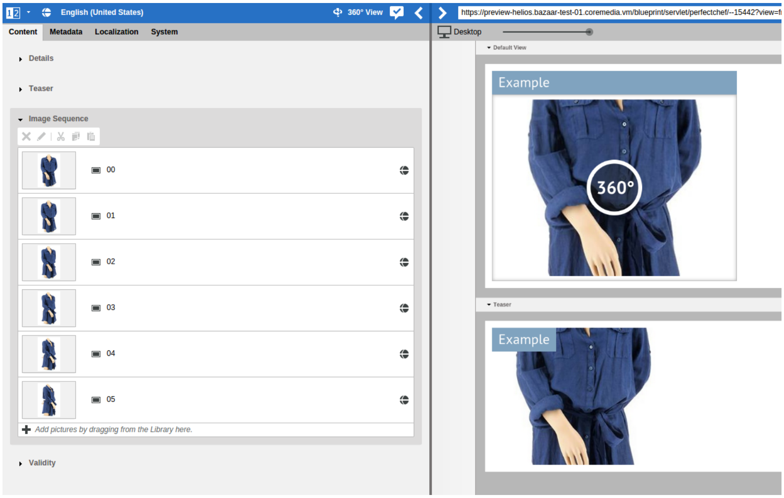


Figure 4.66. Images of a dress with a slight counter-clockwise rotation

4.6.10 Editing Shoppable Videos

CoreMedia LiveContext 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 acessoires 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:

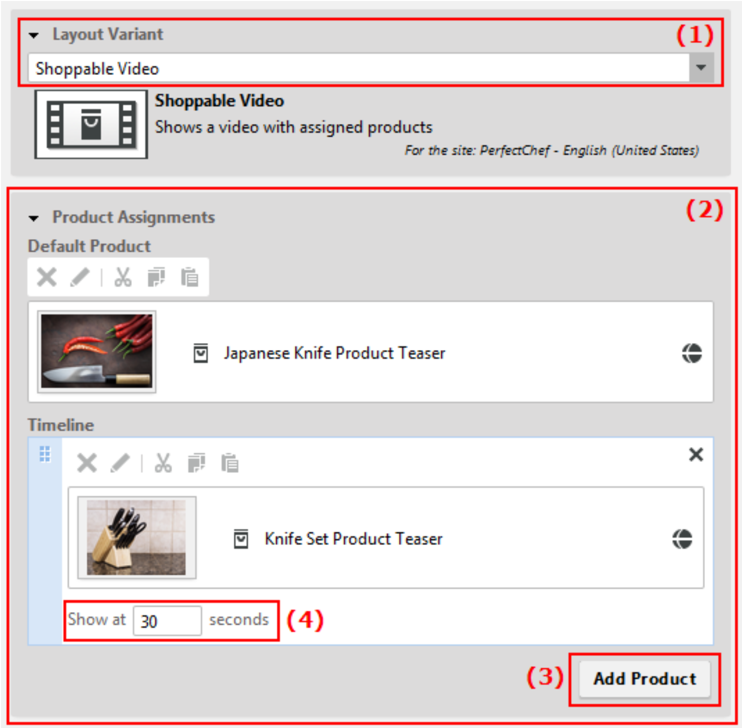


Figure 4.67. The shoppable video editor

1. In the *Content* tab open the *Layout Variant* field 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. Click **[Add Product]** (3) and drag a product to the link list in the editor that opens in the *Timeline* field.
4. 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.

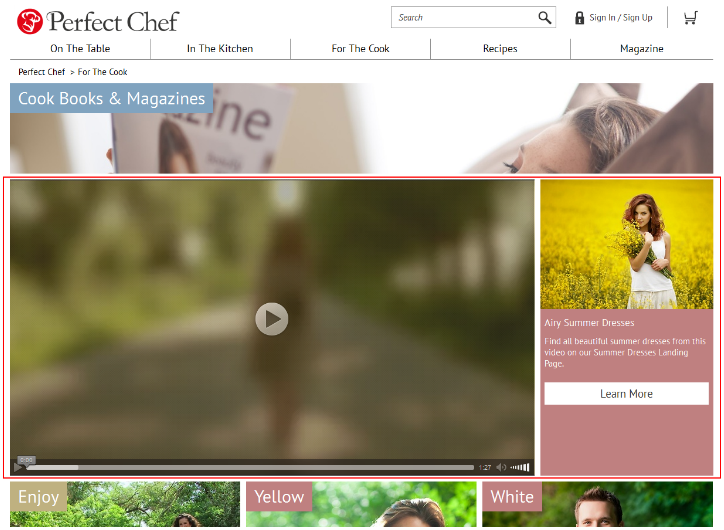


Figure 4.68. Site preview with shoppable video

4.6.11 Editing Top-N Lists

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:

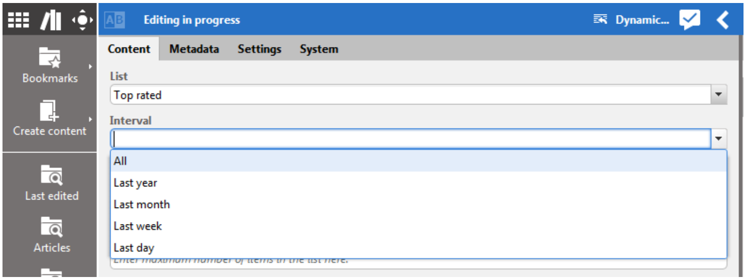


Figure 4.69. Dynamic Elastic Social List

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.

4.6.12 Setting a Call-to-action Text

CoreMedia Corporate Feature

For a teasable content, you might define a call-to-action button. 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.

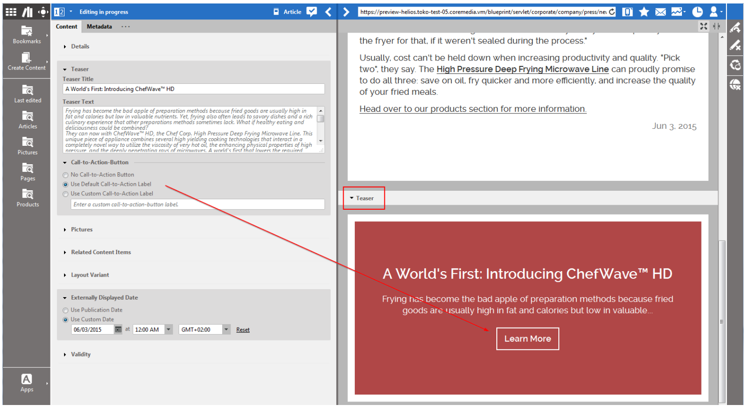


Figure 4.70. Call-to-action button in teaser view

Open the *Content* tab of the content and in the *Teaser/Call-to-Action-Button* field select the option you want to use.

No Call-to-Action Button	No call-to-action Button is shown
Use Default Call-to-Action Label	A call-to-action button with default text is shown.
Use Custom Call-to-Action Label	The text that you enter in the text field is shown in the call-to-action button.

4.6.13 Setting an External Date

CoreMedia Corporate Blueprint Feature

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 an externally displayed date.

Open the *Content* tab of the content and in the *Externally Displayed Date* field select the option you want to use.

Use Publication Date	Use the date of the last publication.
Use Custom Date	Enter the date that should be shown.

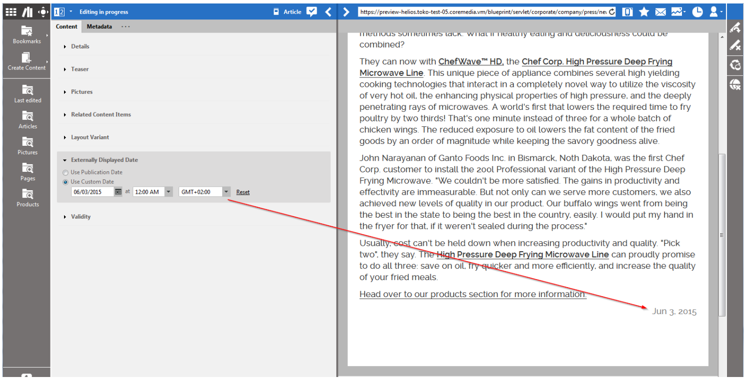


Figure 4.71. Setting an external date

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 most of the content items have in the *Metadata* tab a field *Validity* with the *Valid From* and *Valid To* properties.

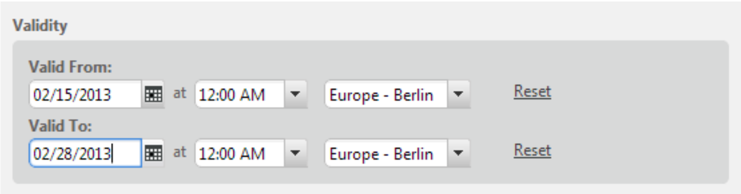


Figure 4.72. The Validity field

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.

Table 4.24. Time dependent visibility icon

Icon	Name
	Show preview for a specific time

Check the time settings

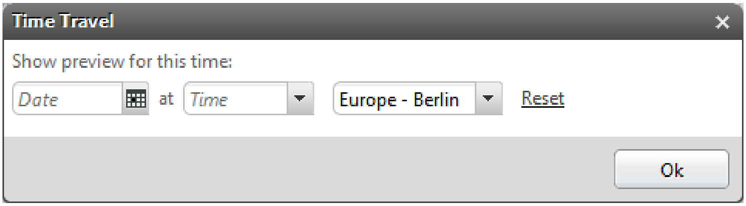


Figure 4.73. Time Travel dialog

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.
3. When you are satisfied with your result, click **[Reset]** and close the dialog.

4.6.15 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 “Creating Content Queries” [89]) for the Query List editor. Content items are only shown, when they are categorized as "Salad".

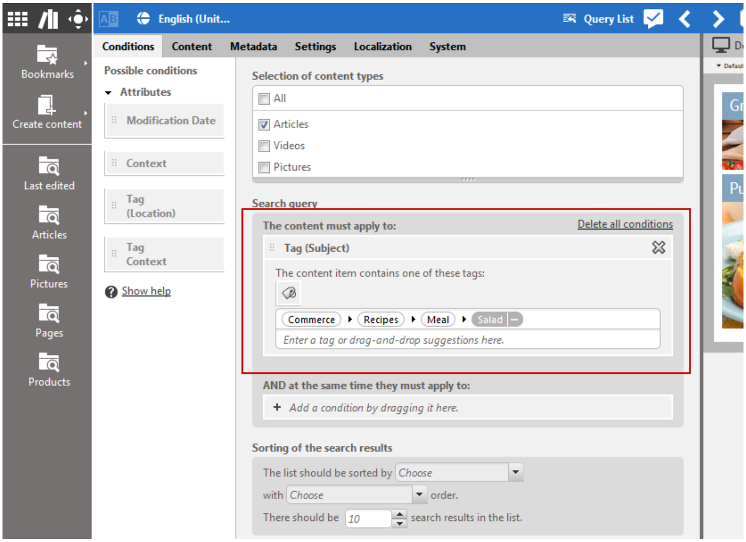


Figure 4.74. Query List with taxonomy condition

CoreMedia Blueprint supports subject taxonomies for information about the content's topic while location taxonomies associate content with a location.

Table 4.25. Taxonomy icons

Icon	Name
	Choose Tag
	Add Child Tag

Categorizing Content

You can add tags from a predefined taxonomy to a content item.

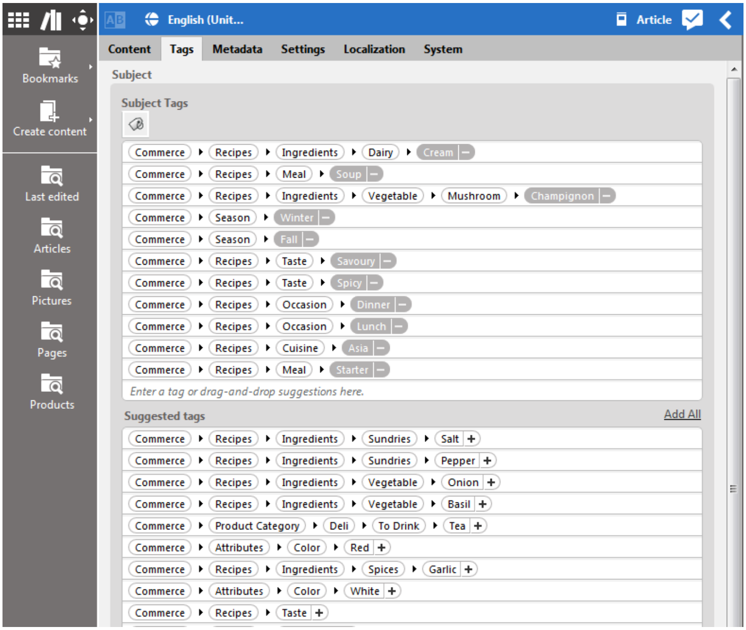


Figure 4.75. Categorized Article

There are three ways:

- Select an entry from the *Suggestions* 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.

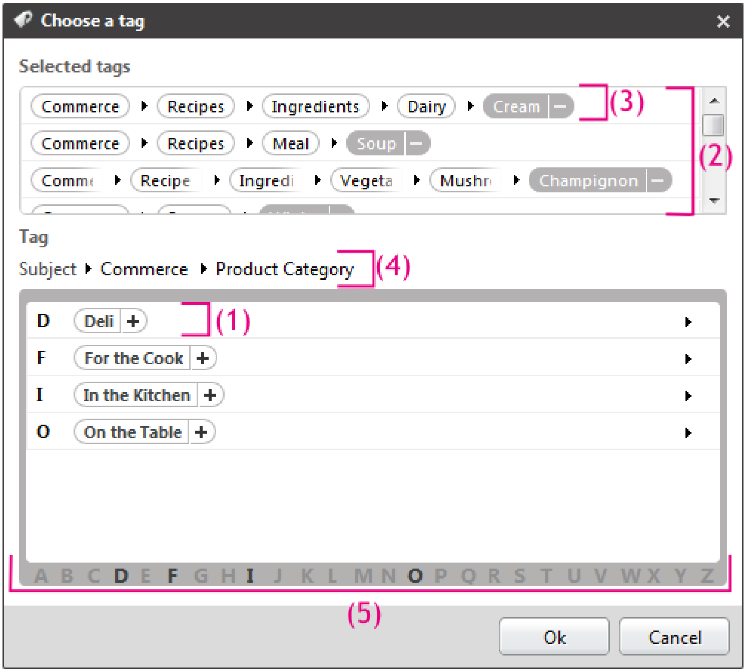


Figure 4.76. Tag chooser

Using the Tag chooser

All available options are shown in the *Tag* 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 or through a semantic analysis using (OpenCalais). To this end, the content of the fields *Title*, *Detail Text*, *Teaser Title* and *Teaser Text* is used.

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.

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".

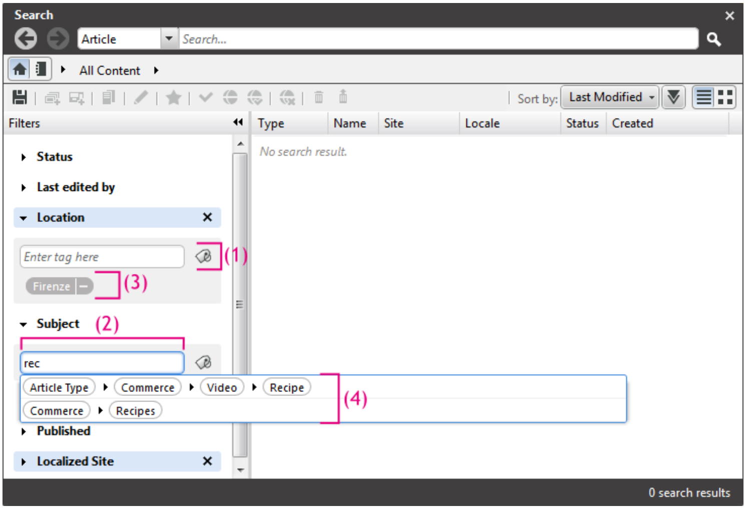


Figure 4.77. Taxonomy filter in the Library

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.

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.

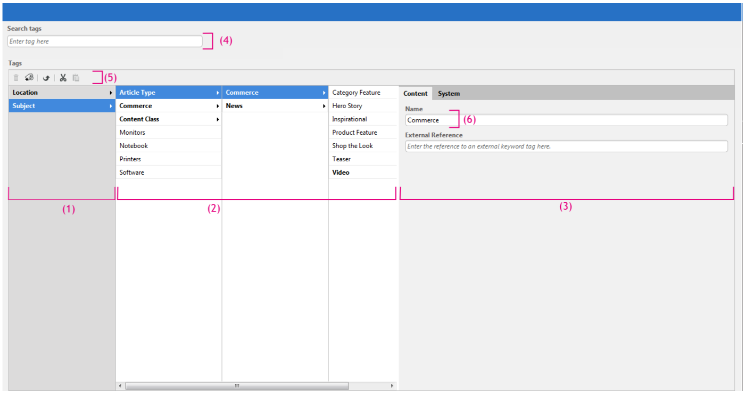


Figure 4.78. The taxonomy editor

Taxonomy entries are stored as content items from type `Tag` or `Location`.

Opening the taxonomy editor

Open the **Apps** folder from the Favorites Bar 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 (3) appears where you can enter the name of the new tag (6). The newly created tag will automatically be saved and published to the Live System.

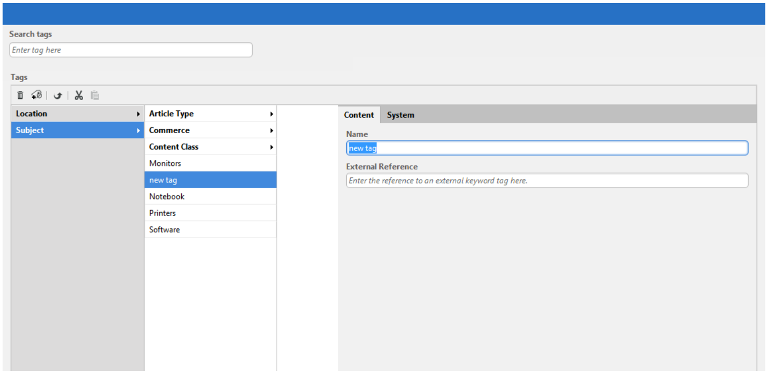


Figure 4.79. Adding a new tag

Moving tags

In order to move a tag you can simply 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.

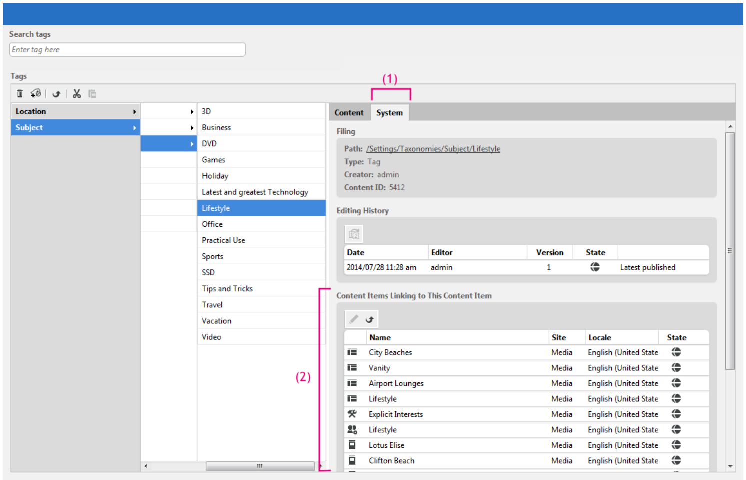


Figure 4.80. Check for linking content items

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 **[Remove selected tag]** icon. 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” [164] describes how you can bookmark content.
- Section 4.7.2, “Publishing Content” [166] describes how content can be published / withdrawn to / from the live system.
- Section 4.7.3, “Translating Content” [177] describes how content can be translated between sites of different languages.
- Section 4.7.4, “Working With Projects” [188] describes how you use projects to group and share your content.
- Section 4.7.5, “Getting Analytics Feedback” [199] describes how you can get feedback on the performance of an article.

4.7.1 Bookmarking Content

CoreMedia Blueprint feature

You can bookmark content items in the Preview and in the Library. Simply click the Bookmark icon in the Preview Toolbar or in the Library or use the context menu in the list view of the Library.

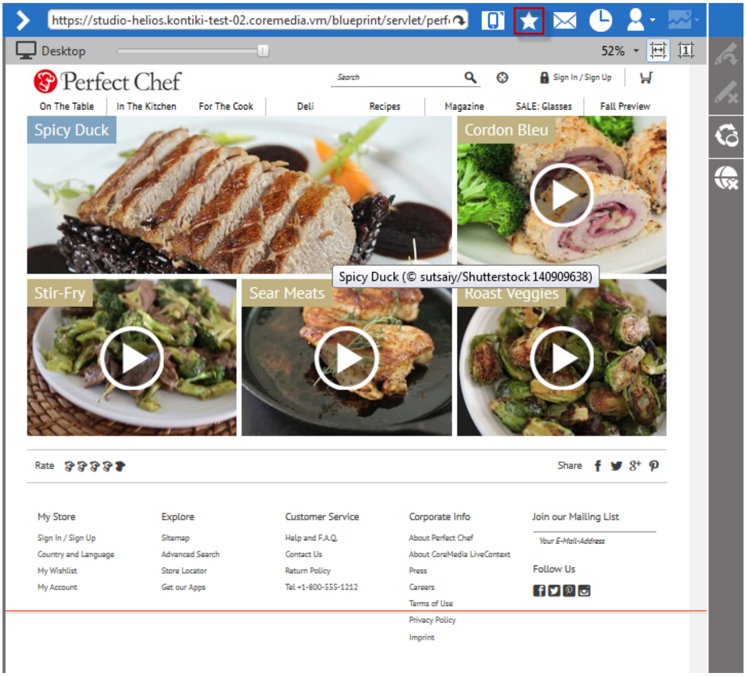


Figure 4.81. Bookmark in the Preview

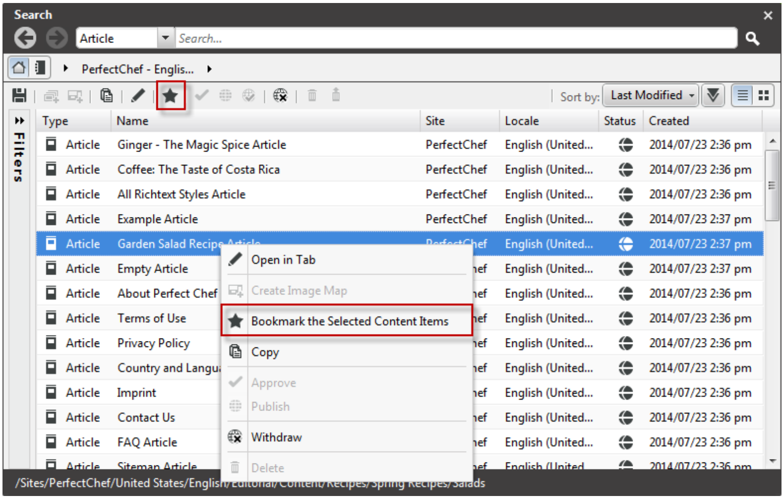


Figure 4.82. Bookmark in the Library

You can access your bookmarks from the *Bookmark* folder of the Favorites 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 4.83, "Current state of the content item" [166]). 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.

Table 4.26. Publication State icons

Icon	Name
	Approved
	Published

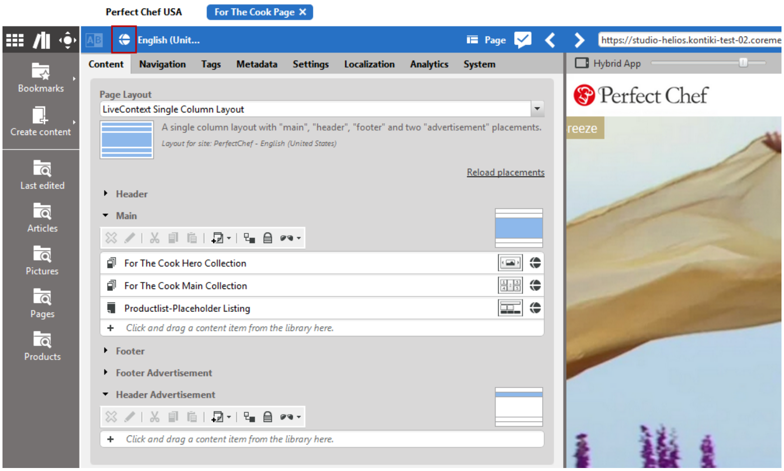


Figure 4.83. Current state of the content item

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.

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” [46]. In addition to the standard ways of starting a workflow, the *Action Toolbar* offers a button to start a publication workflow with the content items from the My Edited Contents list.
2. From the *Workflow Type* dropdown box (1) select the workflow type you want to start.

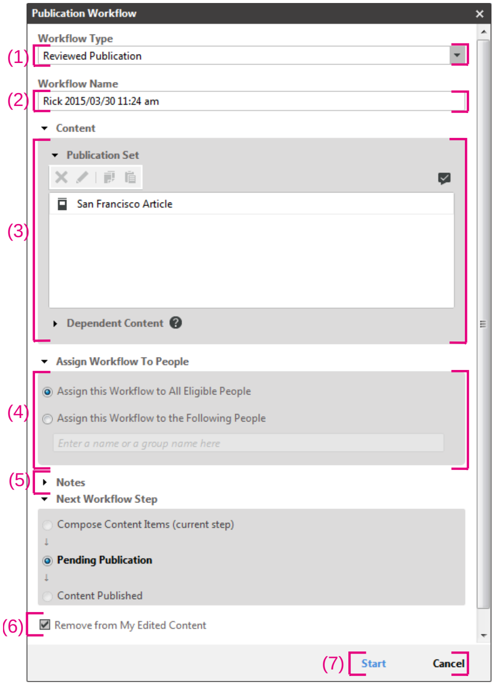


Figure 4.84. Start Publication Workflow Window

3. You might change the workflow name (2) and add, remove or edit content items from the publication set (3).

   The *Extended Publication Set* field is automatically filled with additional dependent content items which also must be published in order to avoid dead links. For example, images that are linked from articles in the project.

4. Either assign the workflow to all users with sufficient rights or to specific users (4). 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. You will get recommendations for users and groups. You can expand a selected group in order to remove users from the selection. The assigned users (with appropriate rights) will get a notification.

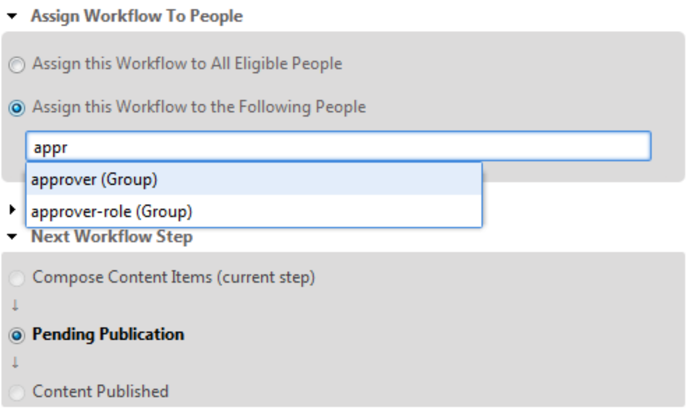


Figure 4.85. Selecting a group or user

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.

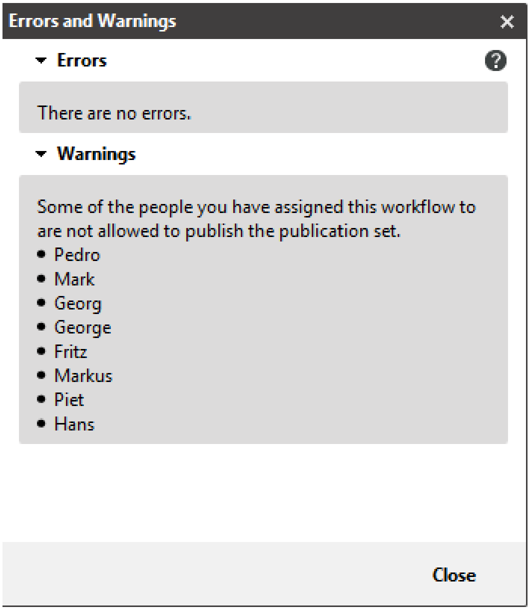


Figure 4.86. Selecting a group or user

5. Add notes in the Notes area (5) 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 (6). 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.

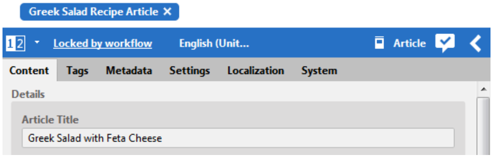


Figure 4.87. Form toolbar showing a locked content item

A locked content item has state *Locked by workflow* in the form toolbar. You can hover over the information icon '?' to see which workflow has locked the content item. You can also click on the underlined link to open the workflow information window containing workflow details. In the workflow information window, you can abort the workflow by clicking on the 'Abort' button. 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.

The workflow appears in your *Pending* workflow list and is offered to other editors who have the rights to accept and finish the workflow.

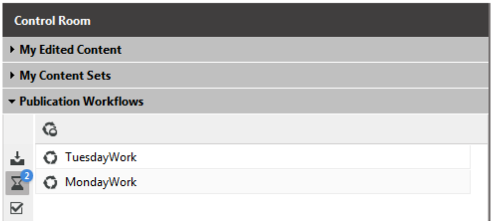


Figure 4.88. Pending publication workflow in the Control Room

a. Another editor has to open the workflow in the Inbox and has to click the **[Accept Task]** button in order to accept the task. If the editor has administration rights, the editor can also click the **[Abort]** button to abort the workflow.

   The workflow disappears from all other inboxes.

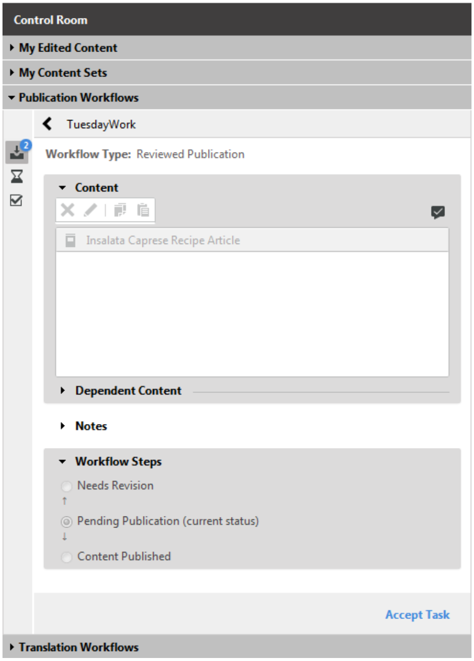


Figure 4.89. Offered Reviewed Publication Workflow in the Control Room

b. The editor can now add, remove and edit content items in the publication set of the newly accepted workflow if required.

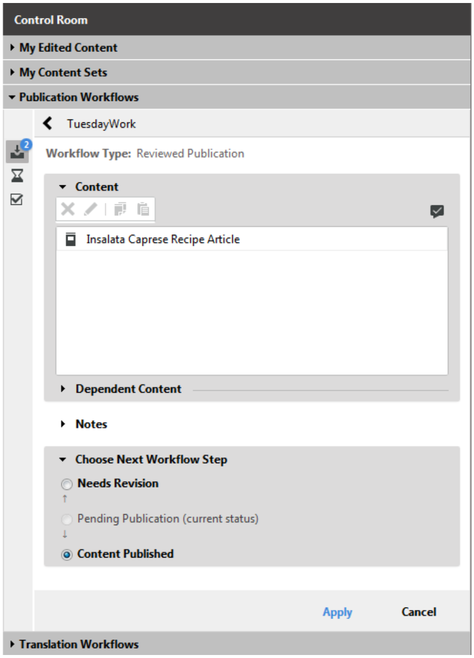


Figure 4.90. Accepted Reviewed Publication Workflow in the Control Room

c. The editor has several options to proceed with the workflow:

Table 4.27. Options to finish a workflow

Option	Description
Hit the **[Apply]** button	All content in the workflow will be published. If the publication was successful, a notification is displayed, saying Workflow finished. You can now see the finished workflow in the Finished view.
Hit the **[Cancel]** button	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 **[Abort]** button	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.
Choose the *Needs Revision* workflow step in the *Choose Next Workflow Step* panel and click **[Apply]**	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

Option	Description
	the creator of the workflow, and you can make changes and start the publication workflow again.

d. 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 thecomposer-role.

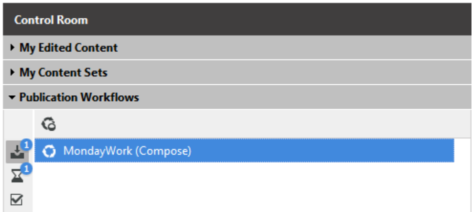


Figure 4.91. Compose Task of Reviewed Publication Workflow in the Control Room

e. An editor can open the workflow needing revision in his Inbox and sees immediately to which of his coworkers the workflow was assigned to.

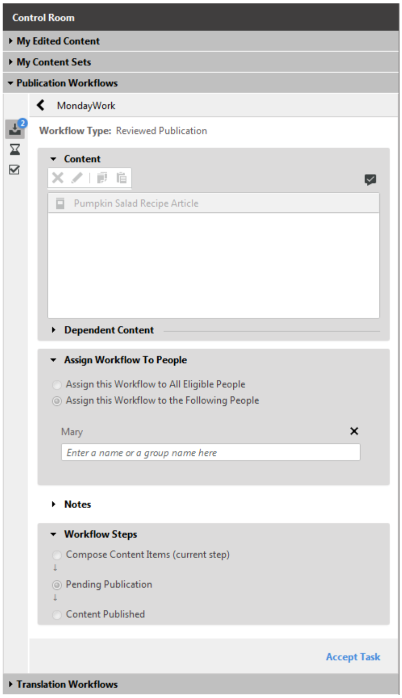


Figure 4.92. Offered Compose Task of Reviewed Publication Workflow in the Control Room

f. After the editor accepts the task, he can work on included content, modify the assignee list and comment the workflow.

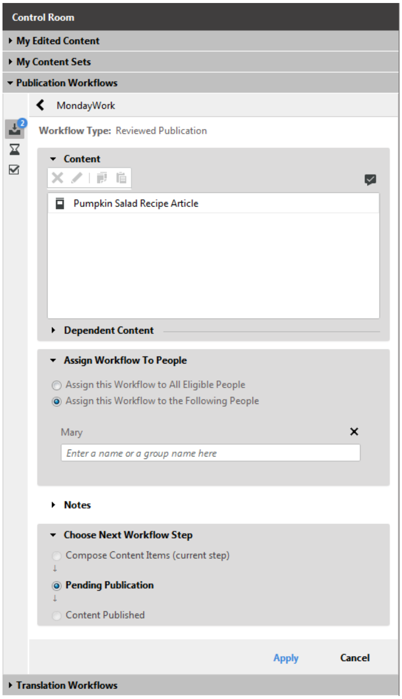


Figure 4.93. Accepted Compose Task of Reviewed Publication Workflow in the Control Room

Publication without Workflow

For administrative users only.

Administrative users have the additional possibility to approve and publish documents 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:

Table 4.28. Icons for Publication Actions without Workflow

Icon	Name
	Approve
	Publish
	Approve and Publish

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.

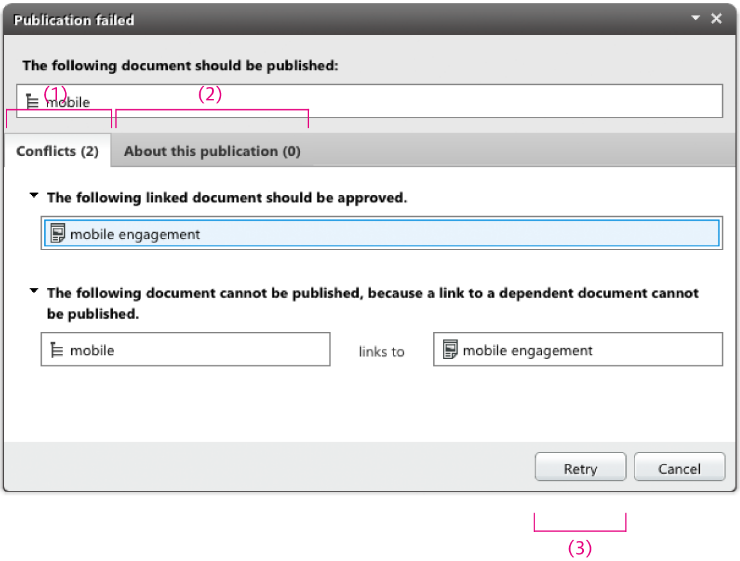


Figure 4.94. Publication window with problems

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]** . You can click with the mouse to open these content items in the Workspace and resolve the errors there. In the screenshot shown, you would need to first approve the "mobile engagement" 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.

Withdrawing Content

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.

Table 4.29. Icon for Withdrawal

Icon	Name
	Withdraw

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 4.95, "Dialog when content has incoming links" [177]. In order to fix it, you can either remove the links or also withdraw the other content items.

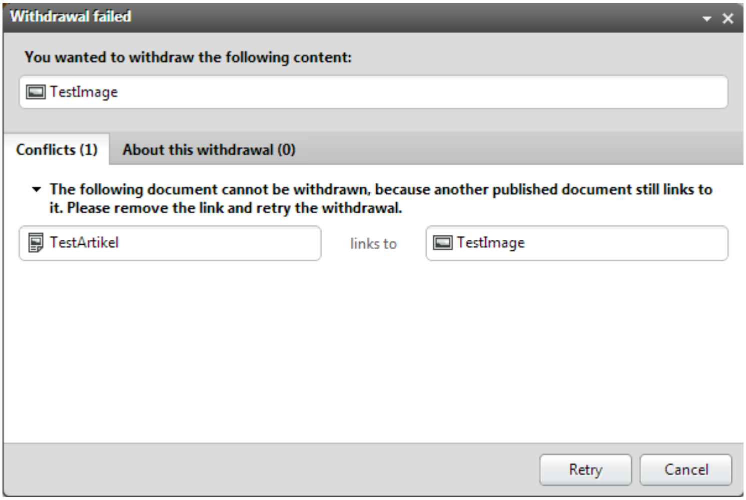


Figure 4.95. Dialog when content has incoming links

4.7.3 Translating Content

CoreMedia Digital Experience Platform 8 lets you manage sites in different languages (see Section 2.10, "Multi-Site and Multi-Language" [48] 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.

Icon	Name
	Open sites window
	Derive site
	Translation to derived sites
	Translation to preferred site
	Download XLIFF
	Compare content items

Table 4.30. Icons for Translation

Preparing Translation: Deriving a 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 Favorites Toolbar open the **Apps** menu and select **Sites**. The sites window opens.

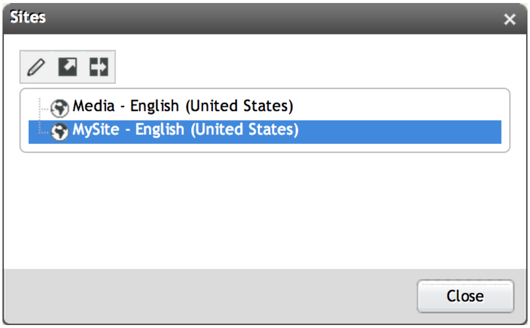


Figure 4.96. Sites Window

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.

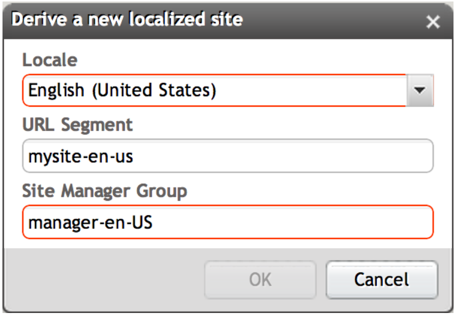


Figure 4.97. Derive a site dialog

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.

   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 the site manager group has not been created yet, the corresponding field will be marked red. Enter the name of an existing user group or create one for the calculated name using the *Site Manager*. See also Section 3.16, "User Administration" in *CoreMedia 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. 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. Use the *Site Manager* to further adjust rights rules if desired.

You see the derived site as a subsite of the master site.

Figure 4.98. Derived Site in Sites Window

Preparing Translation: Find Documents That Need Translation

To support you in finding documents 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*

  documents that only exist in the master and not in the local site
- *Master Updated*

  documents 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*

  documents 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*

  documents that are already being translated to the local site in some version
- *Up to Date*

  documents whose current versions 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 documents in this state are visualized as a bar chart.

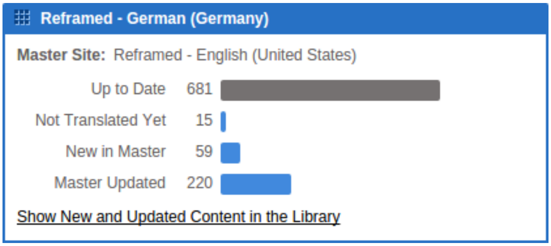


Figure 4.99. Translation State Dashboard Widget

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 documents in the master site for the selected states, so that you can directly start a translation from here.

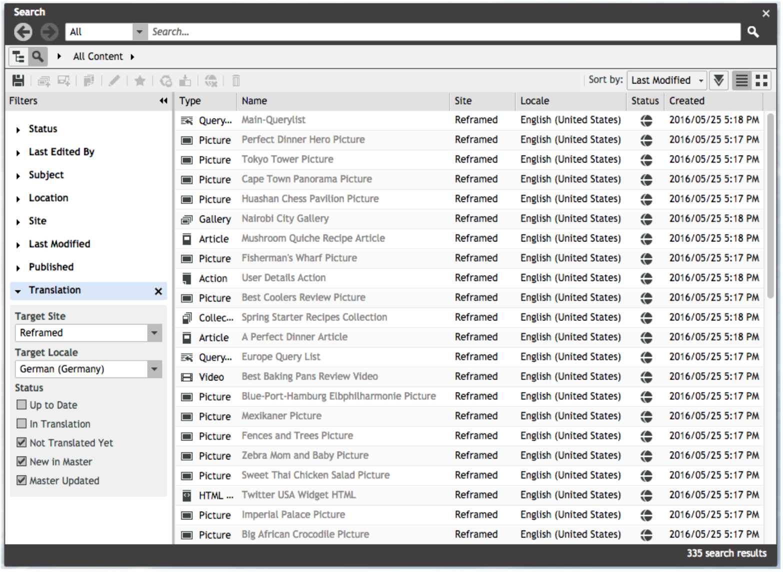


Figure 4.100. Translation State Library Filter

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.

> In order to start a translation workflow you have to be a member of the group translation-manager-role. For more information have a look at Section 3.16, “User Administration” in *CoreMedia 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” [186] and Section “Translation to Preferred Site” [187]) the actions you may perform while translating contents are always the same. Once the translation workflow detail panel opens (Figure 4.101, “Translation workflow detail panel” [183]), you have several options:

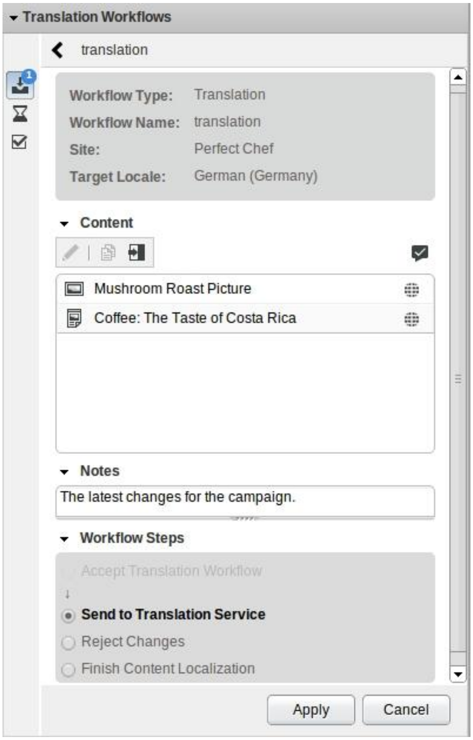


Figure 4.101. Translation workflow detail panel

- You decide that the content needs no translation (see section "Reject Changes" [183])
- You want to translate the content manually in *Studio* (see section "Manually translate the content" [184])
- You want to translate the content with a translation memory system using XLIFF (see section "Translating the Content with XLIFF" [184])

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 *Reject Changes* checkbox and click **[Apply]**

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 "Master Side-by-Side View" [185]). 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 *Finish Content Localization* and click **[Apply]** .

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 DXP 8* you can export and import content as XLIFF files.

1. Export the content as an XLIFF file by clicking the button *Download an XLIFF file* in the *Content* list of the translation workflow detail panel.

   The file will be stored in the download folder of your system.
2. Now, send the XLIFF file to your translation agency or translate it with your in-house system.
3. Depending on your review process you might now either choose to wait and keep the translation workflow assigned to yourself or you might consider to choose *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.
4. When you have finished the translation, import the XLIFF file again as described in section "Importing an XLIFF file" [184].
5. 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 *Create Content* menu (see Section "Uploading Files" [91]) 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.

Master Side-by-Side View

Similar to the version comparison view (see Section 4.6.2, “Comparing Versions” [107]) *CoreMedia Studio* also provides a master side-by-side view for the translation process. The read-only side of the side-by-side view shows the master content item and highlights the differences between the latest translated version and a version of your choice. If opened directly from the translation workflow detail panel, the 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.

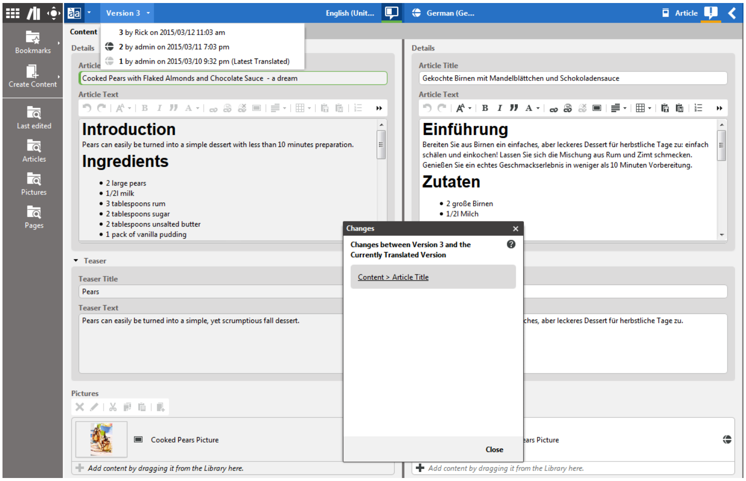


Figure 4.102. Side-by-Side view

Figure 4.102, “Side-by-Side view” [185] 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.

Translation to Derived Sites

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" [46].

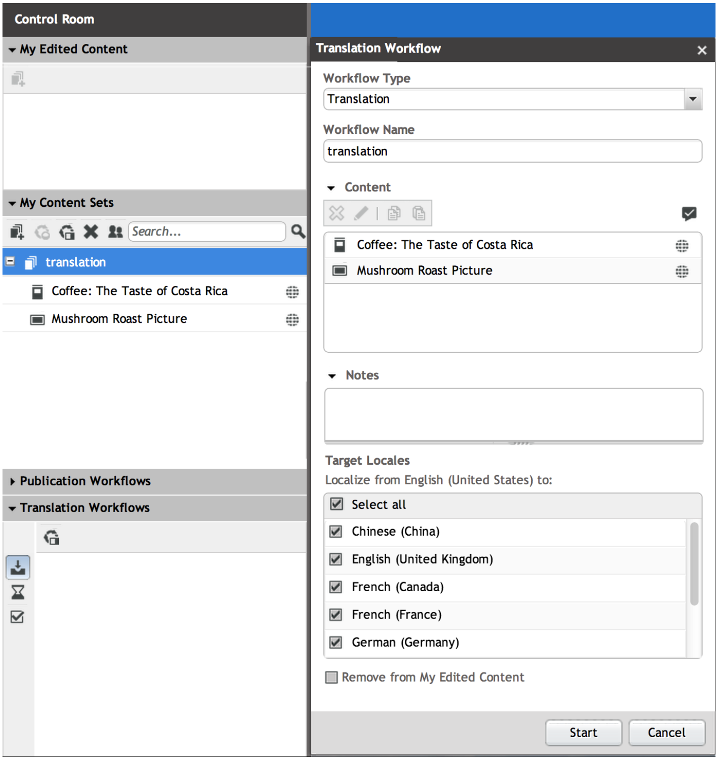


Figure 4.103. Translation Workflow Window

2. Edit the workflow. You can
   - change the name in *Workflow Name*,
   - 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* of the users who are members of the site manager group 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 the site manager group of the target site. Those users will find the new workflow in the *Translation Workflow* panel of their *Control Room*.

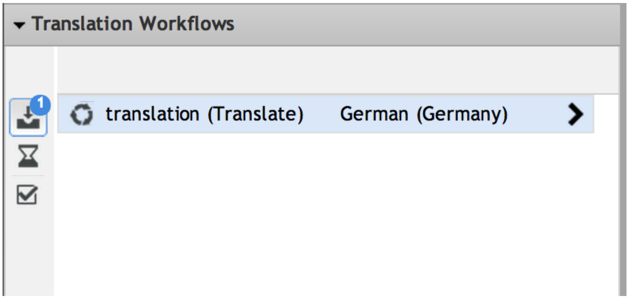


Figure 4.104. Translation workflow panel

1. Double-click the list item in the workflow panel or click the arrow in the selected list item to open the detail view of an offered translation workflow. 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 to preferred site]**
2. In contrast to the process as global site manager (see Section "Translation to Derived Sites" [186]) the workflow will be directly assigned to you and opened in the *Control Room* (see Section 2.4.2, "Control Room" [29]).

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 2.4.2, "Control Room" [29]).

If the dropped content belongs to the master site of your preferred site, the workflow will be directly assigned to you and opened in the *Control Room* as described in Section "Translation to Preferred Site" [187]. Otherwise a translation workflow window will be opened as described in Section "Translation to Derived Sites" [186].

Aborting a Workflow

A translation workflow can only be aborted by the creator of the workflow or by an administrator. Open the workflow in the *Translation Workflows* area of the *Control Room*, open the menu behind the arrow on the right side of the top toolbar and then select **[Abort Workflow]** . 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" [183]).

4.7.4 Working With Projects

With projects you can group content and manage and edit it collaboratively. Projects are created in the Control Room (see Section 2.4.2, "Control Room" [29]) and managed in project tabs.

Table 4.31. Icons for project management

Icon	Name
	Create project
	Leave a project
	Open project in tab for editing
	Start a publication workflow
	Start a translation workflow

Creating and Populating Projects

You create projects in the Control Room in three 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* toolbarin 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.

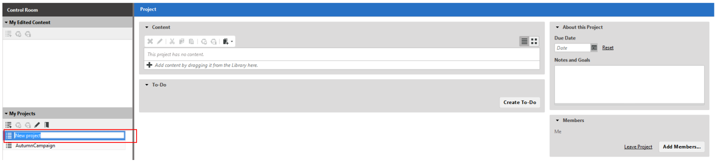


Figure 4.105. Newly created project

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.

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.

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.

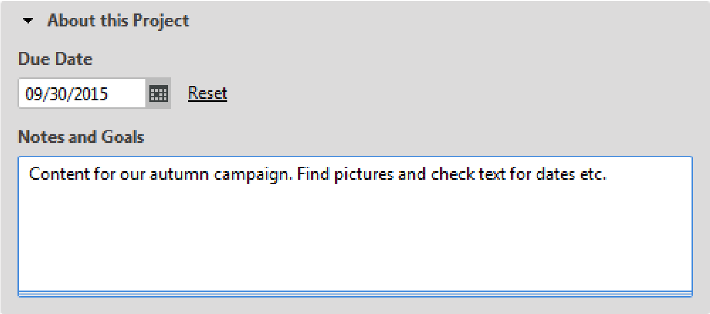


Figure 4.106. About this Project section of a project

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:

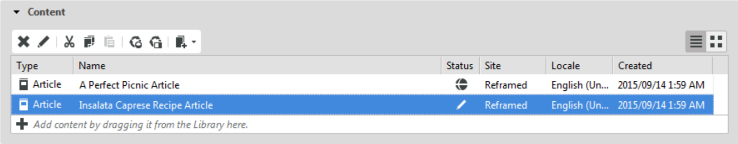


Figure 4.107. Content field of the project tab

- 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" [128].

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...]** .

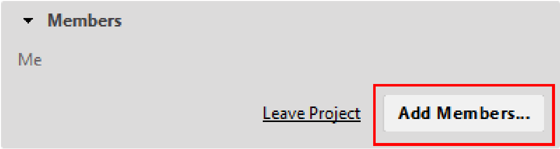


Figure 4.108. The Members section of the project tab

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.

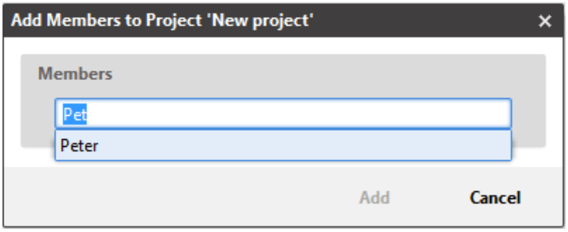


Figure 4.109. Add Members dialog

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.

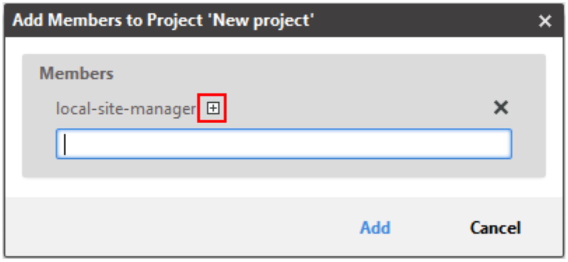


Figure 4.110. Add members window with selected group

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" [41]. 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.

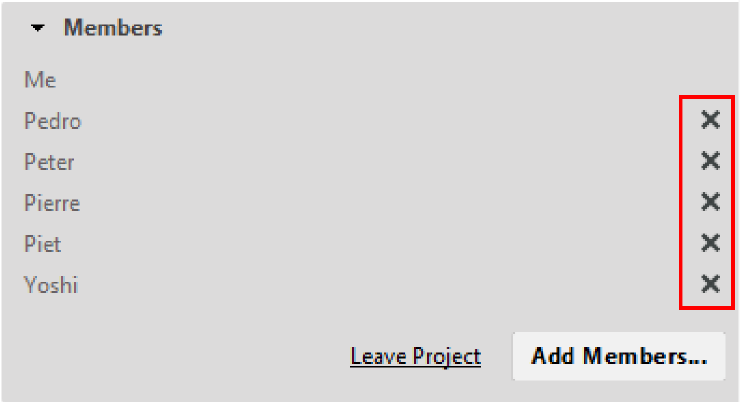


Figure 4.111. Removing members from a project

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.

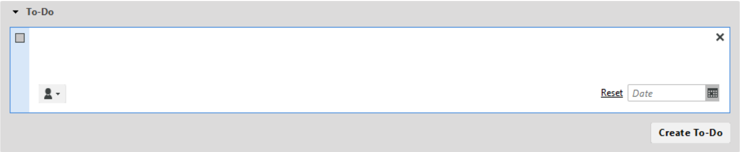


Figure 4.112. New to-do

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.

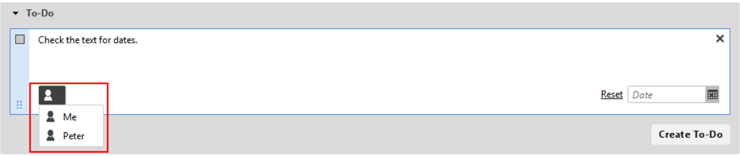


Figure 4.113. Selecting a user

Adding a Due Date

Select the to-do and click the . 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.

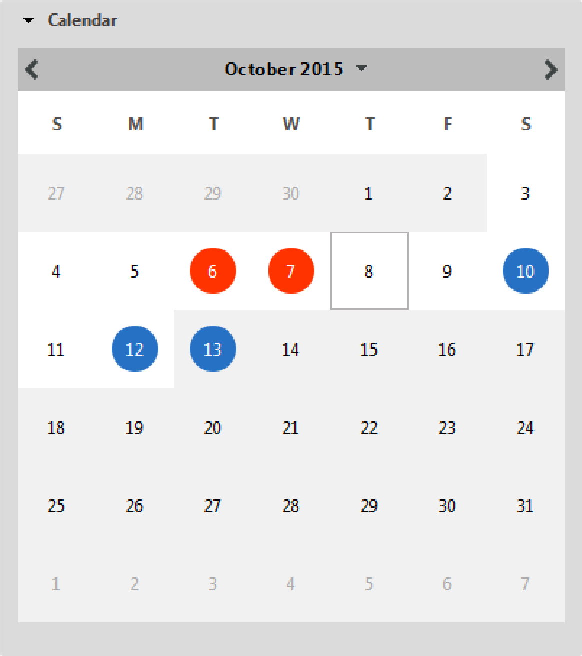


Figure 4.114. Calendar of a project

The current date is highlighted with the light frame, open to-do due dates are marked with the blue circle, done to-dos with a gray circle, overdue to-dos with a red circle and the due date of the whole project is marked by the end of the white section. 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.

Marking To-Do as Completed

Check the checkbox of the to-do to mark the to-do as completed.

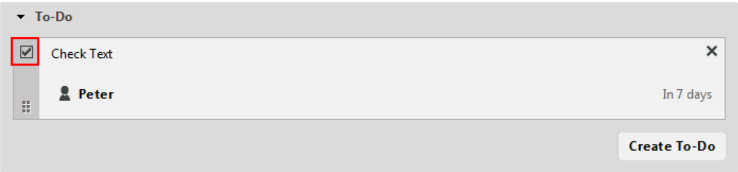


Figure 4.115. Completed to-do

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.

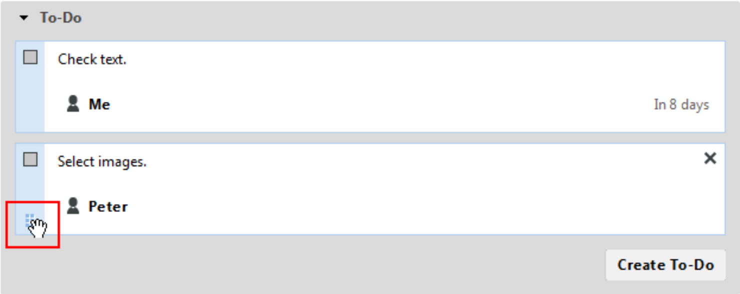


Figure 4.116. Dragging to-dos

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.

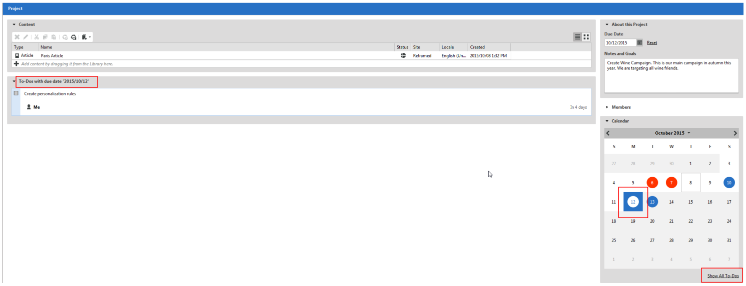


Figure 4.117. Filtered to-dos

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.

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, proceed as follows:

1. Right-click the project and select **(2) Start publication workflow** from the context menu or click the *(1) Start publication workflow* icon in the toolbar. You can also publish a project by drag and drop - drag the project and drop it onto the Publication Workflows panel.

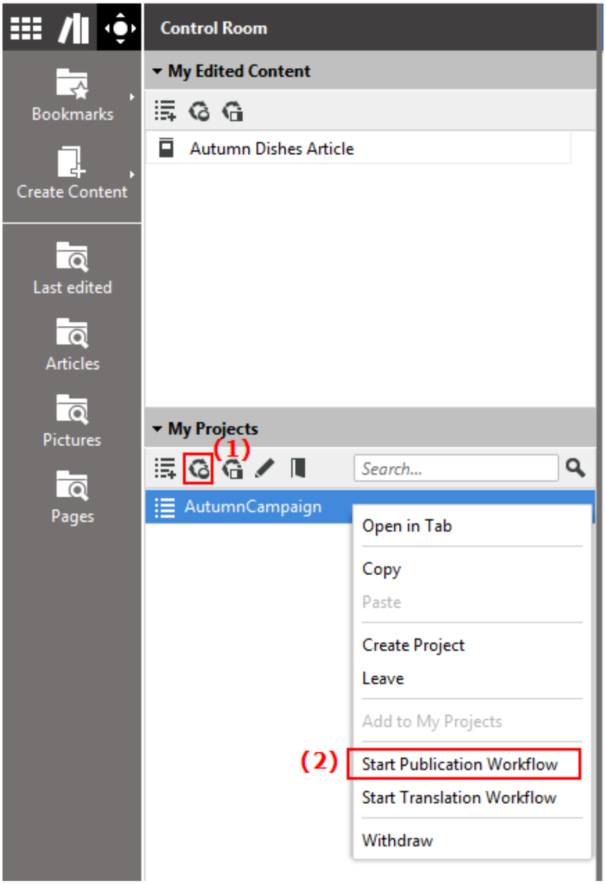


Figure 4.118. Start publication workflow context menu

2. Alternatively, you can select content items in the *Content* link list of the project tab and start a publication workflow for these items.

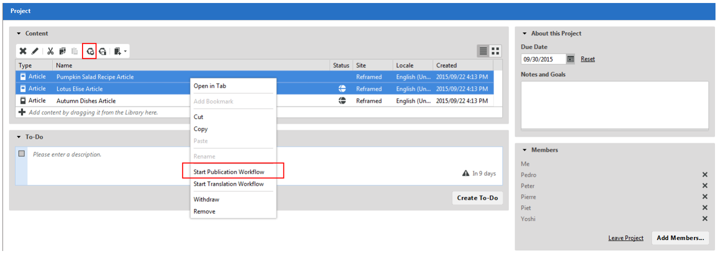


Figure 4.119. Publish selected items

Now, you can proceed as described in Section 4.7.2, “Publishing Content” [166].

Translating a Project

Translating a project means, that all content items that are assigned to the project will be added to a translation workflow.

You can start a translation workflow for a project from the Control Room. Simply right-click the project and select **Start translation workflow** from the context menu, or drag and drop the selected project onto *Translation Workflows* section. Alternatively, you can select content items in the *Content* link list of the project tab and start a publication workflow for these items. Proceed as described in Section 4.7.3, “Translating Content” [177].

Showing Project in Control Room

You can easily open the Control Room with the open project highlighted in the *My Projects*-list. Rightclick the title of the project tab and select **Show in Control Room** from the context menu.

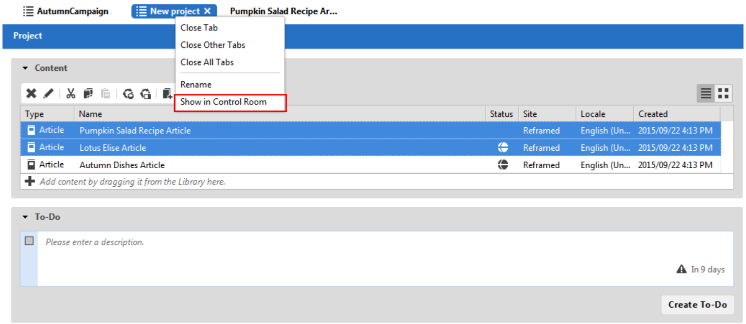


Figure 4.120. Context menu of the project tab

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” [192] and finally remove yourself from the project.

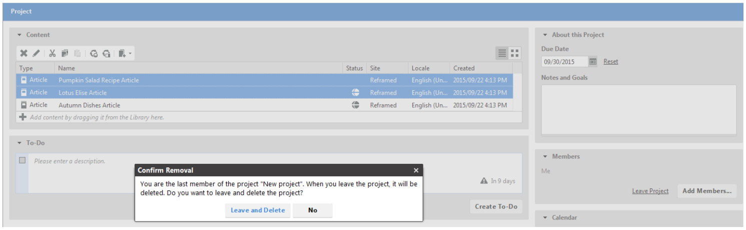


Figure 4.121. Deletion of a project

Confirm the dialog and the project is deleted.

4.7.5 Getting Analytics Feedback

CoreMedia Blueprint feature

To get direct feedback on the performance of an article, a page impression history is displayed in the *System* tab of each article of *CoreMedia Studio*.

The page impression history can be displayed for the last 7 or 30 days.

As the page impressions are retrieved asynchronously from a third-party analytics provider, the timestamp of the last retrieval is displayed. By default, data is retrieved every 24 hours. If no data is available for the selected time span, no chart is displayed.

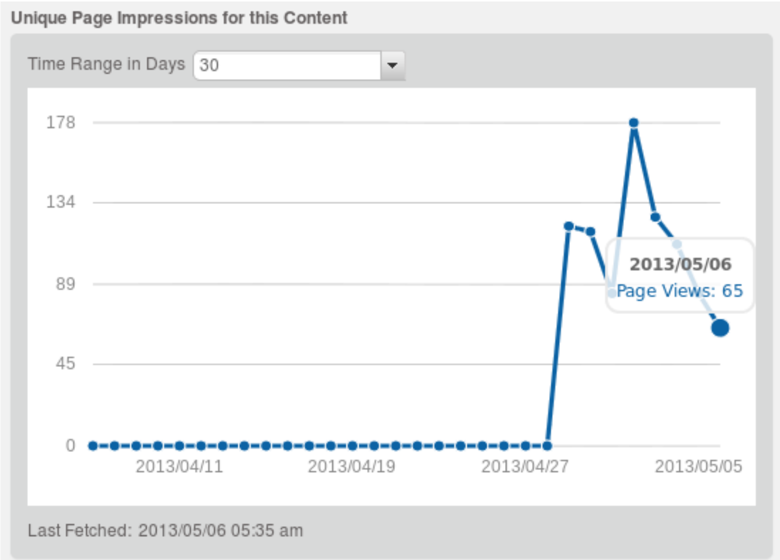


Figure 4.122. Page Impression History for 30 days

The page impression history contains the publication date of the article. When you hover over the history, the corresponding date is marked in the page impression history (see Figure 4.123, “Page Impression History with Publication Events” [200]).

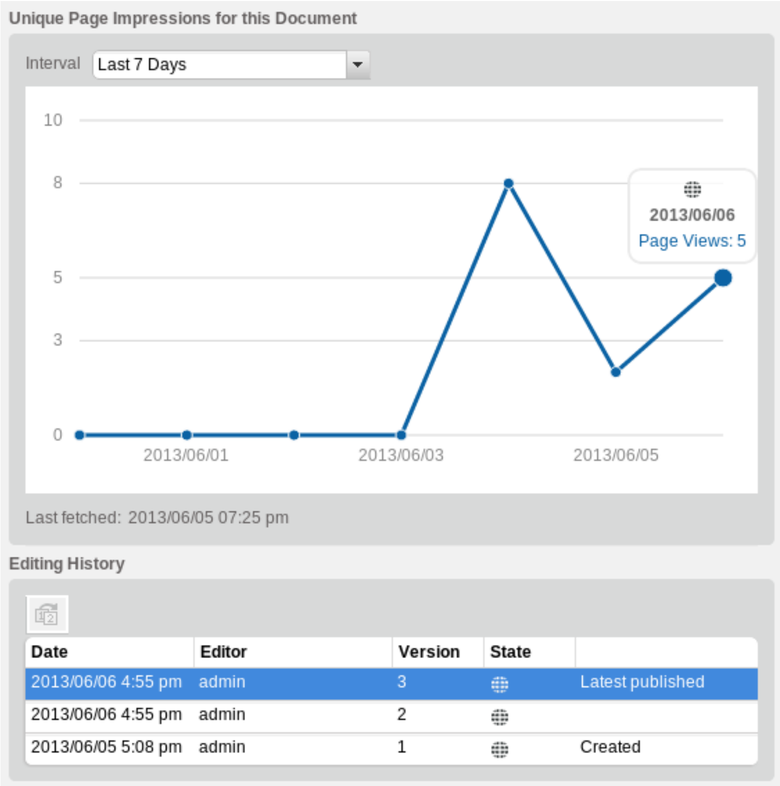


Figure 4.123. Page Impression History with Publication Events

4.7.6 Checking Content in External Preview

CoreMedia Blueprint feature

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.

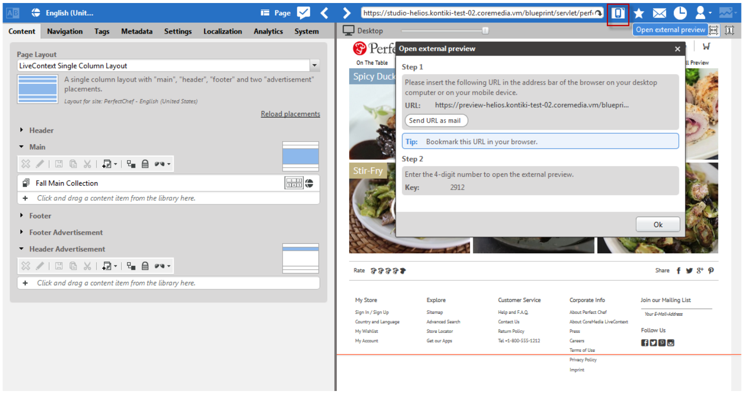


Figure 4.124. Preview dialog

Open external preview

1. Click the **[Open external preview]** icon, a dialog opens up
2. Enter the URL that is shown in the dialog into the address bar of the browser of your external device. A login dialog opens.
3. Enter the PIN that is shown in the dialog into the login window of your external device.

Now, the browser shows the preview of the active content item in the Form.

5. Working with Assets

CoreMedia Advanced Asset Management is a module that requires separate licensing. So, it might be, that *Advanced Asset Management* is not part of your CoreMedia installation.

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 DXP 8* 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” [207] and Section 5.4, “Creating Videos from Assets” [209] .

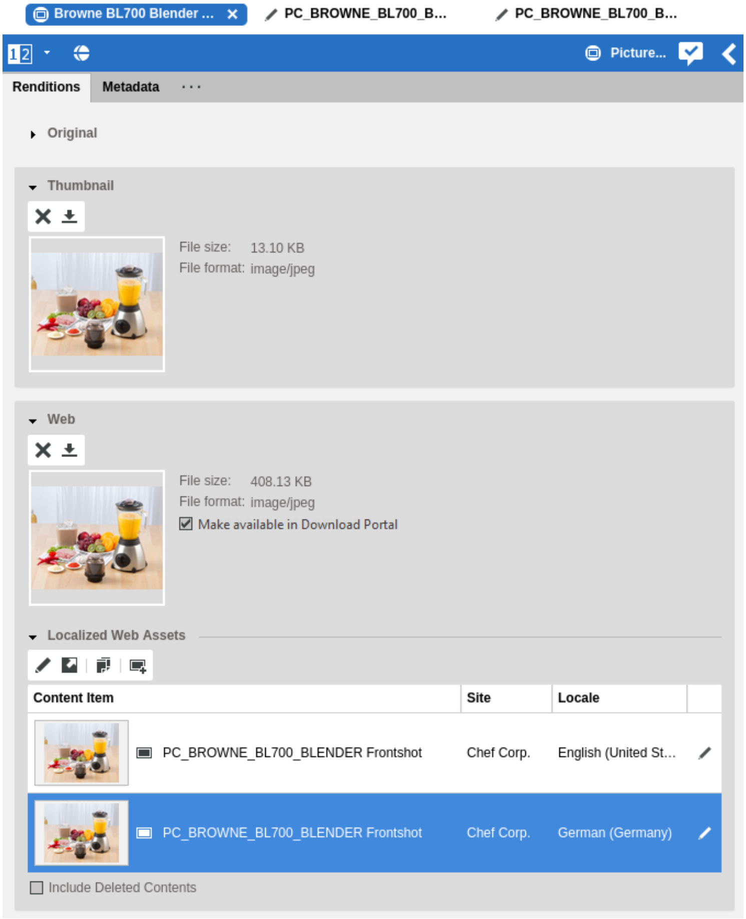


Figure 5.1. Picture Asset content item

Adobe Drive integration

CoreMedia Advanced Asset Management integrates with Adobe Drive. This allows you to access your CoreMedia assets directly from your Adobe application, such as Photoshop.

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.

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 " [204] for an example with Photoshop). You can add more than one product code to an image.

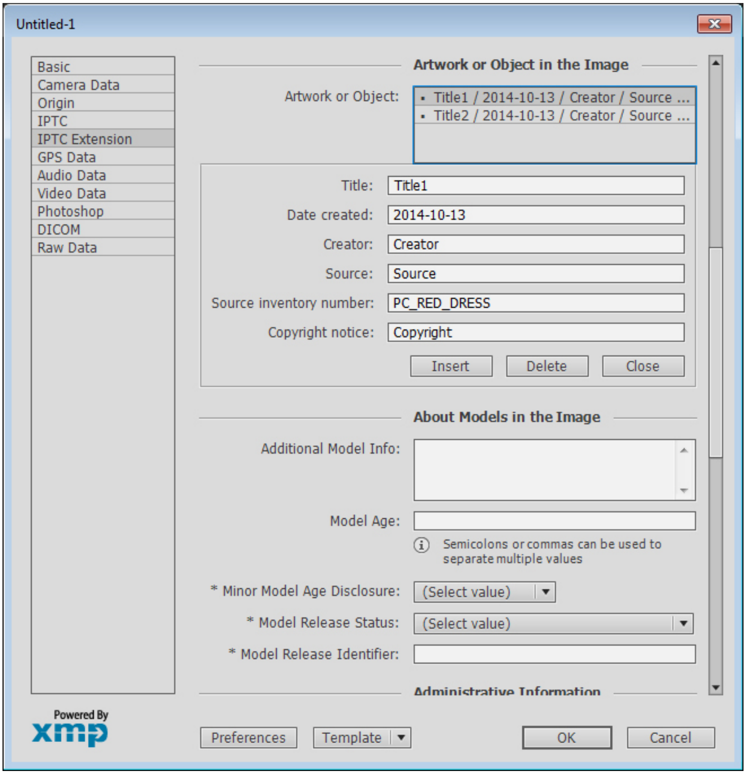


Figure 5.2. IPTC metadata setting in Photoshop

5.2 Creating Assets in Studio

You create assets in a freely configurable folder structure below the `Assets` folder. When you use the Adobe Drive integration, you can also create assets from Adobe applications and the explorer/finder of your operation system. This is described in Section 5.9, "Accessing Assets with Adobe Drive" [217].

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" [204] 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" [211] for details.

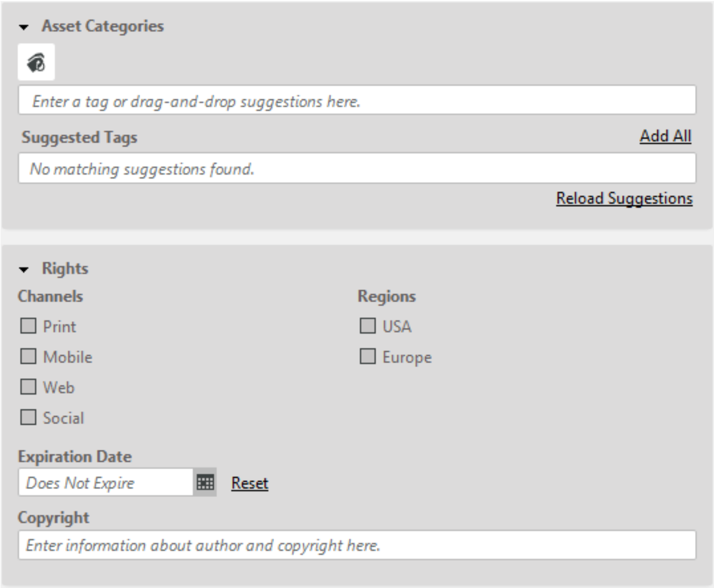


Figure 5.3. Metadata for Assets

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.

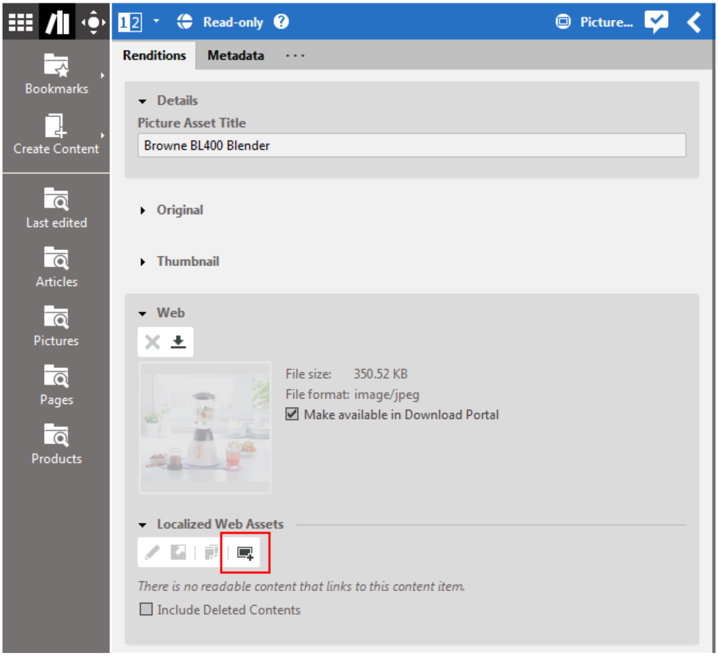


Figure 5.4. Create picture from asset button

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.

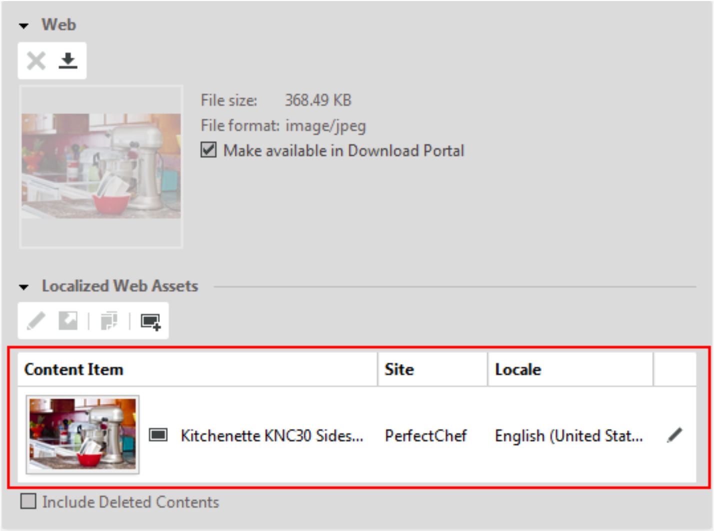


Figure 5.5. Newly created picture shown in Picture Asset

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.

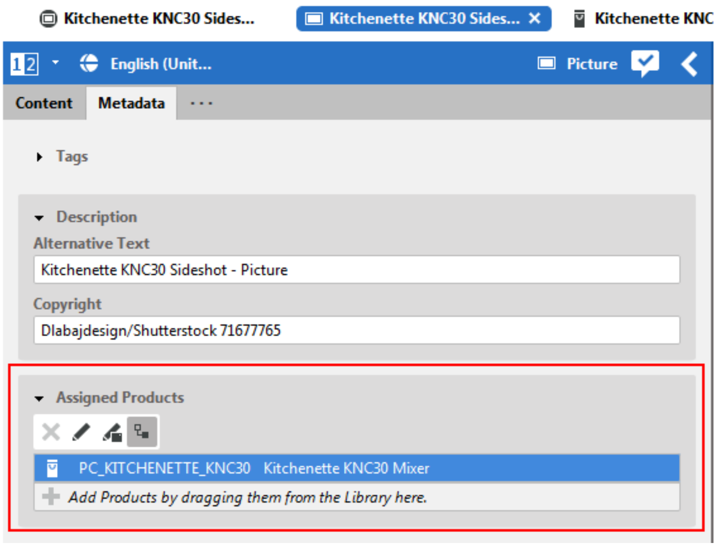


Figure 5.6. Product linked by picture

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.

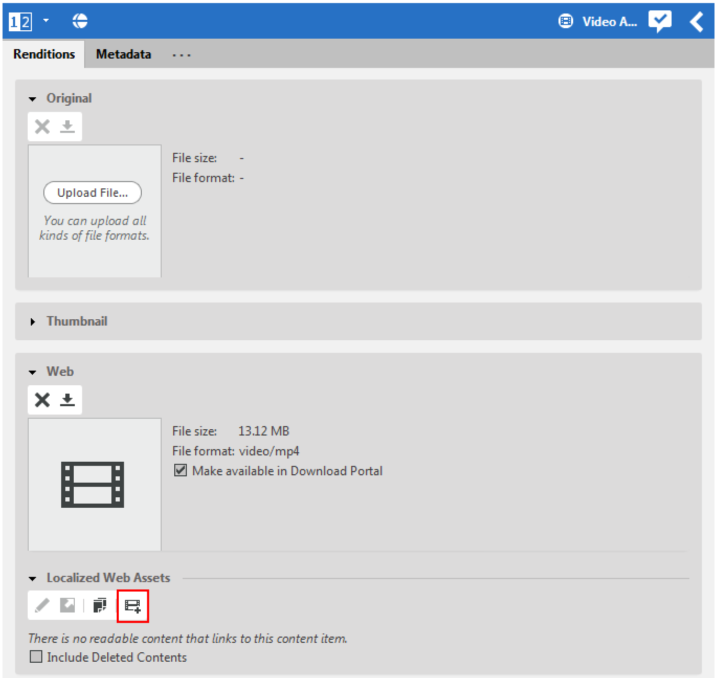


Figure 5.7. Create video from asset button

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.

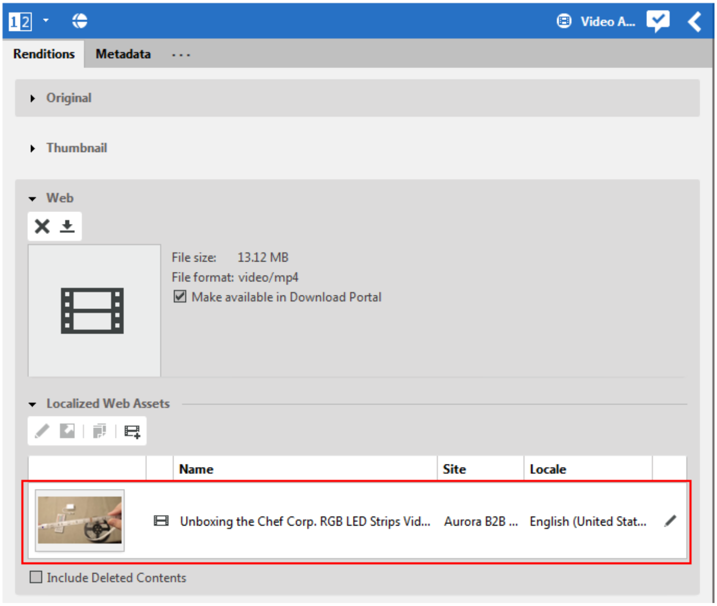


Figure 5.8. Newly created video shown in Video Asset

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 Digital Experience Platform 8 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 DXP 8*.

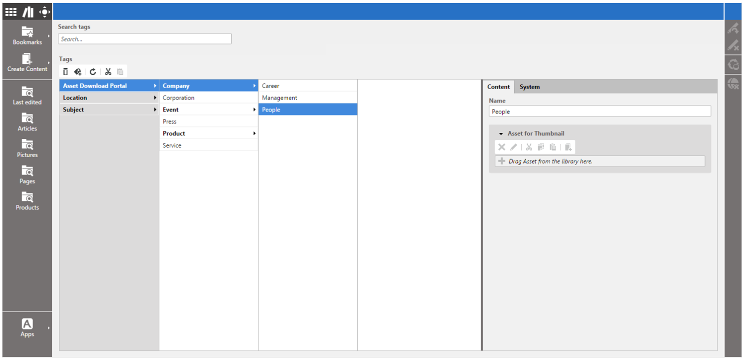


Figure 5.9. Taxonomy for assets

The taxonomy items are located in `All Content/Settings/Taxonomies/Asset Download Portal`. You can work with taxonomies as described in Section 4.6.15, “Metadata Management” [156].

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.

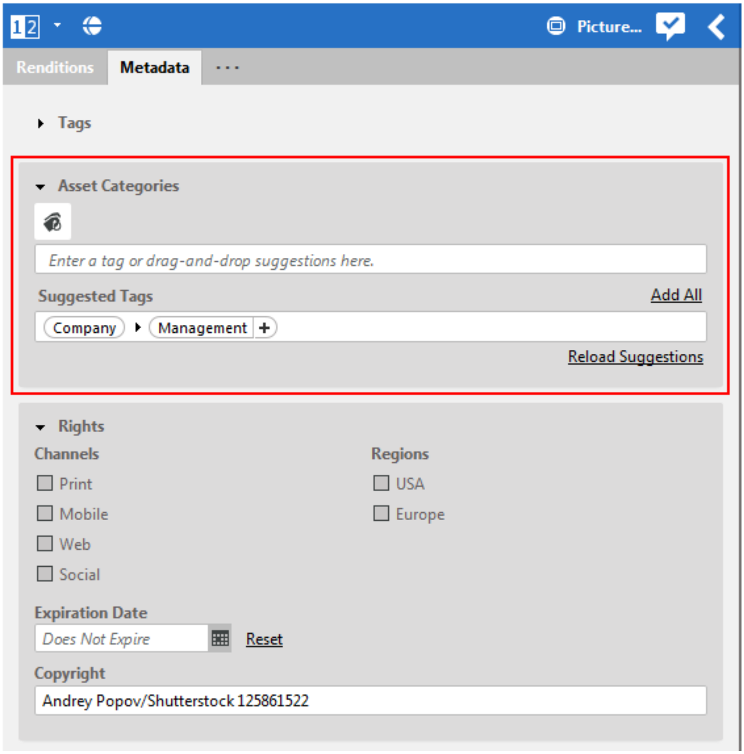


Figure 5.10. Add category to asset

You can use the category in searches and it is used to organize the download portal.

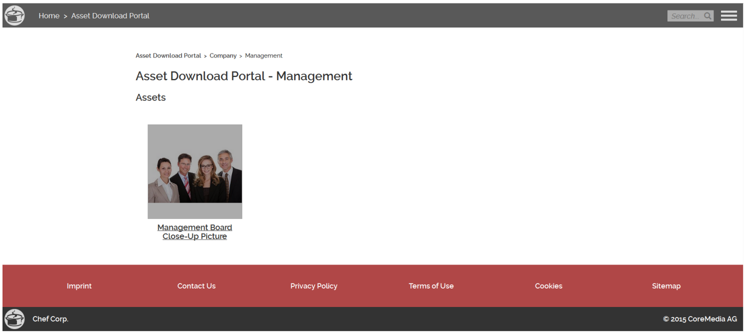


Figure 5.11. Download portal with Asset

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” [74]). However, *Advanced Asset Management* enhances the *Filters* menu (see section “Filtering the results” [79]) 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” [211] .
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.

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.

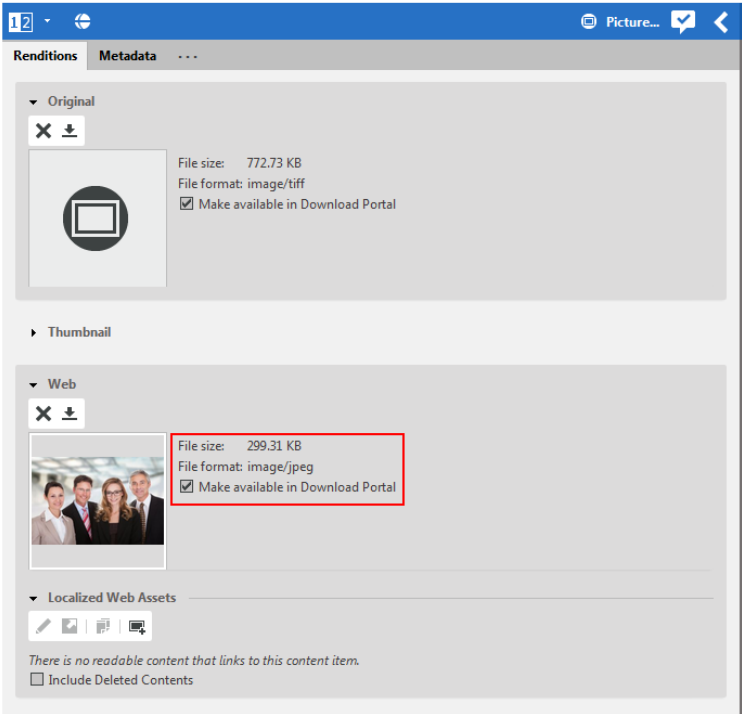


Figure 5.12. Select property for publication

5.8 Configuring the Asset Download Portal

CoreMedia Advanced Asset Management contains a download portal on the website.

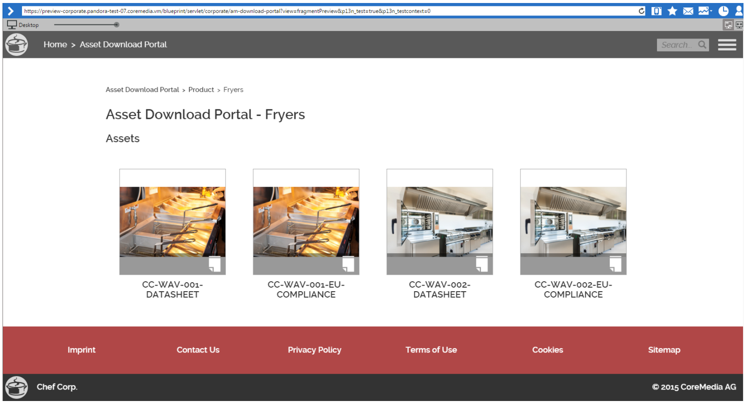


Figure 5.13. Asset download portal

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.

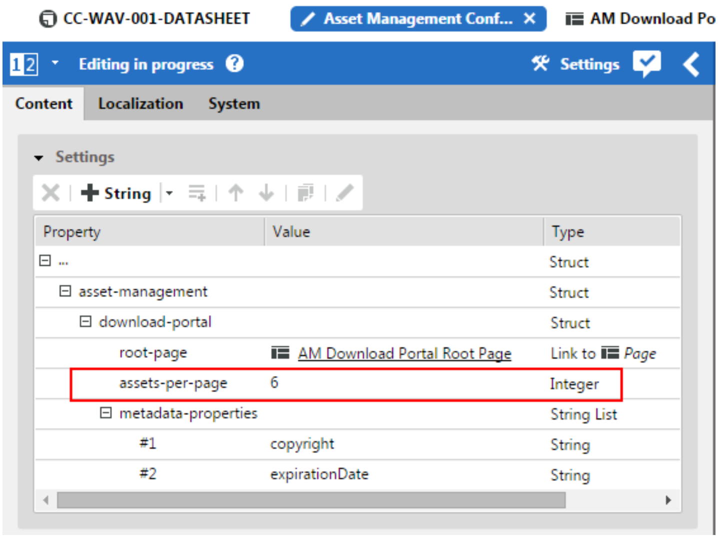


Figure 5.14. Configuration of the download portal

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.

5.9 Accessing Assets with Adobe Drive

CoreMedia Digital Experience Platform 8 contains an Adobe Drive integration that lets you access content from the CoreMedia system.

Naming schema

Advanced Asset Management exports both assets and folders as directories to Adobe Drive. Each exported rendition of an asset (for example, "Web", "Print") is exposed as one file in the asset's directory. The set of available renditions is configured by your system administrator. Folders are exported with their CoreMedia name. By default, the naming scheme for asset directories and files is as follows:

Directories
`Asset Picture <NameOfCoreMediaItem>` or `Asset Document <NameOfCoreMediaItem>` where `<NameOfCoreMediaItem>` is replaced by the name of the asset content item in the CoreMedia system.

Files
`<NameOfCoreMediaItem>_<NameOfRendition>.<FileExtension>` where the placeholders with angle brackets are replaced by the corresponding values.

This default can be changed by your system administrators.

When creating a rendition, use the exact name of the rendition as globally configured. Use an alphanumeric file extension, that is, a file extension consisting of letters and numerals, only. All common file extensions fulfil this requirement.

Example

An asset item from the CoreMedia system with name `ManagementCloseUp` is located in `Assets/Company/About/Management Board` and exports the property *Web*. On your computer, you will find a file `ManagementCloseUp_web.jpg` below the folder `Assets/Company/About/Management Board/Asset Picture ManagementCloseUp`.

5.9.1 Connecting Adobe Drive with the CoreMedia Server

Prerequisites: Adobe Drive with at least version 5.0.3 installed on your computer. Note, that you can install Adobe Drive only, when you already have an Adobe client installed, such as Photoshop or Bridge.

Before you can access CoreMedia content in Adobe applications, you have to prepare Adobe Drive and connect with the CoreMedia system.

1. You have got the server URL of the CoreMedia Adobe Drive backend from your administrator. Enter the URL into your browser and download the `com.coremedia.adobe.adobe-drive-client.bundle.jar` file from the web page.

2. Stop Adobe Bridge or any other Adobe client application, Adobe Drive and the background process `AD4ServiceManager` (use the task manager to stop the background process.
3. Put the file into the Adobe Drive plugin directory:
   - Windows: `C:\Program Files\Common Files\Adobe\AD4ServiceManager\plugins`
   - Mac: `/Library/Application Support/Adobe/AD4ServiceManager/plugins/`
4. Restart Adobe Drive.
5. In Adobe Drive, the CoreMedia DAM appears in the *Connector* field. Add a new connection to the CoreMedia DAM. Enter the URL from step 1 and the Studio user name and password that should be used for this connection.

   Keep in mind, that the user needs appropriate rights on assets and the `Assets` folder.

Now you are done. When you start Adobe Bridge, for instance, you will see the CoreMedia connection below Adobe Drive.

Updating the CoreMedia client file

For an update of the CoreMedia Adobe client JAR follow the steps of the initial installation, described above.

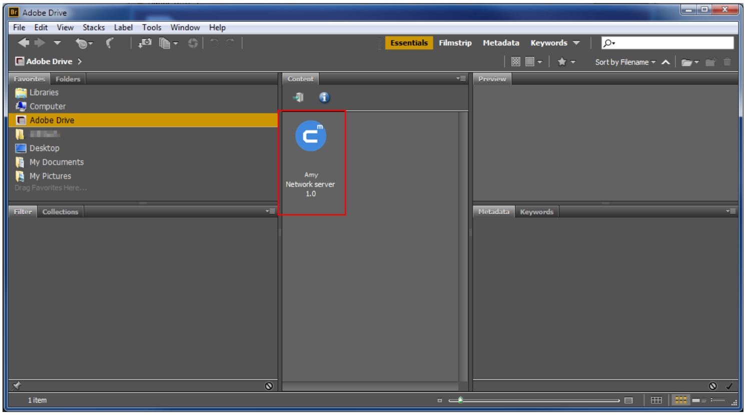


Figure 5.15. CoreMedia content in Adobe Bridge

5.9.2 Editing Content

When you have connected Adobe Drive with the CoreMedia system, you can open the renditions in your Adobe products, such as Photoshop, and start editing. As soon as you start editing, the corresponding content will be checked out in *Studio*, so no other user can edit any of the properties of this asset at the same time.

Example: The asset picture named `Headquarter` has three rendition properties, `Web`, `Print`, `Mobile` with images of type JPEG. You will find the images as files with filename `Headquarter_web.jpg`, `Headquarter_print.jpg` and `Headquarter_mobile.jpg`, respectively on your local machine. As soon as you change one of the files, no other editor can change any of the three files.

Check-in changed rendition files

When you have finished your changes, use the check-in functionality of the Adobe product (for example, **File** → **Check In...** in Photoshop) to transfer the changes to the CoreMedia system. A new version of the asset will be generated in the CoreMedia system but only when none of the renditions is edited anymore.

There are some limitations, with regard to file changes, due to the model that is used to map CoreMedia assets to the file system.

Creating new assets

You can create a new asset item in the CoreMedia system by creating a folder in your file system when you follow the naming scheme, described above.

Example: Creating a folder named `Asset Picture NewBlender` in Adobe Bridge will create a content item named `NewBlender` in *CoreMedia Studio*. Then, creating an image file `NewBlender_web.jpg` in this folder and check it in, will add the image to the property *Web* of the `NewBlender` CoreMedia content.

Renaming asset folders

A CoreMedia asset content item is mapped to a folder in the filesystem, following a specific naming scheme. Therefore, you can only rename an asset folder, when you follow this scheme.

Example: The folder name follows the default scheme, described in this section. For example, the name is `Asset Picture Blender`. Then you can change it to `Asset Picture Big Blender` but not to `Big Asset Picture Blender`. Because in the first case, you change the name of the asset while in the second case you try to change part of the name which is set by the naming scheme.

Renaming files

A CoreMedia asset content property is mapped to a file in the filesystem, following a specific naming scheme. Because this name is calculated from given values you cannot change the file name. Yet, when you change the name of an asset folder, the names of the files will also change.

Moving files

A CoreMedia asset content property is mapped to a file in the filesystem, following a specific naming scheme. Therefore, you cannot move a file into another folder, because the name would be wrong.

6. Working with Product Catalogs

e-Commerce 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. *CoreMedia DXP 8* 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” [222].
- The connection with an IBM WebSphere Commerce system and support in Studio with content items of type `Product Teaser`, `Augmented Page`, `Augmented Category` and `e-Marketing Spot`, see Section 6.2, “Working with e-Commerce Content” [227].

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" [224].

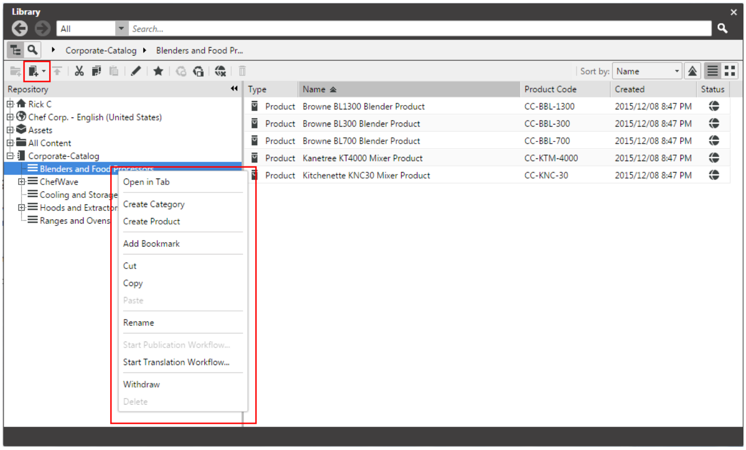


Figure 6.1. Editing the CoreMedia product catalog

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 **Create 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 **Create Product** from the context menu. Enter a name and click **[Create]** .

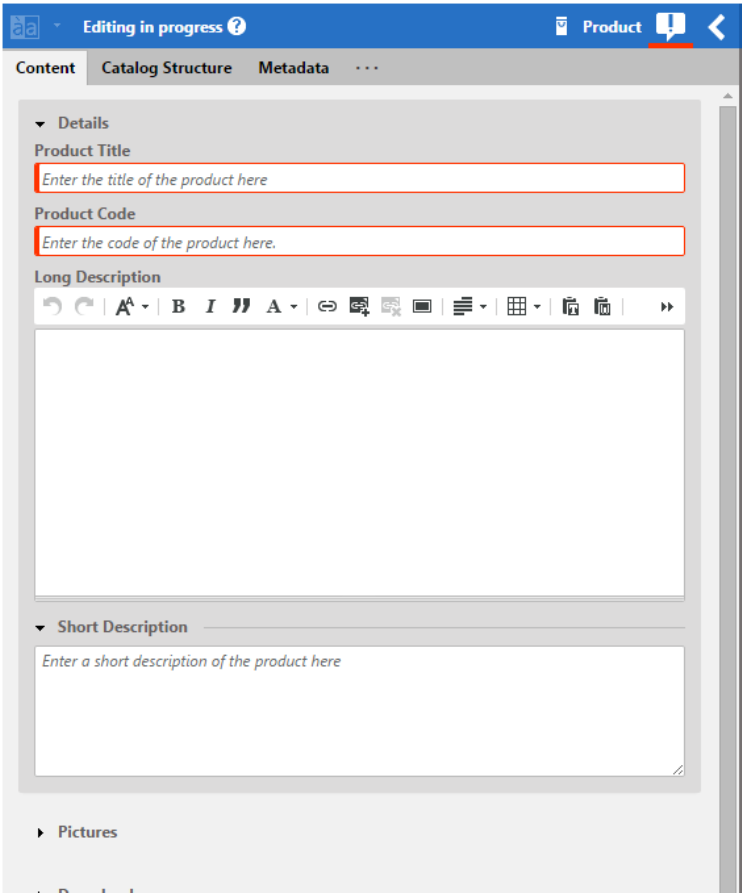


Figure 6.2. Newly created product

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`. 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 Content Items" [94]. 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

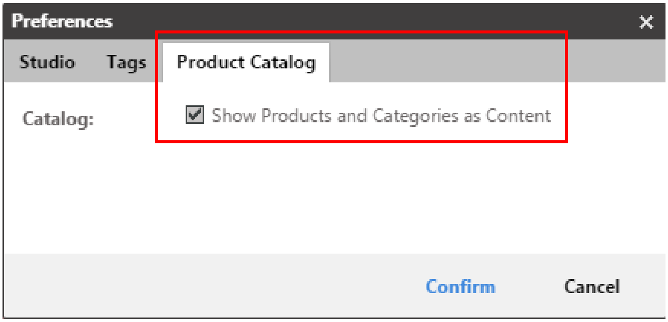


Figure 6.4. The CoreMedia product catalog preference tab

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.

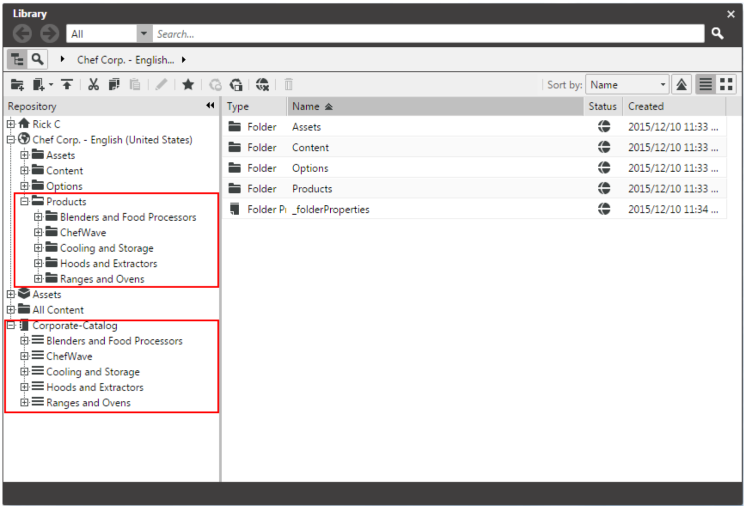


Figure 6.5. CoreMedia product catalog as content

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.

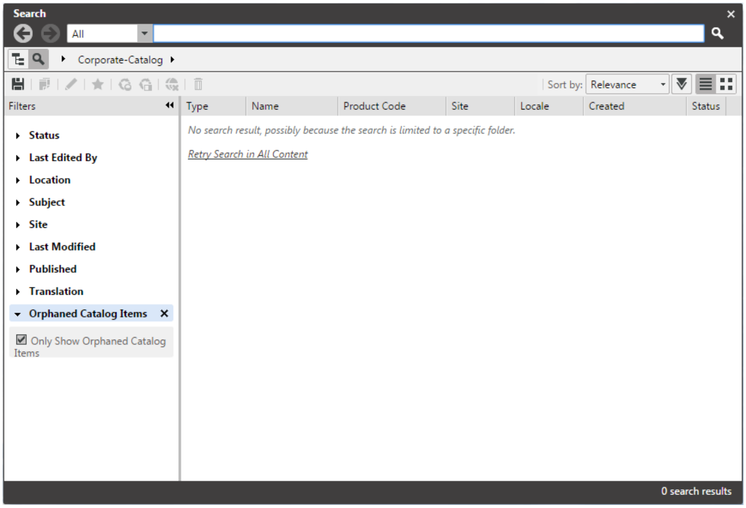


Figure 6.6. Catalog Lost And Found

6.2 Working with e-Commerce Content

CoreMedia Digital Experience Platform 8 feature

CoreMedia Digital Experience Platform 8 integrates with *IBM WebSphere Commerce*. Therefore, the Library was extended in order to offer direct access to the e-Commerce content.

Content-led scenario

You can use the placeholder content types `Product Teaser`, `e-Marketing Spot`, `Augmented Category` and `Augmented Page` to add e-Commerce content to the sites managed in *CoreMedia Digital Experience Platform 8*. These content items hold a link to the corresponding e-Commerce content. Changes in the e-Commerce system are immediately visible in the CMS.

In addition, you can use IBM WebSphere Commerce segments in personalized content as described in Chapter 7, *Working with Personalized Content* [262].

Commerce-led scenario

In the opposite direction, you can add content from the CMS system into sites created by the IBM WebSphere Commerce system.

The following sections describe how you access e-Commerce content in *Studio* and how you work with e-Commerce content types in order to include content from your *IBM WebSphere Commerce* system into your site (Content-led scenario) or the opposite direction (Commerce-led scenario or fragment approach).

Table 6.1. Icons for working with e-Commerce

Icon	Name
	Open a product in the WebSphere Commerce management view
	Create a product teaser for the selected e-Commerce product
	Create an e-Marketing Spot for the selected e-Commerce e-Marketing Spot
	Search product variants (SKU) for the selected product

6.2.1 Accessing Commerce Content in Studio

This section describes how you access content from the IBM WebSphere Commerce system in *CoreMedia Studio*.

Catalog View

When you have selected a site with a connected e-Commerce system, you will see the e-Commerce content in the tree of the Library. You can use the standard Library functionality (see Section 2.4.6, “Library” [34]) to browse through the e-Commerce content, search for items or add products to a `Product Teaser` content type, for instance. Only the filters are not applicable.

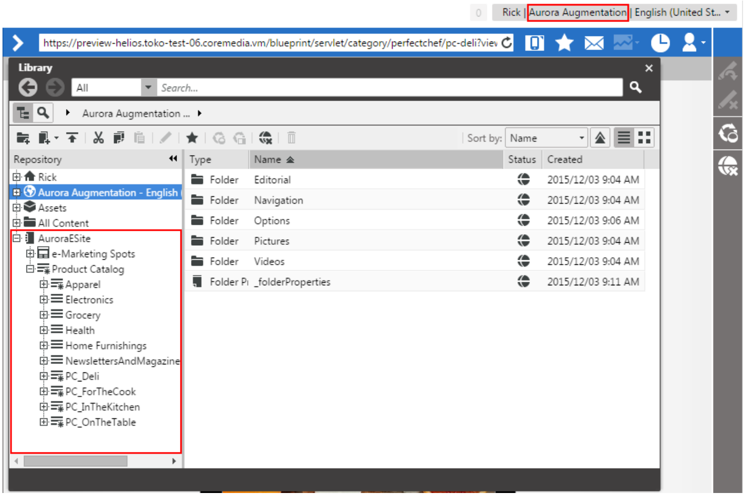


Figure 6.7. e-Commerce content in Library

In this view you can browse through the catalog as you can browse through the CMS content. You can even open a WCS product as a read-only content in *Studio* with a double-click or create an `Augmented Category` (see Section “Adding e-Commerce Category” [235].

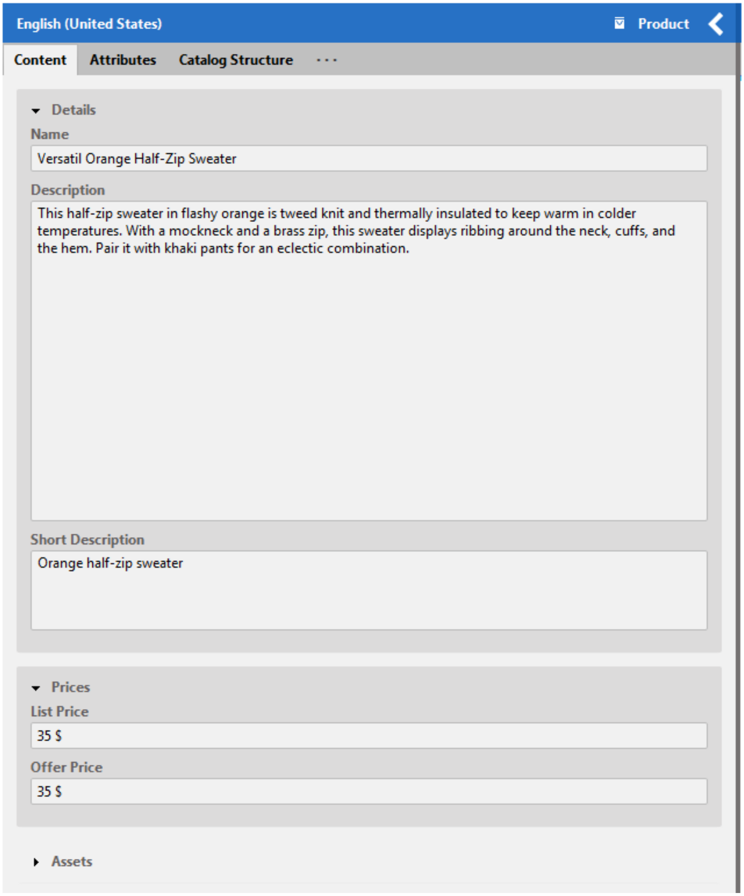


Figure 6.8. WCS product opened in Studio

Selecting a Workspace

CoreMedia Studio supports working with IBM WCS Workspaces. In order to use the content of a specific workspace, proceed as follows:

1. Click the arrow icon beside your name in the *Preview Toolbar*.
2. Select the workspace from the *Workspace* dropdown field.

In the Library you will see now content from this workspace.

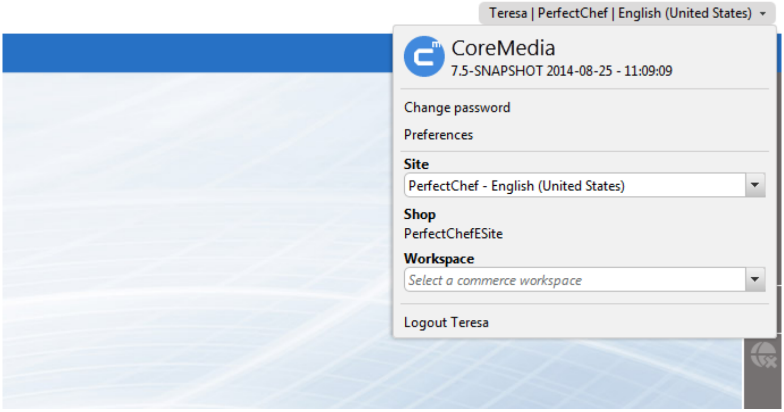


Figure 6.9. Workspaces selector in User Preferences Dialog

If you work in a workspace, you have access to IBM content that might not be visible in other workspaces. Nevertheless, in *CoreMedia DXP 8* is no such concept. This might lead to invalid links in your CMS content. For example, you work in workspace A and create a `Product Teaser` that links to product PA from this workspace. Everything is fine, you see the product in your site. Then, you switch to workspace B in which product PA does not exist. Your product teaser is still there but the link to product PA is invalid, because PA does not exist in workspace B.

There is no common procedure to deal with this. You should be aware of the issue and address it through organizational precaution.

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.

The results are shown in the Library.

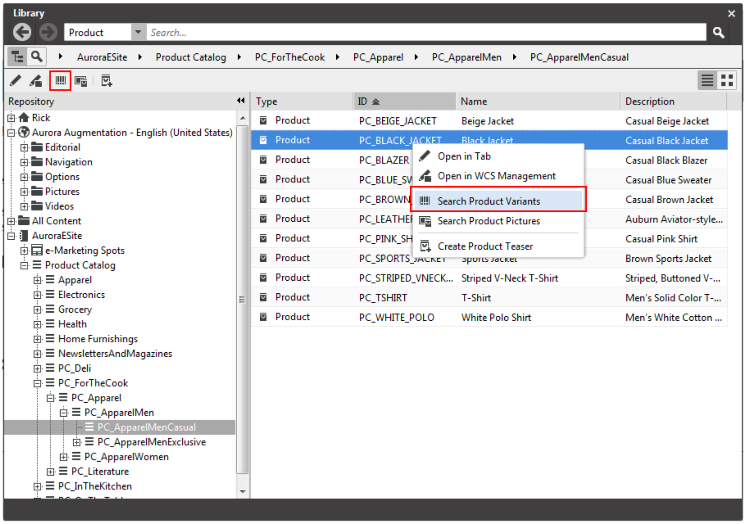


Figure 6.10. Search for product variants

Searching for Product Pictures

When you have mapped pictures from the CoreMedia system to products and product variants in the *Management Center*, 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.

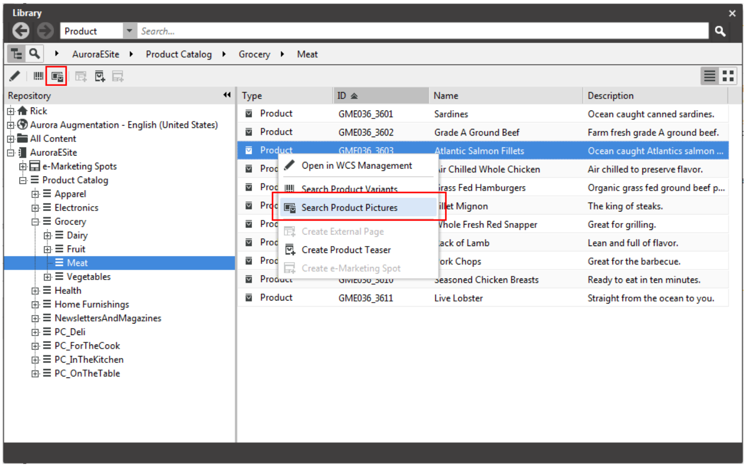


Figure 6.11. Search picture documents assigned to a product

In the result, you will find the `Picture` items that links to the product.

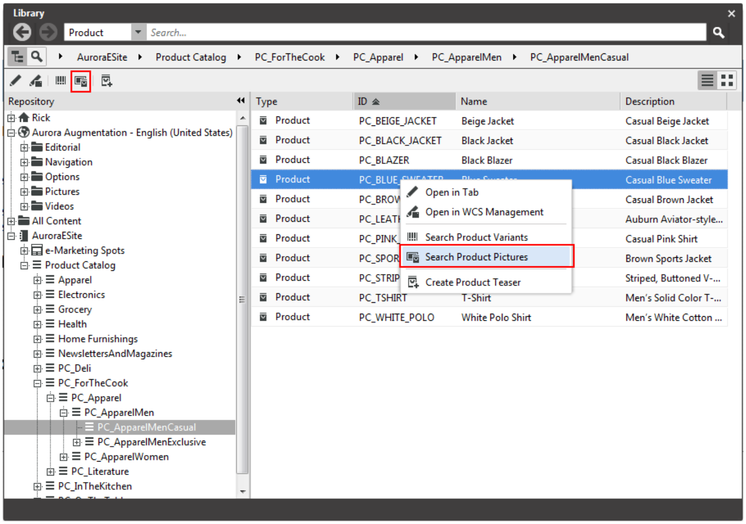


Figure 6.12. Found picture documents assigned to a product

Opening the WebSphere GUI

CoreMedia Digital Experience Platform 8 seamlessly integrates content from IBM WebSphere Commerce Server into *CoreMedia Studio* so that you can add e-Commerce content to your pages. If you want to edit items from the commerce system, you can directly open the WebSphere Management Center from *Studio*

1. From the Favorite Bar select *Favorites* and from the menu select **WCS Management**.

or

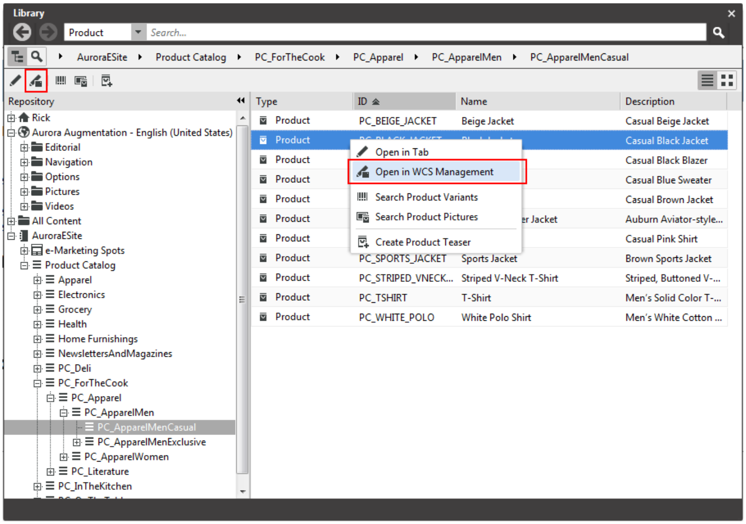


Figure 6.13. Open WCS Management from the Library

1. Right-click on a product in *Studio* and select **Open in WCS Management** from the context menu.

A window with the Management Center opens up where you have to log in with your account.

6.2.2 Adding Commerce Content to CMS Pages

This section describes how you can add content from the IBM WebSphere Commerce system to CoreMedia CMS sites.

Adding a Product Teaser

You can add teasers to your e-Commerce products to your site, using the `Product Teaser` content type. By default, the teaser text and image is taken from the e-Commerce 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 e-Commerce product.

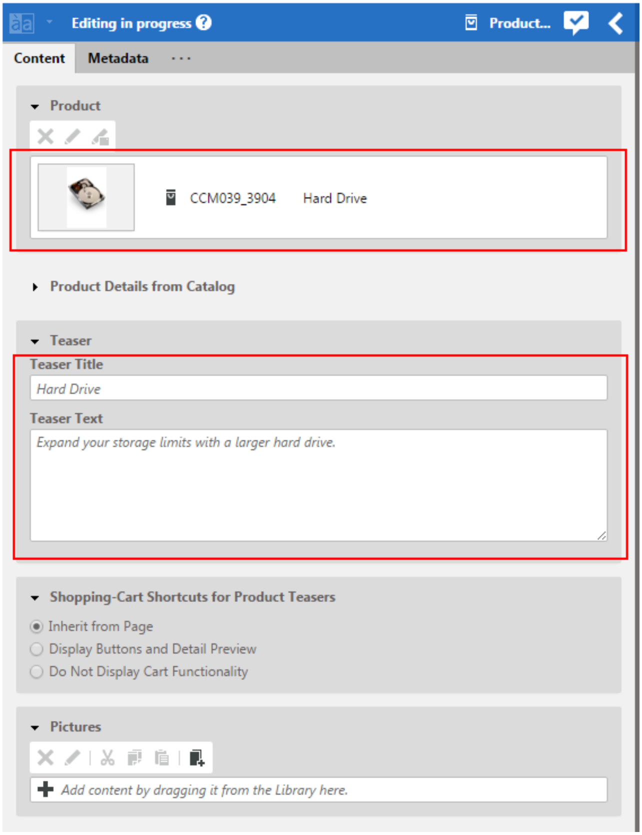


Figure 6.14. New product teaser

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 e-Commerce. 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” [128] 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.

Adding e-Commerce Category

In order to add a category to your CMS site, you have to augment the e-Commerce catalog category. The `Augmented Category` content is automatically stored below the `Augmentation` folder in your site folder. The icon of the e-Commerce catalog category in the `Product Catalog` in the Library changes in order to indicate the augmentation.

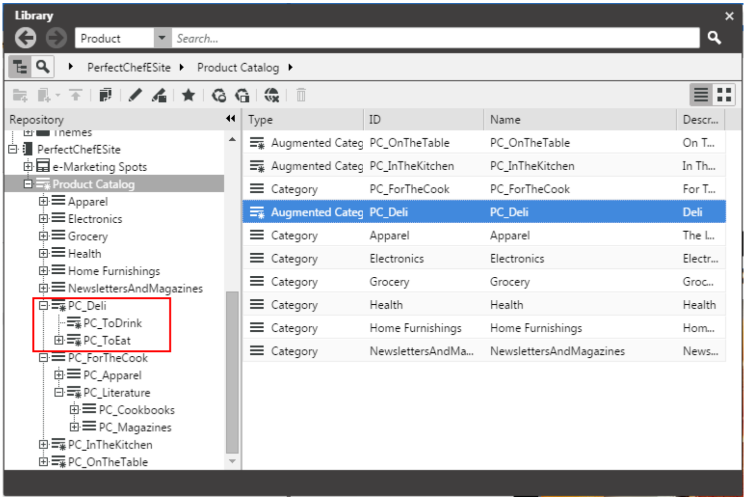


Figure 6.15. Augmented categories in the tree view of the Library with specific icon

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 e-Commerce 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.

Adding an e-Marketing Spot

You can add an e-Marketing Spot from IBM WebSphere Commerce into *CoreMedia DXP 8* 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.

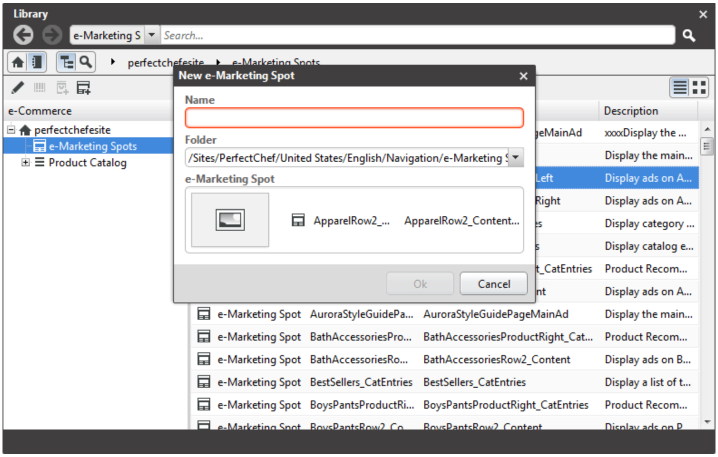


Figure 6.16. Creating an e-Marketing spot

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.

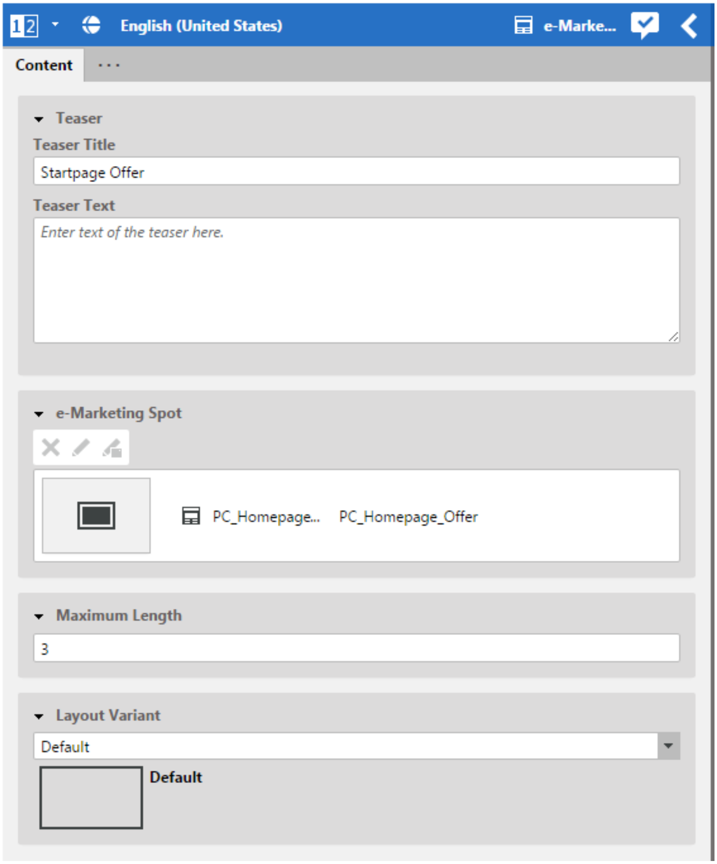


Figure 6.17. Newly created e-Marketing spot

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 DXP 8* site is connected with the IBM WebSphere Commerce system, then you can add content from the CoreMedia system to specific locations of WebSphere shop pages. There are the following different methods:

- Adding content via the CoreMedia Content Widget

  Allows you, to add content items to WebSphere pages.
- 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 IBM system with images from CoreMedia.

- Adding editorial pages

  Allows you, to add linked editorial pages to the WCS. These pages do not appear in the navigation but can be reached via teasers.

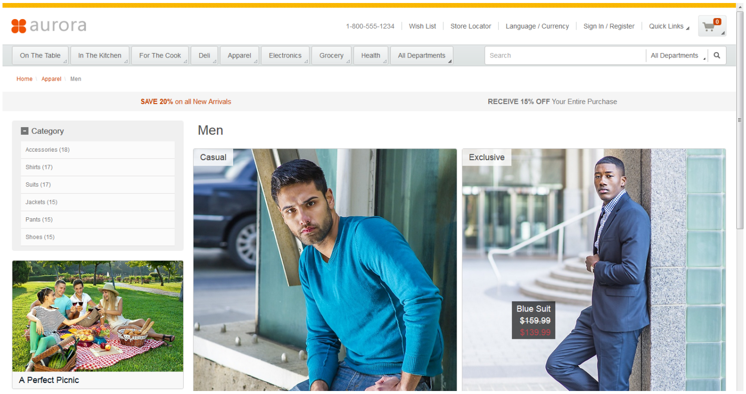


Figure 6.18. Aurora website with CMS content

Search Path for CMS Content for the Content Widget

Adding the *CoreMedia Content Widget* to a slot of a layout managed by the IBM Commerce Composer as described in Section "Adding CoreMedia Content Widget to WCS" [240] is the main way to get content from the CMS into pages delivered by the WCS.

In general, you can define content at the following positions:

- Content for specific IBM 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 "Adding Category Specific Content" [245]
- 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 "Adding Specific Content for Product Detail Pages (PDP)" [247].
- Specific content for pages in your WCS store that are not catalog pages, for example, the homepage, search pages or others. This is described in Section "Adding Content to Other Pages" [249]

- Default content for all IBM 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 “Adding Default Content for Categories and Product Detail Pages” [244].
- Separate pages, that contain the header and footer of the WCS, but only show CoreMedia content in the main part of the page. These pages are not part of the current section, see Section “Adding CMS Pages or Articles to the WCS” [250] and Section “Adding CMS Microsites to the WCS” [251] for details

The content that is shown in the slot is taken from specific `Augmented Pages` or `Augmented Categories` 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).

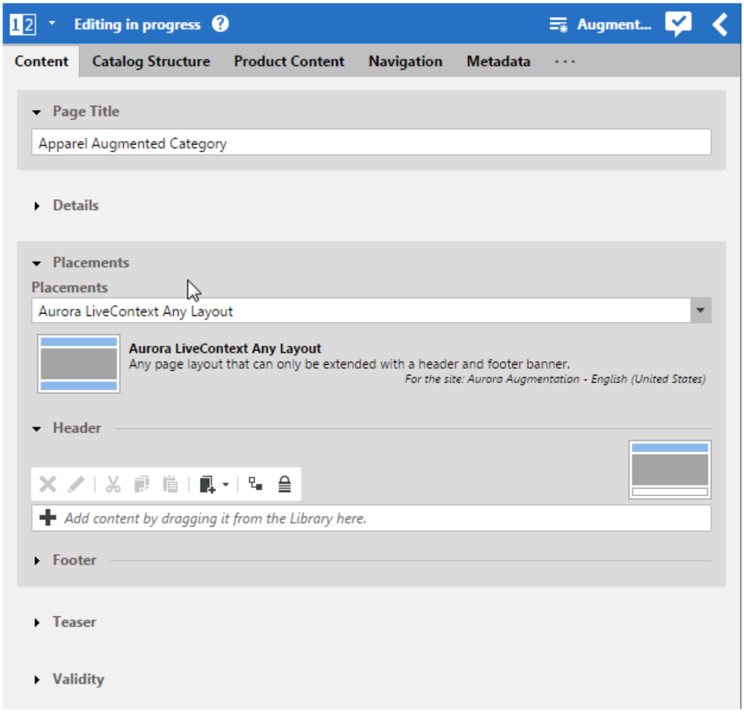


Figure 6.19. Example of a page with a page grid for fragment use. The placements that corresponds to the commerce layout are highlighted in blue and are the only ones that can be edited.

The following list shows how the CoreMedia system determines the placement whose content should be inserted into a WCS category overview page. The search is done hierarchically along categories of the WCS category tree.

1. Select the `Augmented Page` that is connected with the IBM 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 6.20, "Decision diagram" [240] shows this process in more detail.

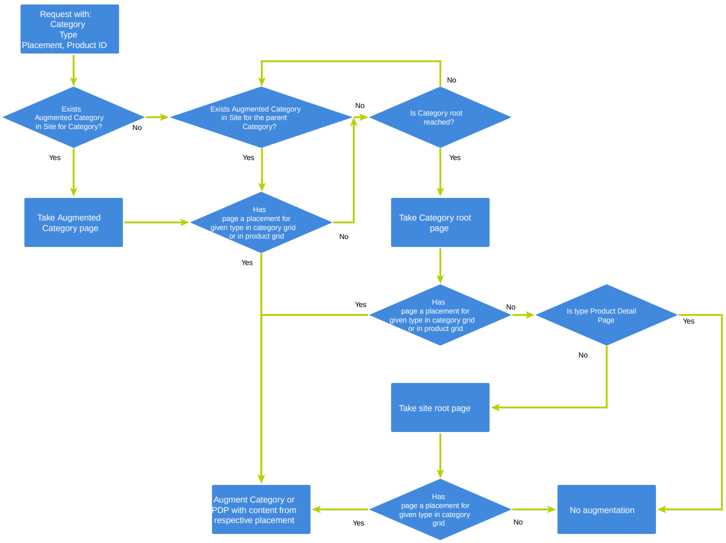


Figure 6.20. Decision diagram

Adding CoreMedia Content Widget to WCS

The *CoreMedia Content Widget* is deployed into pages of the IBM WCS. There, it shows content delivered by the CMS system in pages delivered by the WCS system. You can use two approaches:

- Use the widget to include content in existing pages, for example, product detail pages or categories

→ Create two new pages in the WCS that show content completely delivered by the CMS but with header and footer from the WCS, for example, for micro sites or complete articles.

Adding Widget to Existing Pages

In order to connect a slot of an IBM WCS layout with the CoreMedia system, proceed as follows.

1. Open the layout in *Commerce Composer* in *IBM Management Center for WebSphere Commerce*.
2. Select the slot to which you want to add CoreMedia content and select the *CoreMedia Content Widget* from the list of provided widgets.

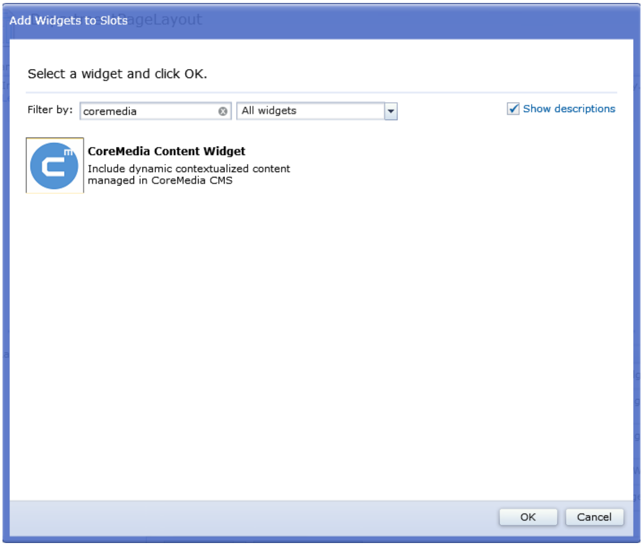


Figure 6.21. Add widget to slot

3. 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.

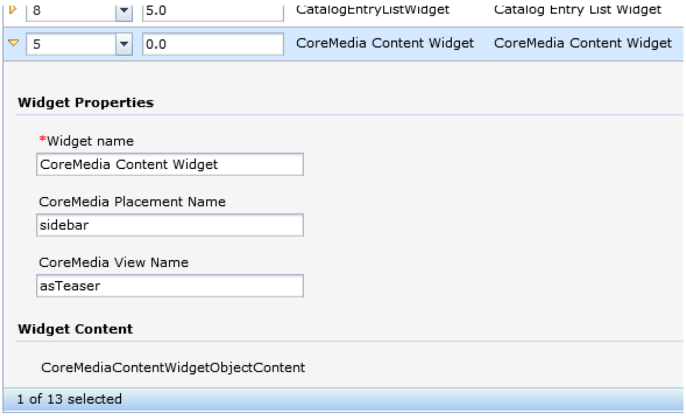


Figure 6.22. Configure CoreMedia Content Widget

Adding Widget to new Page

> The CoreMediaContentDisplay and MicroSite features are only available, when the SEO-URL configuration of your *IBM WCS* has been customized by your administrator as described in Section 3.3.12, “Setting up SEO URLs for CoreMedia Pages” in *CoreMedia Digital Experience Platform 8 Developer Manual*.

You can use *CoreMedia DXP 8* to show CoreMedia content, such as articles, or complete micro sites in the WCS context (see Section “Adding CMS Pages or Articles to the WCS” [250] and Section “Adding CMS Microsites to the WCS” [251] for details). You need two different pages in the WCS, one for each use case.

So, create two new pages in the WCS, both with a layout that contains only the CoreMedia Widget but with different configuration.

1. Create two new Pages in the WCS Commerce Composer, which define the URL keyword in the *URL keyword* field. This is "CoreMediaContentDisplay" and "CoreMediaMicroSite".

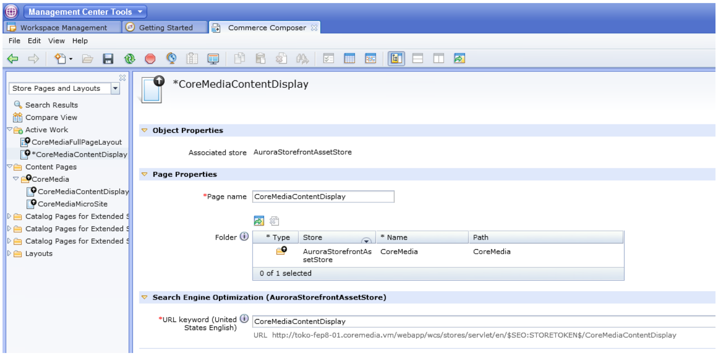


Figure 6.23. Creating page for Content Display

2. Create two new layouts and connect them with the pages created in step one.
3. In both layouts, define one slot and place the CoreMedia Content Widget into the slot.
4. For the CoreMediaContentDisplay layout, no property settings, except the *Widget Name*, are required in the widget. For the CoreMedia Micro Site, add "asMicroSite" to the *CoreMedia View Name* property of the widget (see Figure 6.24, “ Configure the CoreMedia Content Widget for micro sites ” [243]) .

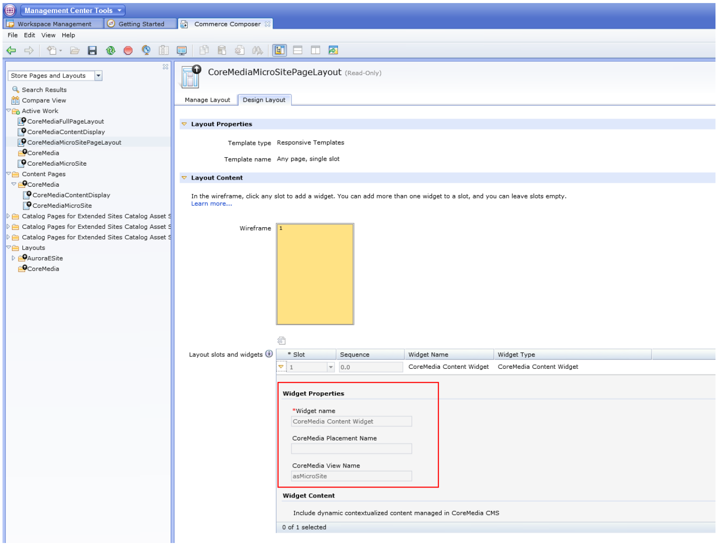


Figure 6.24. Configure the CoreMedia Content Widget for micro sites

Now, you can add, for example, an article to a collection which is shown in a WCS 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.

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 "Adding Category Specific Content" [245]), 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` document 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.

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 document). 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.

Adding Category Specific Content

> Prerequisite is, that the category in the WCS 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).

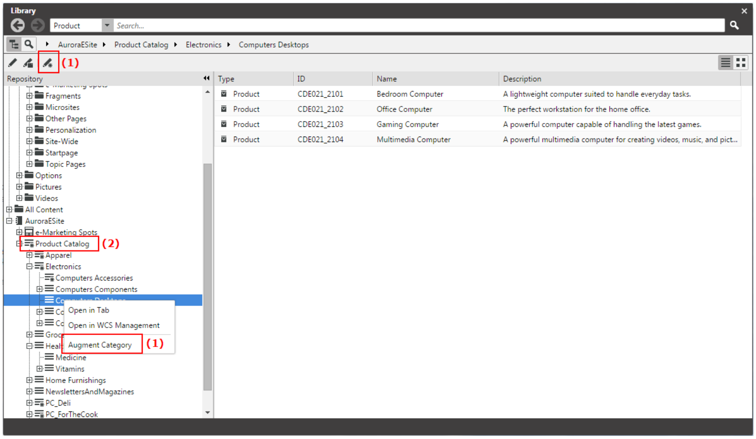


Figure 6.25. Augment a category

2. Select **Augment Category** (1) from the context menu or clicke 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.

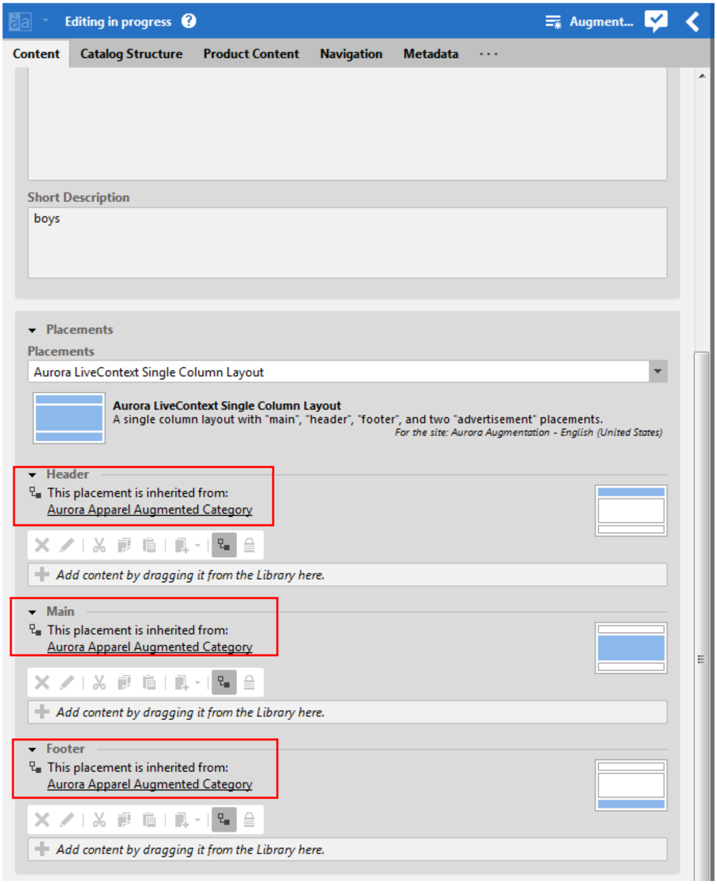


Figure 6.26. Newly created augmented category

3. Add your content to the placement in the *Content* tab, whose name corresponds to the setting of the *CoreMedia Content Widget*.

Now, the category overview page shows the defined content.

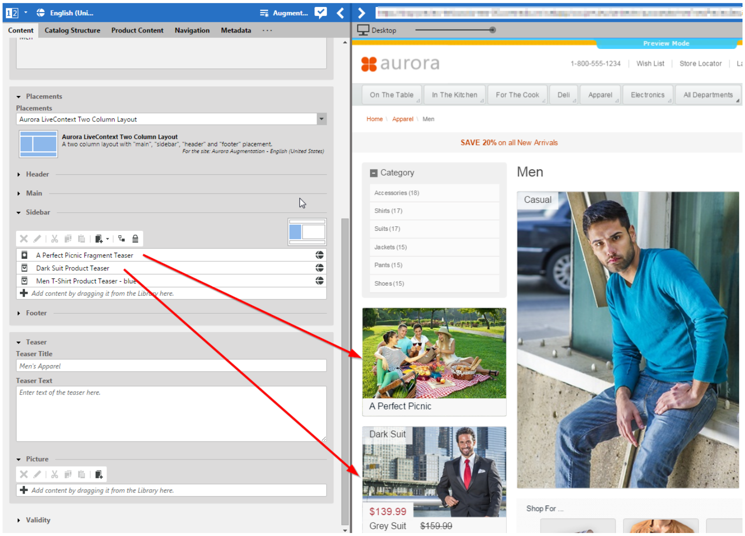


Figure 6.27. Augmented Category with content in the sidebar

Adding Specific Content for Product Detail Pages (PDP)

> Prerequisite is, that the PDP in the WCS has a layout assigned that contains the CoreMedia Content Widget.

Augmenting a PDP is done via the categories to which the PDP belongs. You can add specific content to certain PDPs through an `Augmented Category` item. The content in the placement of the *Product Content* tab of the `Augmented Category` whose name corresponds to the name defined in the *Content Widget*, is shown in the PDP and in all PDPs belonging to subcategories that are not linked to their own `Augmented Category`.

1. In the Library, select the category which contains the products that you want to augment and open the context menu.

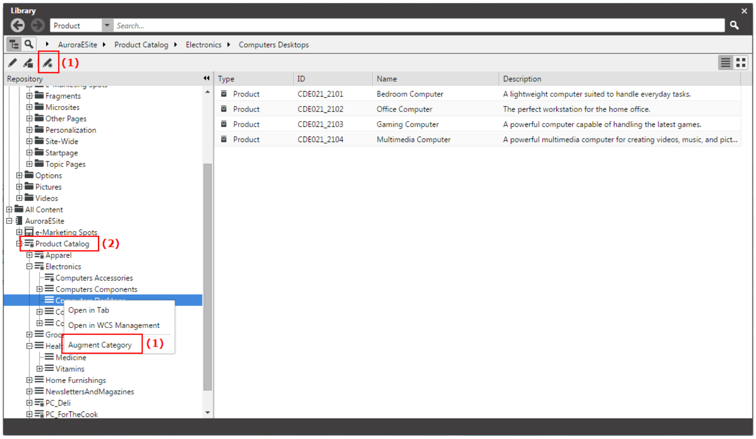


Figure 6.28. Augment a PDP

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.

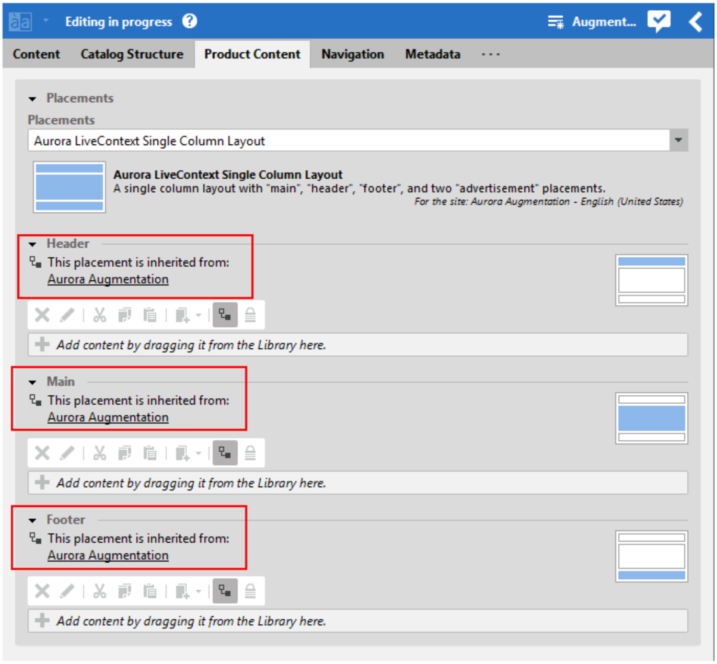


Figure 6.29. Newly created augmented category

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 page shows the defined content.

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*.

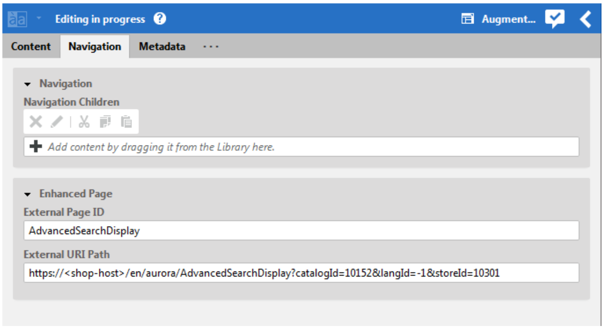


Figure 6.30. Navigation Settings for a custom non SEO Form

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>/en/aurora/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.

   In case of a non-SEO URL like the following

   ```
   https://<shop-host>/en/aurora/AdvancedSearchDisplay?
           catalogId=10152&langId=-1&storeId=10301
   ```

   you have to add additional information to the *External URI Path* field. This is especially required to get a preview in *Studio*.

Add the part of the URL behind `/en/aurora` to the *External URI Path* field. See Figure 6.30, "Navigation Settings for a custom non SEO Form" [249] 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.

Table 6.2. Placeholders for URL parameters

Token	Description
storeId	The current store Id
catalogId	The current catalog Id
langId	The current language Id

When you have done everything right, you will see the augmented page in the *Studio* preview.

Adding CMS Pages or Articles to the WCS

As a prerequisite, you need to define a CoreMediaContentDisplay Page in the WCS that contains the CoreMedia Widget as described in section "Adding Widget to new Page" [242]. The CoreMediaContentDisplay feature is only available, when the SEO-URL configuration of your *IBM WCS* has been customized by your administrator as described in Section 3.3.12, "Setting up SEO URLs for CoreMedia Pages" in *CoreMedia Digital Experience Platform 8 Developer Manual*.

You can not only augment existing pages in the WCS, but you can also add pages or Articles to the WCS that were completely created in the CMS. The navigation behavior differs slightly, depending on the scenario implemented at your company:

- In the commerce-led scenario all pages are delivered by the WCS system and you only use the CMS to augment this content. The navigation is completely maintained by the WCS. So, when you add a page it is not included in the navigation, but can only be reached through links or teasers.
- In the content-led scenario, on the other hand, the navigation is created by the CMS. So, when you add your page to the navigation of the site root `Page` item, it will be shown in the main navigation. See, Section "Changing the Navigation" [257] for more details on the navigation.

In order to add a CMS page or article to your WCS 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 WCS 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.

Adding CMS Microsites to the WCS

As a prerequisite, you need to define a microsite in the WCS that contains the CoreMedia Widget as described in Section "Adding CoreMedia Content Widget to WCS" [240]. The microsite feature is only available, when the SEO-URL configuration of your *IBM WCS* has been customized by your administrator as described in Section 3.3.12, "Setting up SEO URLs for CoreMedia Pages" in *CoreMedia Digital Experience Platform 8 Developer Manual*.

Technically, a microsite is a normal content of type `Page`. However, if a normal page is shown in the WCS, only the content of the *Main* placement is shown. For a microsite, on the other hand, the content and layout of the whole page grid is shown. Microsites support SEO conform URLs.

Microsites are only supported in the commerce-led scenario.

In order to create a microsite, proceed as follows:

1. Create a CMS page as described before in Section "Adding CMS Pages or Articles to the WCS" [250]. Select an appropriate layout and add content to all placements.
2. Mark the page as a microsite by adding a boolean property with name `livecontext.policy.commerce-microsite-links` to the *Local Settings* section of the *Settings* tab. Set the property to "true".

   Now, in the Studio preview, the page is shown in the WCS context, that is with header and footer of the WCS.
3. Adjust the page title in the `Page Title` field on the *Navigation* tab. This page title is used as part of the SEO URL.

Adding Content with the Asset Widget

With the *CoreMedia Asset Widget*, you can add pictures, videos and downloadable content to product detail pages of the *IBM WebSphere Commerce Server Management Center*.

To add this content to the product detail page, you have to perform two steps:

→ Replace the default *IBM WCS Full Image Widget* in the layout of the product detail page with the *CoreMedia Asset Widget*.

→ Link pictures, video and download items with the product.

Adding CoreMedia Asset Widget to WCS

Add the *CoreMedia Asset Widget* to the required slot of a product detail page layout in *Management Center*. The widget has the following options:

Table 6.3. CoreMedia Product Asset Widget configuration options

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*
Include Downloads	If checked, an *Additional Downloads* list is rendered from CMS *Download* documents that are associated with the product.

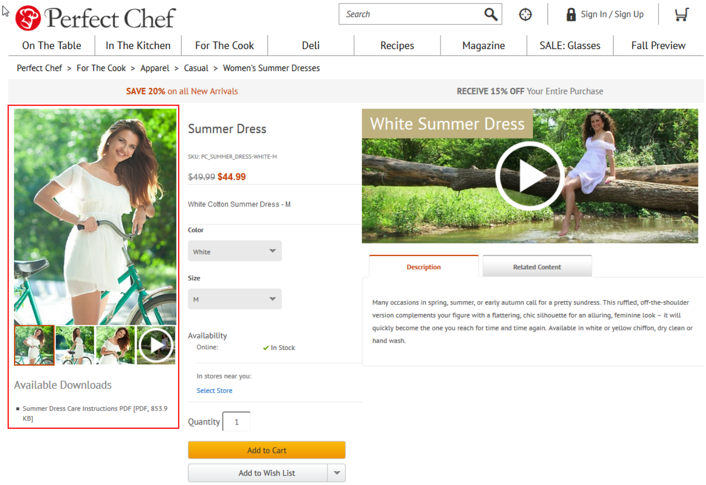


Figure 6.31. Product detail page with image gallery and download content

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 IBM WebSphere commerce 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 document.
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.

The *Assigned Products* property is the same that is used to replace a product or SKU image as described in Section "Replacing WCS Images in Products and SKUs with CMS Images" [254]. 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 6.31, " Product detail page with image gallery and download content " [252]

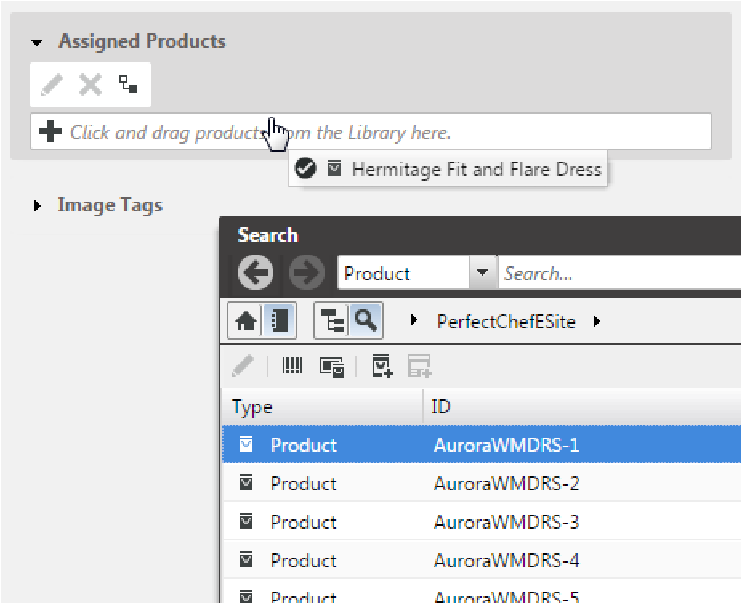


Figure 6.32. Assign a product to a picture

Replacing WCS Images in Products and SKUs with CMS Images

CoreMedia DXP 8 allows you to manage images in the CoreMedia system that will be included in products and SKUs of the IBM WebSphere Commerce system.

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 IBM system.

Fallback images

You don't have to assign every SKU to a picture document. If an SKU is not assigned to a picture document the asset management searches for the picture document 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 an IBM WebSphere 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 document.
3. Find the product for which you want to define an image in the Library and drag it onto the *Assigned Products* link list.

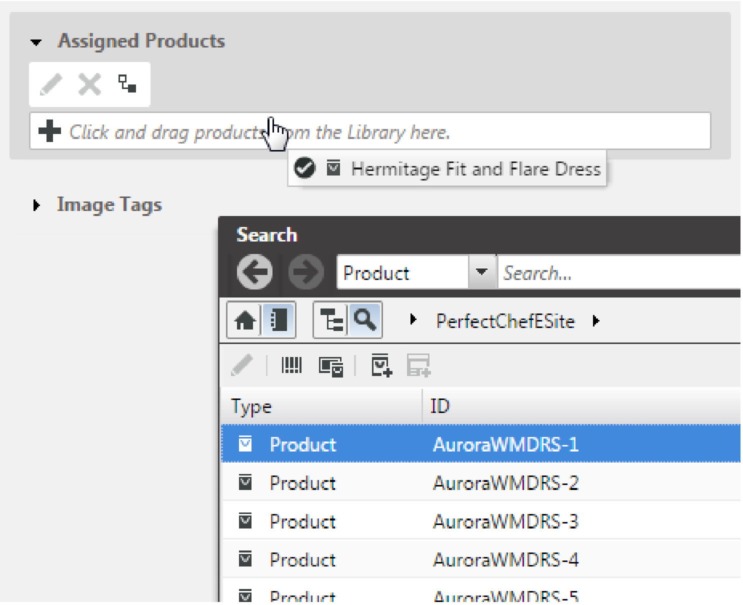


Figure 6.33. Assign a product to a picture

The *Assigned Products* property is the same that is used to fill the Asset Widget as described in Section “Adding Content with the Asset Widget” [251]. 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

In order to let the IBM WebSphere 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 *IBM WebSphere Commerce Server 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 WCS.

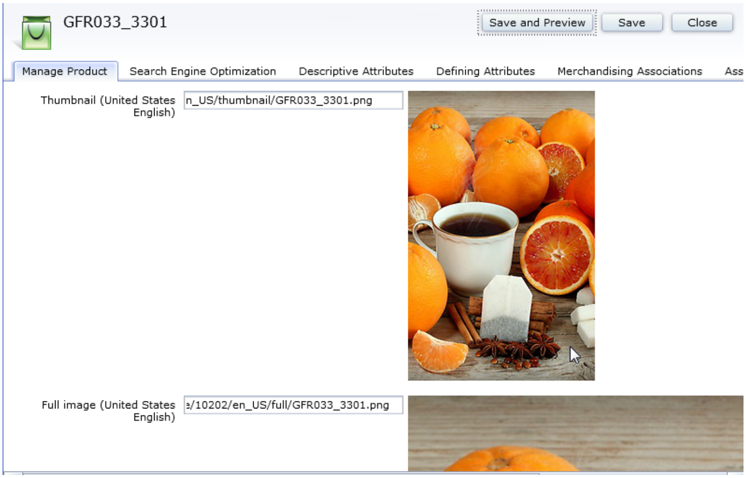


Figure 6.34. Set Product Image URLs in Management Center

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.

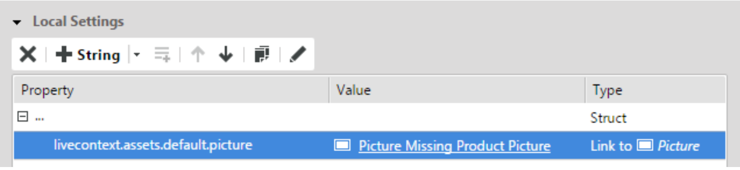


Figure 6.35. Set default catalog picture in Studio

Now you have defined a default image for your site.

Replacing WCS Images in Categories with CMS Images

CoreMedia DXP 8 allows you to manage images in the CoreMedia system for categories of the IBM WebSphere Commerce system. The mechanism and steps are equivalent to the product image management feature as described before.

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 IBM system.

Add the following CoreMedia URL formats to the category definition in the IBM WebSphere 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
```

IBM 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 "Placeholder Resolution for Asset URLs" in *CoreMedia Digital Experience Platform 8 Developer Manual* must activated.

Changing the Navigation

This feature can only be used out-of-the-box in the content-led scenario which is demonstrated in the Perfect Chef example site.

In the commerce-led scenario, the pages are rendered by the WCS and so is the navigation. Here, the navigation follows the hierarchy defined in the WCS. In the content-led scenario, the navigation also bases on the WCS category hierarchy, by default. However, in the content-led scenario you can manipulate the navigation.

In the following, two use cases are described. A simple rearrangement of the categories and an augmentation with pages from the CMS.

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.

The changed navigation will not influence the inheritance of content or settings of the moved category. This items will always be inherited along the catalog hierarchy defined in the WCS.

In order to add a `Category` or `Augmented Category` to another navigation parent, proceed as follows:

1. In the catalog view of the Library select the parent `Category` to which you want to add the other `Category`. If the parent `Category` is not already an `Augmented Category` item, augment it as described in Section "Adding Category Specific Content" [245].
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 WCS catalog hierarchy.

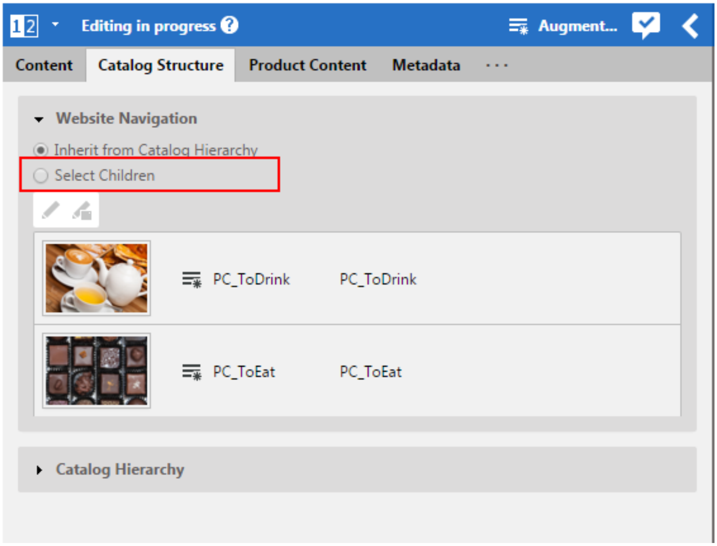


Figure 6.36. Make navigation editable

3. Drag the `Category` that you want to add to the navigation into the *Website Navigation* link list.

Now you are done. The added category appears in the navigation. You can check the original WCS catalog hierarchy on the *Catalog Hierarchy* tab.

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 “Adding Category Specific Content” [245].
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.

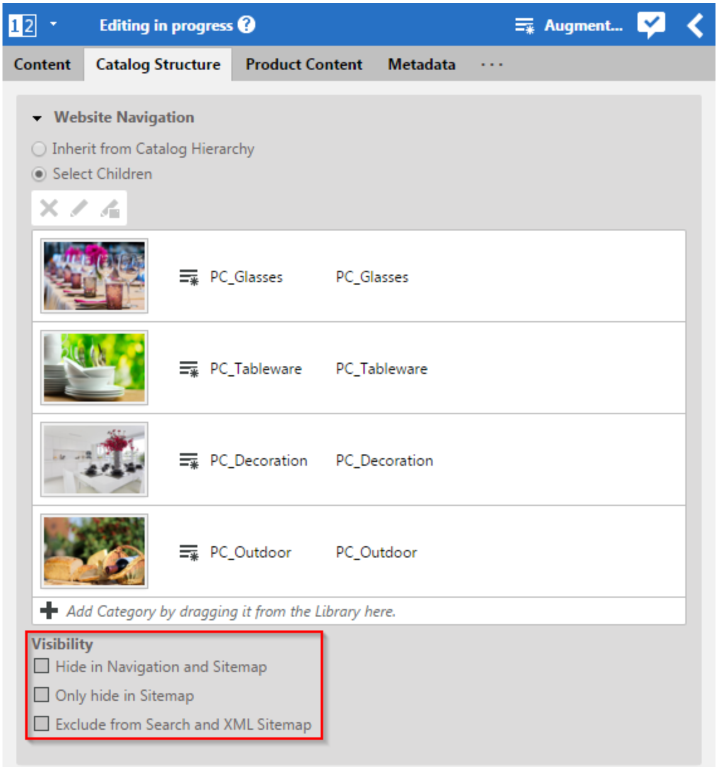


Figure 6.37. Hide from navigation

The `Category` disappears from the navigation.

Adding Pages to the Top Navigation

Sometimes you may want to add editorial pages to the top navigation of the web-site. To do so proceed as follows:

1. Create a new `Page` content item using **Create from Template** from the **Create Content** menu.
2. Drag the root `Page` 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 6.38. New page in navigation

3. When you want to move the page to a different position in the navigation menu, open the root `Page` content item. In the *Navigation* in the *Navigation* field, move the newly created page to the position you want.
4. Adapt the content in the new page to your needs.

6.2.4 Visualize *CoreMedia DXP 8* content on shop pages

If a shop page contains *CoreMedia DXP 8* placements, you can visualize these placements by clicking the "Show Placements button".

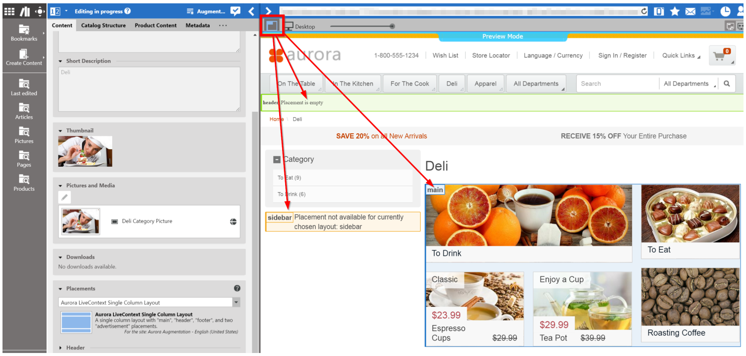


Figure 6.39. Highlighting of CoreMedia DXP 8 content on shop pages

You can find the button in the toolbar beyond the preview frame, placed left-handed to the device-type-slider (see red box). The button is only visible when the page is a shop page and contains *CoreMedia DXP 8* placements.

By clicking the button, the *CoreMedia DXP 8* placements on the page are highlighted. There are three types of placements.

1. Blue Box: If the placement is filled you will find a blue border around it along with the placement name.

2. 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.
3. Orange Box: If the placement is not available because the *CoreMedia DXP 8* pagegrid layout does not support this placement at all, you will find a orange box with that information with the placement name.

7. Working with Personalized Content

CoreMedia Adaptive Personalization feature

Personalized content is supported by *CoreMedia Adaptive Personalization* which is integrated into *CoreMedia Studio* and provides the basis for creating personalized websites. Click behavior or explicit user interests are accumulated to provide the most appropriate content for the current user. The graphical user interface allows you to create personalization rules that select content to be displayed. You can use predefined Personas in order to preview the personalized site before it is published within *CoreMedia Studio*.

Special content types that are part of *CoreMedia Blueprint* are used to provide the personalization functionality:

- A content type for test personas. In the default implementation this is the type "Persona".
- A content type for explicit personalization. In the default implementation this is the type "Personalized Content".
- A content type for segments. In the default implementation this is the type "User Segment".
- A content type for personalized search. In the default implementation this is the type "Personalized Search".

If your system does not base on *CoreMedia Blueprint*, you might have other content items for the purpose of personalization.

7.1 Creating a Condition

The following example shows you how to create a condition in a `Personalized Content` content item. The content item already contains a default content "Recommendations" and a conditional content " Return on Engagement". You can find a list of conditions in Section 9.2, "Conditions" [312]:

1. In order to add conditions you need to open the editor panel. Click *Show conditions*.

The editor panel opens up but is empty because no condition exists yet.

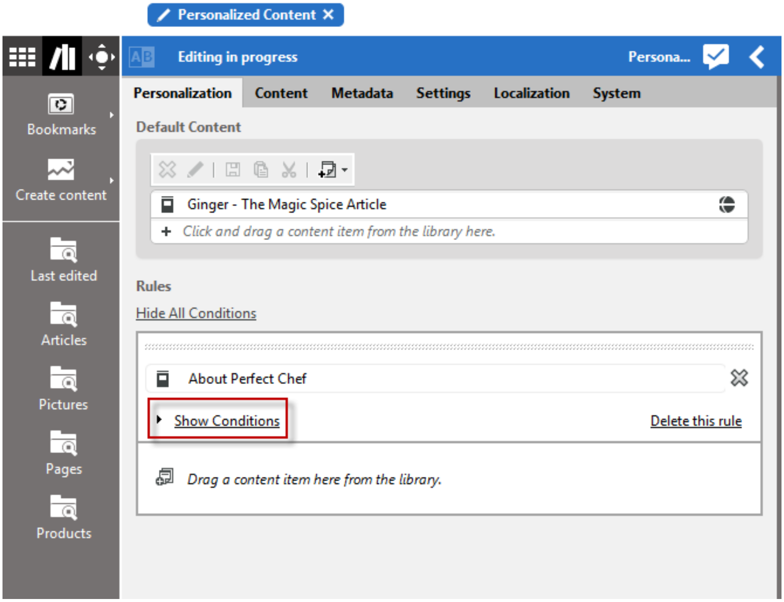


Figure 7.1. Open the editor panel

2. Click *Add condition* to add a new condition.

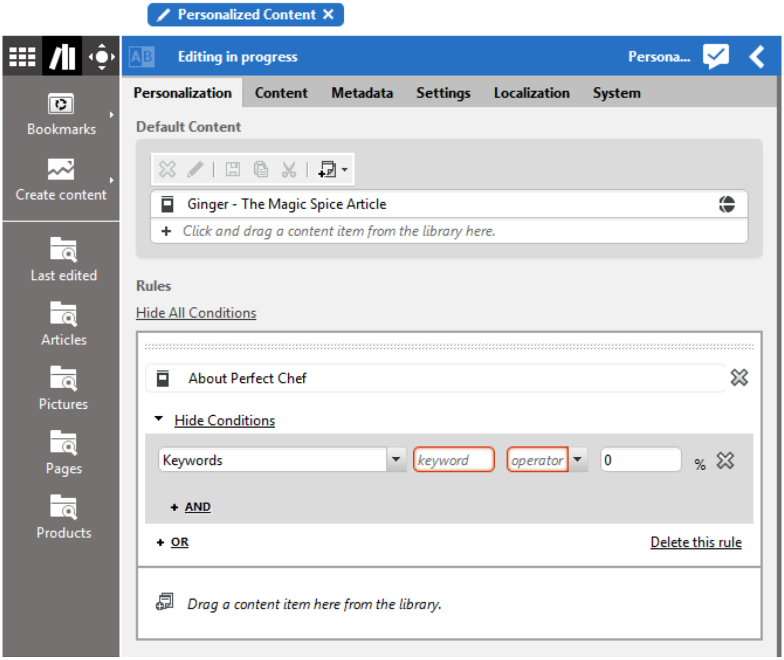


Figure 7.2. A condition has been added

3. Select a condition type from the drop down box. The condition types you see depend on your system configuration.

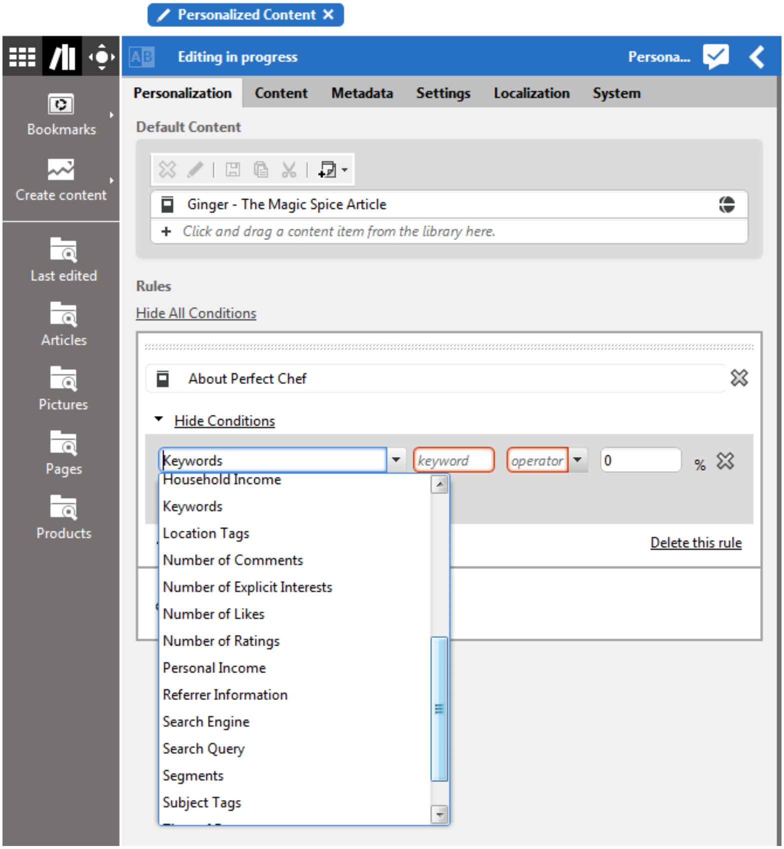


Figure 7.3. Select condition type

The following fields depend on the selected condition type. If you select the *Day of Week* condition, then only two fields remain.

4. Select an operator (on) and a day (Tuesday).

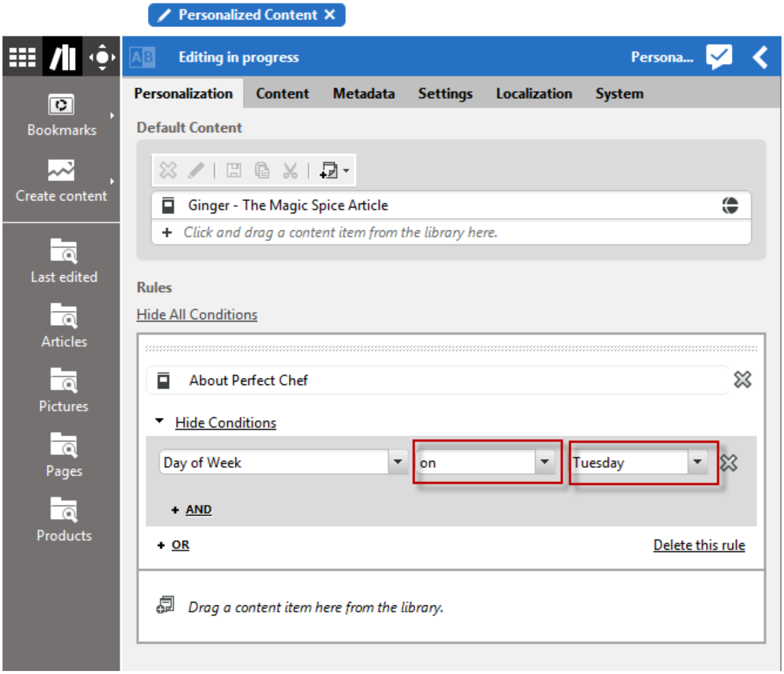


Figure 7.4. Define the condition

Now, you can use OR and AND to add more conditions. The result might look as in the following figure.

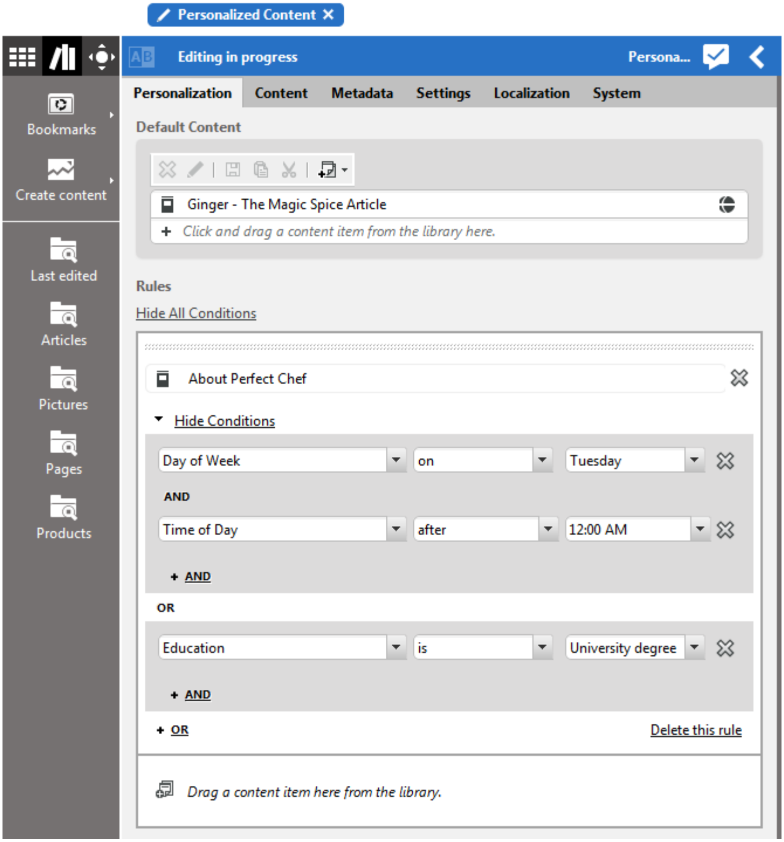


Figure 7.5. Three combined conditions

This condition will be "true" if it is Tuesday and after 04:00 PM or if the Explicit Interest is "true".

7.2 Working with Personalized Content

In this chapter you will learn how to work with personalized content. As an example, a `Personalized Content` content item from *CoreMedia Blueprint* is used.

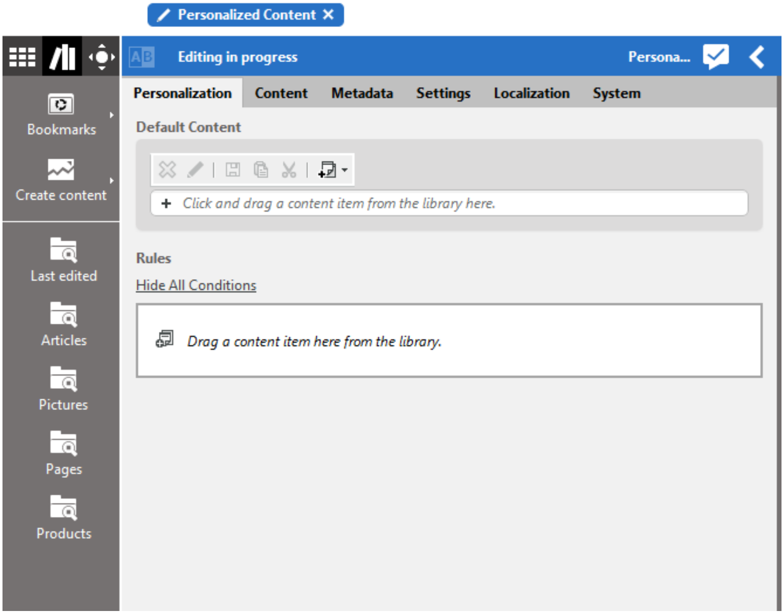


Figure 7.6. An empty Personalized Content content item

A newly created `Personalized Content` content item is empty. It contains a property editor for the title, a rule list drop box and the editor for default content in the *Personalization* tab.

Adding rules and content

Before the `Personalized Content` content item will render any content, you have to define content to select from and conditions to associate with that content. The combination of selecting a content item and adding conditions to it is called a selection rule. A `Personalized Content` content item contains a selection rule list with zero or more rules and optionally default content to show when none of the rules apply.

Adding default content

Default content will be shown when the condition evaluates to "false". You can simply drag content to the default content property editor.

Creating a new selection rule

In order to create a new rule you need to add a content that will be shown when the condition evaluates to "true".

1. Drag and drop a content item to the rule list drop box.
2. Add conditions as described in Section 7.1, “Creating a Condition” [263].

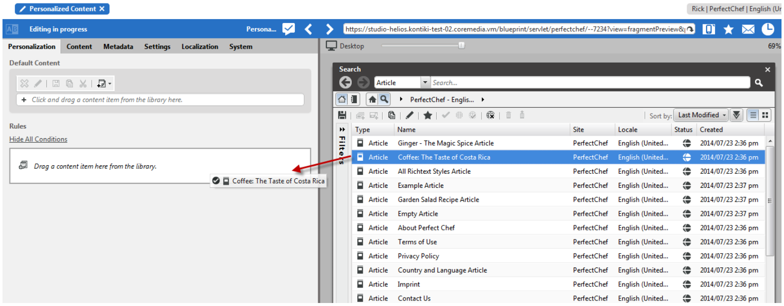


Figure 7.7. Drag content

You can add more than one content item to the `Personalized Content` content item and define different rules for each item. The rules will be evaluated in the order in which they appear in the rules editor.

Delete or edit a selection rule

You can change the content associated with a rule at any time by clicking the delete button. To set a new content item for the rule, you can simply drag another content item in the rule panel.

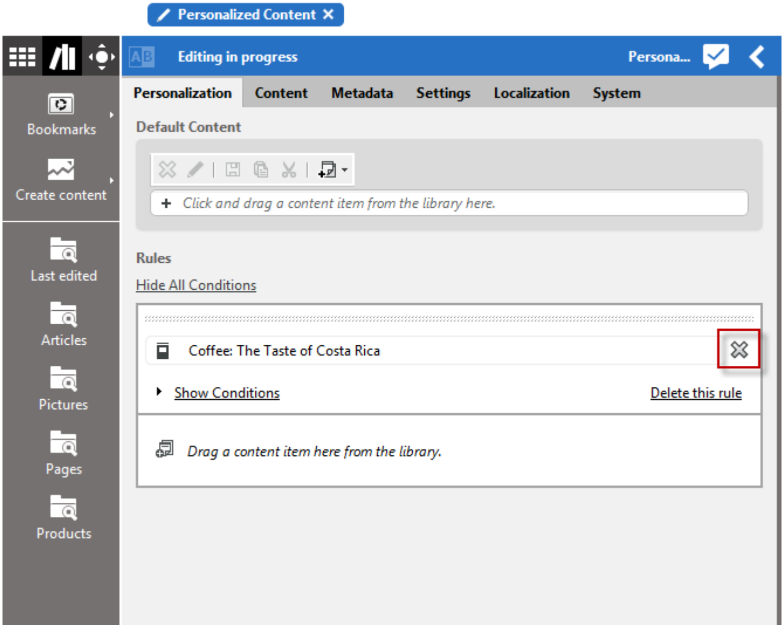


Figure 7.8. Delete a content item

Changing the order of rules

You can change the order of rules in the selection rule list by dragging a rule to its new desired position in the list. The order is essential to the evaluation of the selection rule list.

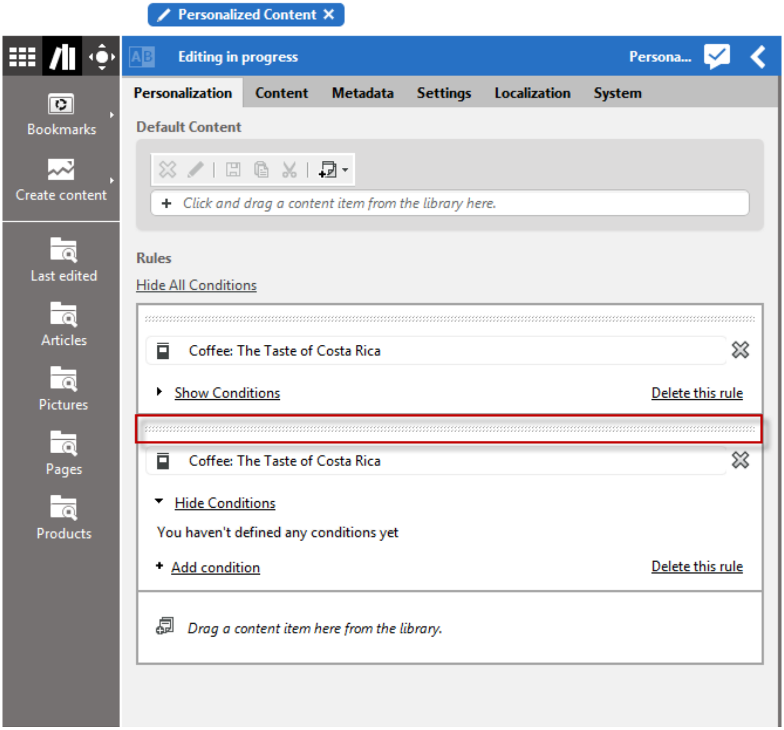


Figure 7.9. Drag and drop the rule

7.3 Working With Personalized Searches

CoreMedia Adaptive Personalization enables the usage of queries that are dynamically enhanced by the context. Queries and query settings are stored in specific content items in the CMS and executed at time of access in the *CAE*. Queries can be defined using the Solr search language. You can extend queries with so called search functions, which are evaluated at execution time and can thus access the active user's context properties. You could have, for example, a property "device" in the user's context that you access with the `containsProperty` function. Then you can use the value of this property in your search. The search functions predefined in *CoreMedia Website Blueprint* are described in the [Adaptive Personalization Manual].

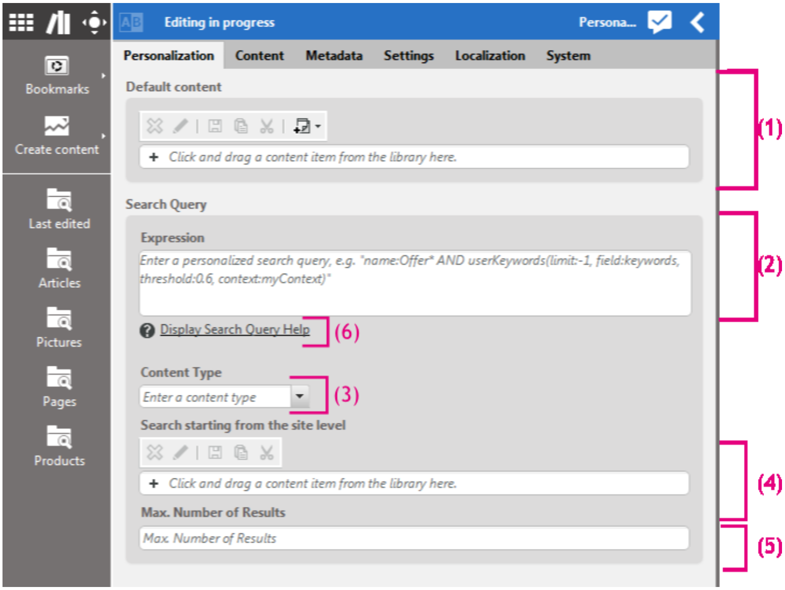


Figure 7.10. The Personalized Search content item

A search content item contains the following properties:

1. The *Default content* Linklist: Here you define content that should be shown if no search results could be found.

2. The *Search Query* text field: Here you define your search query with the search functions.

3. The *Content Type* field: Here you can restrict the type of content items that should be returned.

4. The *Search Starting from the site level* linklist: Here you select in which channels/sites should be searched.

5. The *Max Number of Results*: Here you define the maximum number of returned results.

Display Search Query Help (6) displays a help text.

7.4 Creating User Segments

In segment based personalization, users are mapped to segments, which are mapped to content. Users are shown the content matching their segments.

The following example uses the `User Segment` and `Personalized Content` content items from *Blueprint*. It shows how you create a segment for people born after 1987 and show them the selected content for this target audience.

1. Create a new *User Segment* content item with *CoreMedia Studio*.
2. Enter the description and add a *Date of Birth* condition.

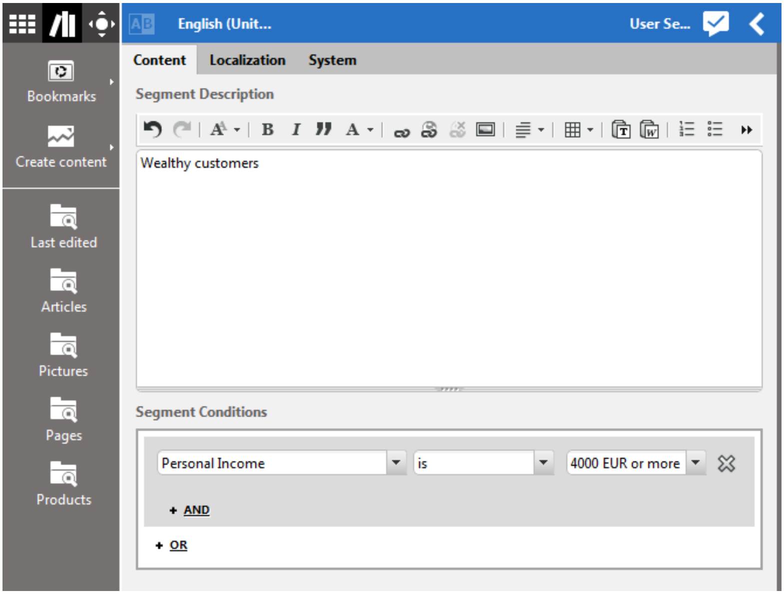


Figure 7.11. Create a condition in a segment

You can use this new User Segment in a Segment condition in a `Personalized Content` content item.

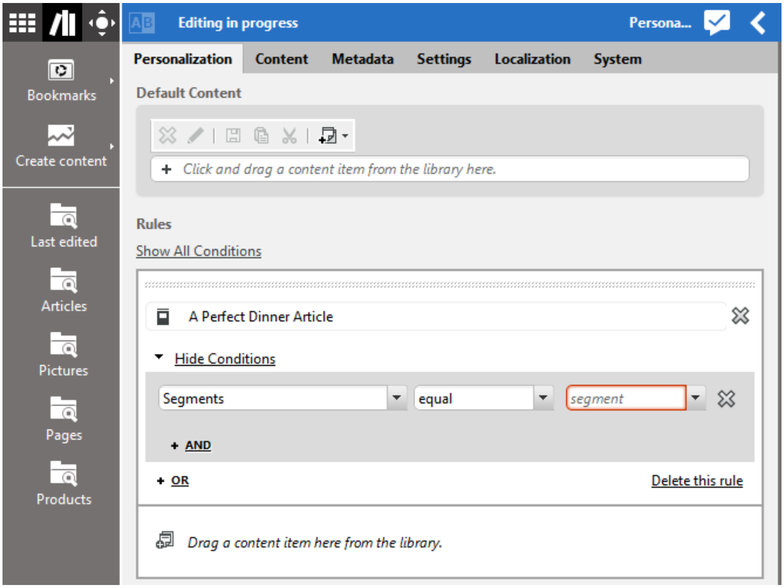


Figure 7.12. Use Segment in Personalized Content

7.5 Working with Personas

Personas allow you to test your personalized web pages by viewing them with different property sets in the preview. Without Personas, an editor can only see the effects of personalization for the current set of properties, which articles have been clicked by the editor within the preview *CAE*, for instance. In order to verify the desired effects of personalized content, an editor needs to be able to mimic a specific Persona with the desired interests. This is achieved by first creating the necessary Persona within the *CoreMedia CMS* repository and switching from one Persona to another in the *CoreMedia Studio* preview view.

7.5.1 Persona Format

Even though the graphical user interface (see Section 7.5.2, “Editing Personas” [279]) assists you in adding and modifying Personas, the data carrying the properties can be syntactically wrong. This may result from a manipulation of a Persona content item with *Site Manager*. In case, the underlying data can't be parsed, a text area with the raw property strings shows up. You are asked to correct the syntactic errors and if corrected, before the content item form can be displayed again. Therefore, it is necessary to understand the underlying format if you want to correct Persona content items.

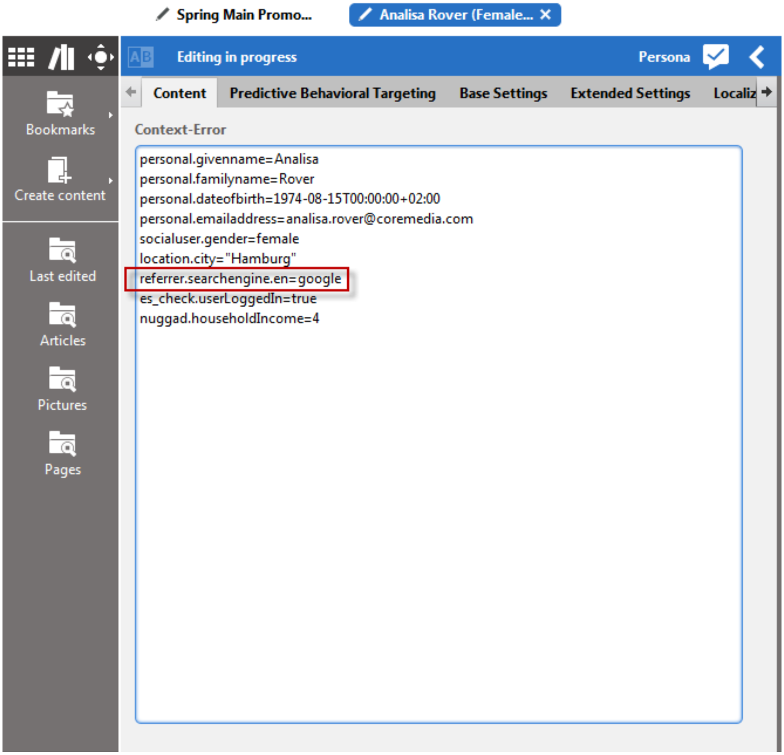


Figure 7.13. Editing Personas in CoreMedia Studio

In the example screenshot above,

```
referrer.searchengine.en
```

causes an error, because multiple dots are not allowed in property keys.

The text in a Persona content item is interpreted as a Java `Properties` object. A property consists of a key and a value. A key must only contain one "." to identify the context of that property. A value follows a key separated by a '='.

Properties are then parsed into one or more contexts based on the key identifiers. Here is an example:

```
personal.givenname=Alice
personal.familyname=Doe
personal.dateofbirth=1967-06-30T00:00:00+02:00
personal.emailaddress=alice@fakehost.com
personal.dateTime=2011-05-18T12:20:00+02:00
keyword.sports=1
keyword.fashion=0.7
```

The part of the key before the '.' is used to create contexts by name. That means in the example there are two named contexts, *keyword* and *personal*. The *keyword* context contains two key-value pairs, sports=1 and fashion=0.7.

Supported Value Types

When context data is read each value provided by a key is interpreted specifically, using one of the format types available.

The following types can be used for values in test contexts:

- String (implicit or explicit)
- Boolean
- Number
- Date

A String is only read explicitly if the value is defined within single or double quotes. The quotes will not be interpreted as part of the value. Without specifying a String value in quotes, the value will be tried to be interpreted as Boolean, Date and Number before it is interpreted as String.

Example

```
example.string="an "example" String"
or
example.string='an "example" String'
```

A Boolean can be specified as either true or false.

A Number can be specified in any valid format that can be parsed to a Float object in the Java language. Examples:

- 1234
- 1234.0
- -1234
- -1234.0

Or using the scientific notation:

- 1.2345E5
- 1.2345E+5
- 1.2345E-5

Dates can be specified using the following formats:

- ISO8601
- yyyy-MM-dd'T'HH:mm:ss.SSSZ
- yyyy-MM-dd HH:mm:ss

7.5.2 Editing Personas

You can use a graphical user interface in *CoreMedia Studio* to create and edit Personas. You can modify and add new properties without the need to know how data is persisted in a Persona.

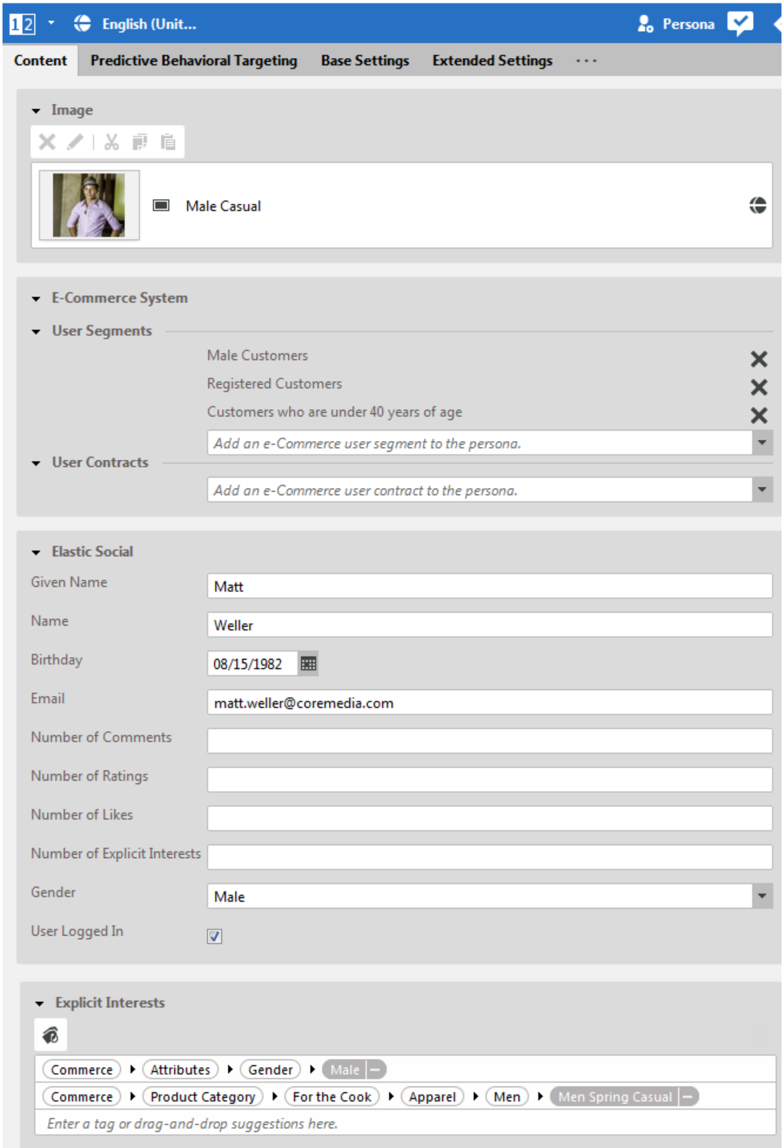


Figure 7.14. Persona GUI (some fields are omitted)

There are two different kinds of properties in this graphical user interface:

- Static properties (for example name and birthday) have a fixed position and are predefined inside the `Persona` content type.

The *Commerce System* property is special in this way, that you can add more than one *User Segment*.

Dynamic properties are used to add custom context data without modifying the content item type. You can add and remove dynamic properties using the GUI. In this example, the "Explicit Interests" section and the *Base settings* tab encloses the dynamic properties.

By convention global Personas are located in the `/Settings/Options/Personalization/Profiles` folder and site specific ones are located in the `/Sites/'site name'/Options/Personalization/Profiles`. Hence, global Personas are available for all defined sites. Site specific ones appear only in the Persona selector if the according site is displayed in the preview of *CoreMedia Studio*.

Personas are only intended for use in the preview *CAE*. Therefore, they do not need to be published. If you have published one by mistake, you can simply withdraw it.

Creating a new Persona

To create a new Persona in *CoreMedia Studio*, create a new content item of type `Persona` in the above mentioned folders for global or site specific Personas. Afterwards, you can edit the profile with the graphical user interface.

Adding and removing new dynamic properties

In order to add a dynamic property proceed as follows:

1. Click the **[Choose keyword]** icon.
2. Select a property name from the taxonomy chooser.

   or

   Enter your keyword directly in the "Enter keyword" line.

   or

   Select the *Base settings* tab and enter your property with a value into the *Context Data* field.

In order to remove a dynamic property from the context, click the remove icon.

Adding and removing Commerce User Segments

e-Commerce Blueprint feature

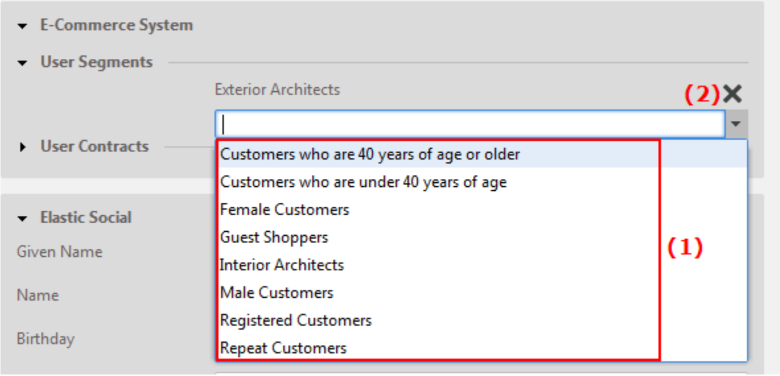


Figure 7.15. Commerce User Segment

In order to add a new User Segment, open the dropdown box and select a new segment from the list (1).

In order to remove a segment, click the x icon behind the existing entry (2).

Adding and removing B2B user contracts

e-Commerce Blueprint feature

For contract based preview of shop pages in *Studio*, you can add contracts to the personas of a B2B enabled site.

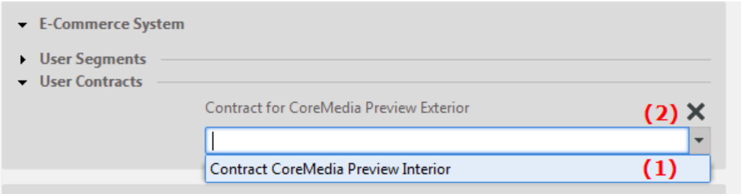


Figure 7.16. B2B user contract

In order to add a new User Contract, open the dropdown box and select a new segment from the list (1).

In order to remove a contract, click the x icon behind the existing entry (2).

Removing a Persona content item

If you want to remove a Persona from the *Persona* selector you can either delete the content item or move it into another folder.

7.5.3 Switching Between Personas

With Personas in place, a previewed content item can be evaluated using the pre-defined set of properties for the selected persona. The dialog option is located in the top right corner of the *Preview* of *CoreMedia Studio*.

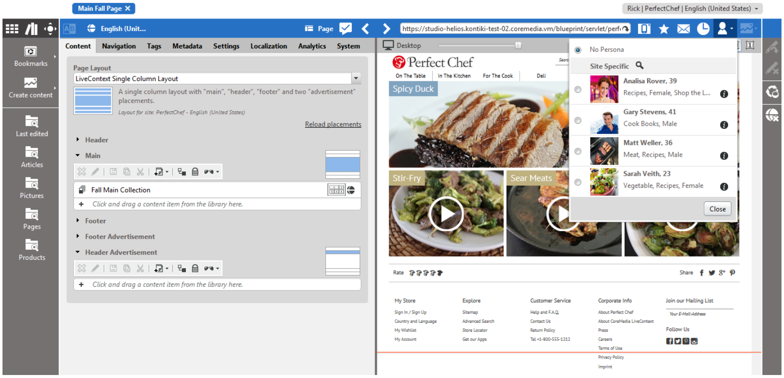


Figure 7.17. Selecting a Persona

7.6 Working with the Context Inspector

You can use the *Context Inspector* to view the context of the current selected persona. To open the *Context Inspector* open the Persona dialog and click the "i" button beside the persona as viewed below.

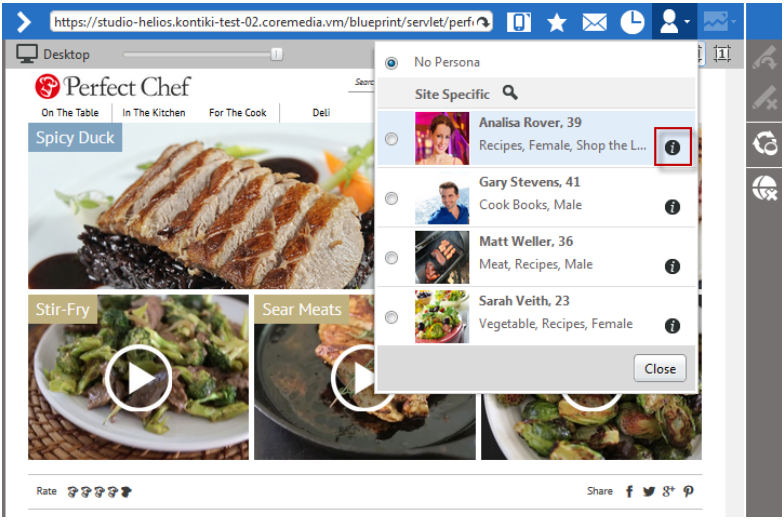


Figure 7.18. Opening the Context Inspector

This opens the *Context Inspector* window as shown below. The context collection of this persona contains different context elements such as *Commerce Segments*, *Implicit Interest*, *Explicit Interest or Personal Information*, but in your project specific setup you might have different contexts. The contexts *segment* and *system* are added to the `ContextCollection` automatically if the corresponding configuration in the web application is correct. The content of the contexts *Implicit Interests* for example is computed from the data configured in the Persona content item of the selected user.

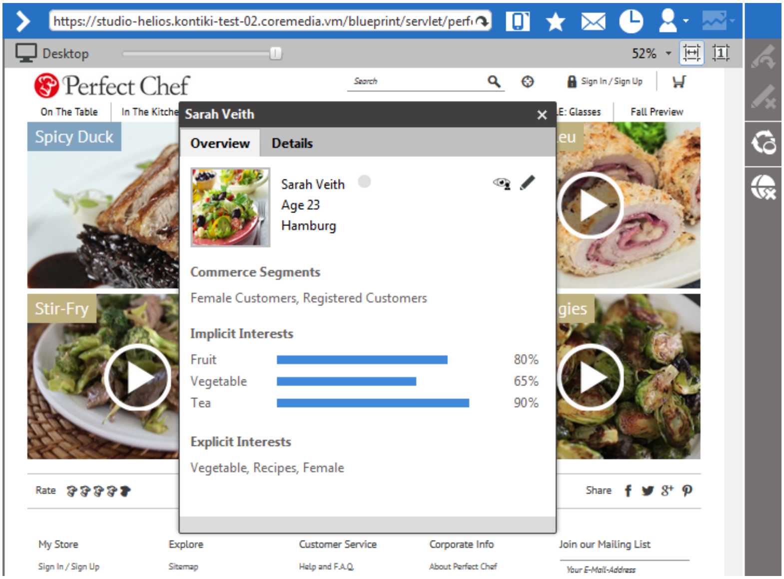


Figure 7.19. Context Inspector showing persona context

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” [287] shows you how to moderate and edit comments.
- Section 8.2, “Working with Users” [299] 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" [287]

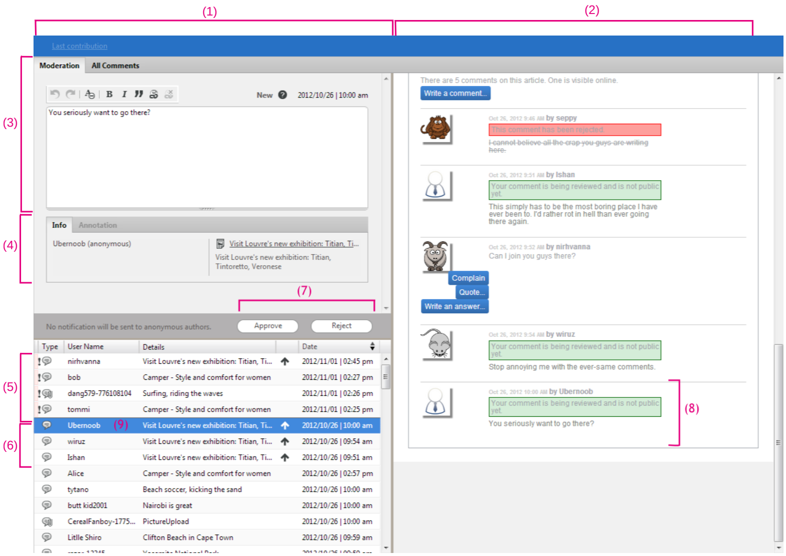


Figure 8.1. Moderation View

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.

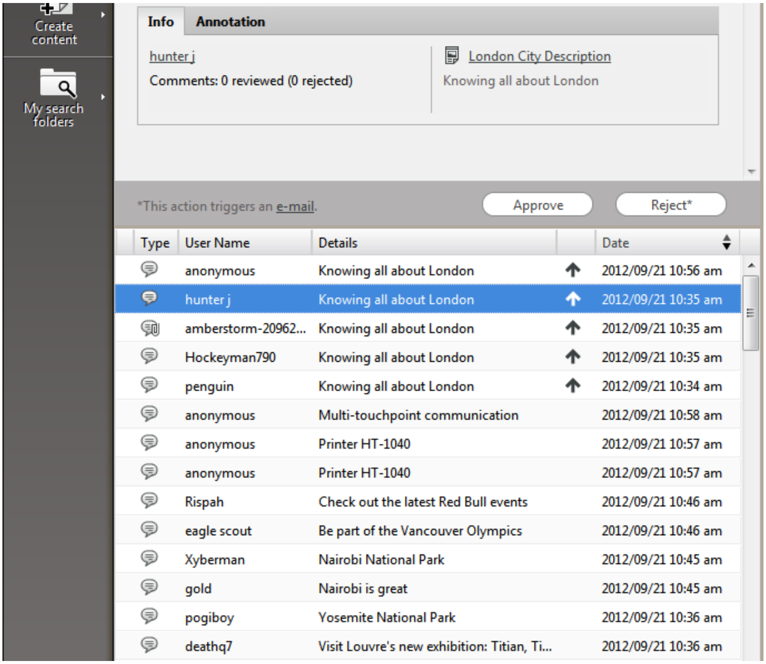


Figure 8.2. Prioritized comments

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” [296] 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, select the **Apps** menu in the Favorites 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” [290]. 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.

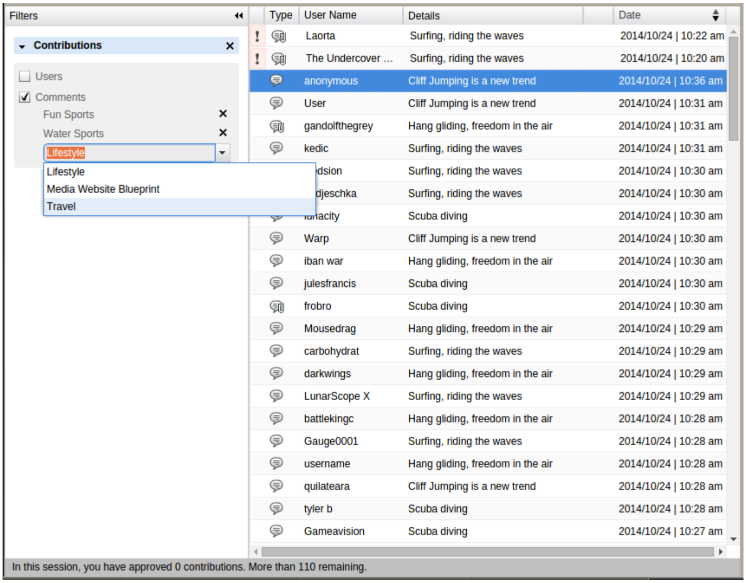


Figure 8.3. Applying filters to the list of comments and users

It is subject to configuration, under which categories a comment falls and which categories are available as filter options. For details, refer to Section 3.2.7, "Configuring Available Comment Categories" [64].

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 restore last comment or user" [291] and follow the instructions from Section 8.2, "Working with Users" [299].

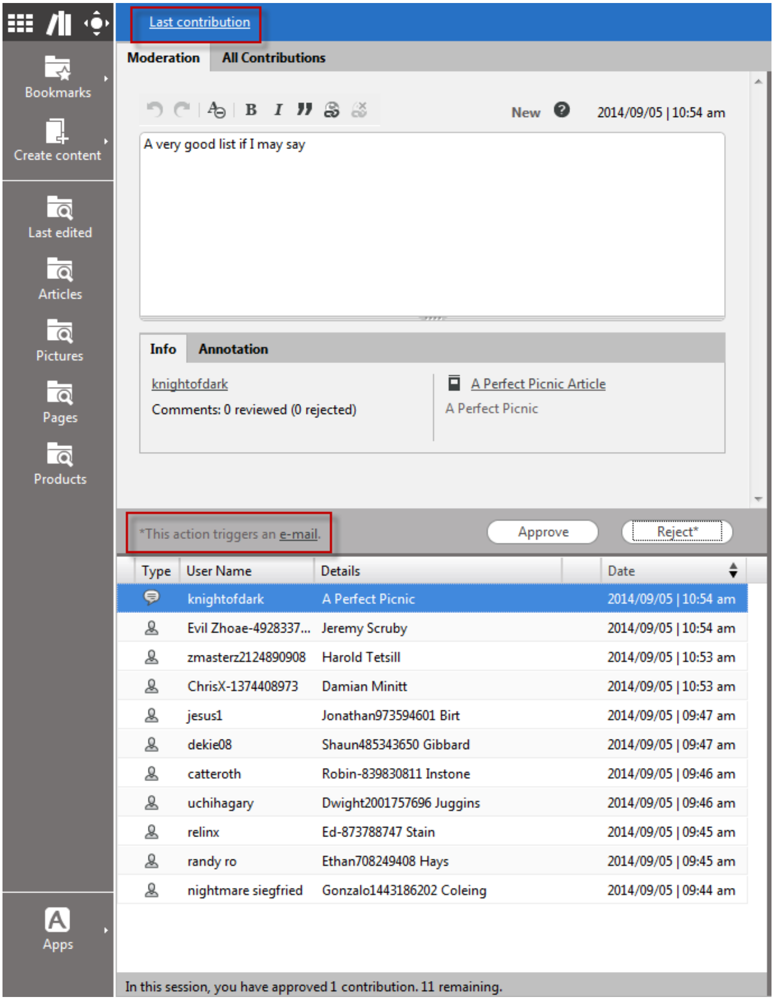


Figure 8.4. Select the email window and restore last comment or user

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 8.4, “Select the email window and restore last comment or user” [291].

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 Blacklist

Elastic Social lets you define a blacklist of suspicious or offending words that is shared between the moderation team. If a comment contains a word from the blacklist, then the word will be highlighted and helps to determine quickly if a comment is unwanted or not.

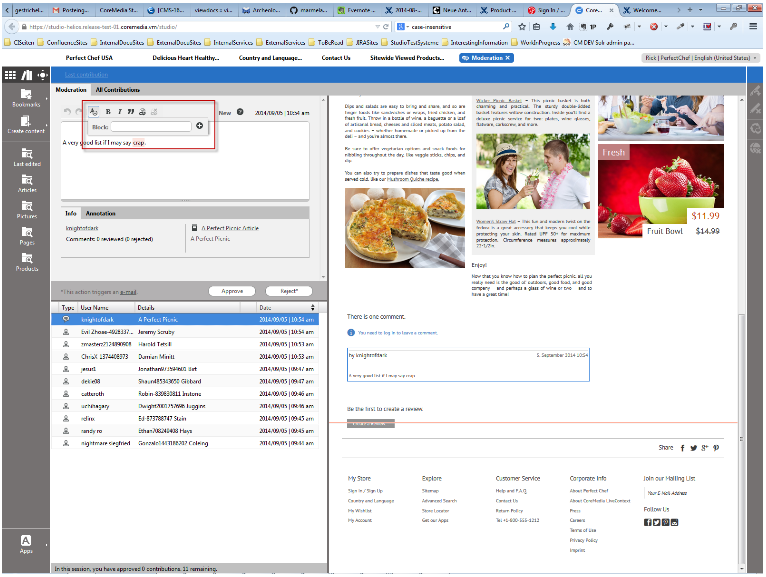


Figure 8.5. Comment with highlighted word from the blacklist

You can add words to and remove words from the blacklist like this:

Adding words to the blacklist

1. Double click or select the word you want to add to the blacklist.
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 blacklist

1. Double click or select the word you want to remove from the blacklist.
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 blacklist icon and directly type in words you want to add or remove.

8.1.7 Opening the Form of the Content

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 8.6, "Open the target content in the Form" [294] shows the link.

The content opens in a separate form like you are used to in *CoreMedia Studio*.

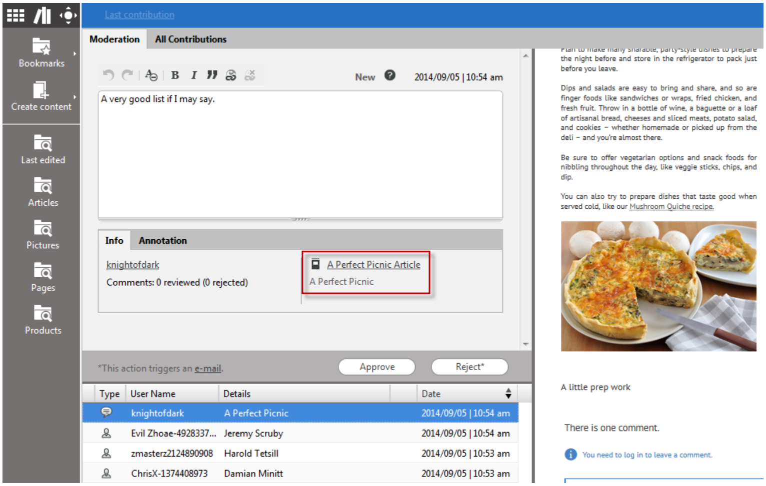


Figure 8.6. Open the target content in the Form

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.

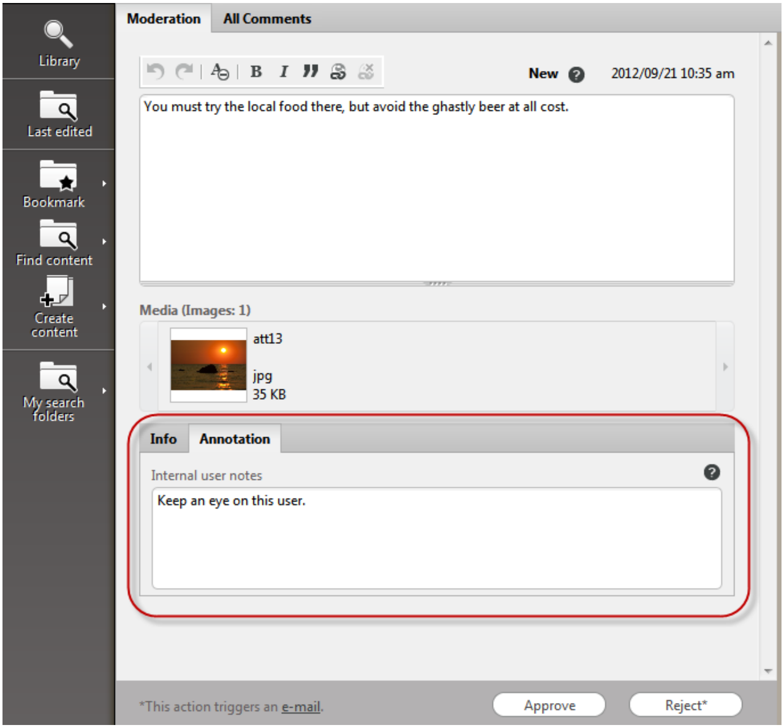


Figure 8.7. The annotation field

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 8.8, "All comments view" [296]). Simply select the *All Comments* tab. The content of a selected comment is shown in the Preview (2).

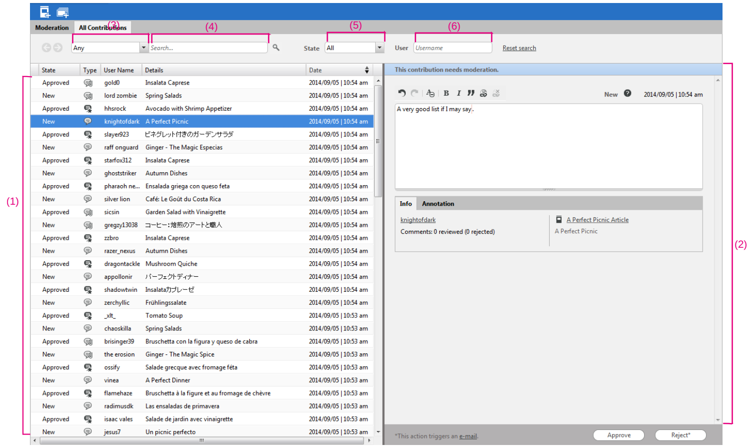


Figure 8.8. All comments view

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") or all comments ("Any").
- Search term (4): Select comments only, that contain a specific word.
- Comment state (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.

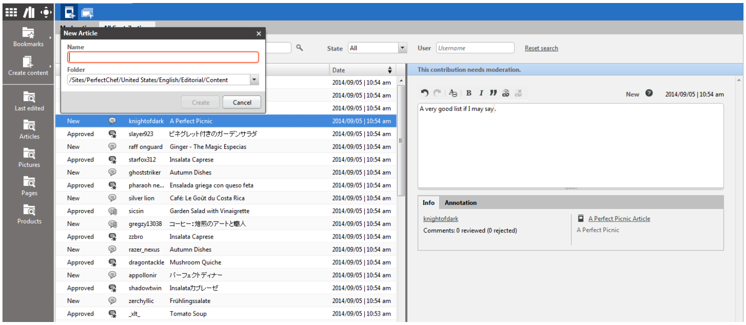


Figure 8.9. Create Article from comments

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.

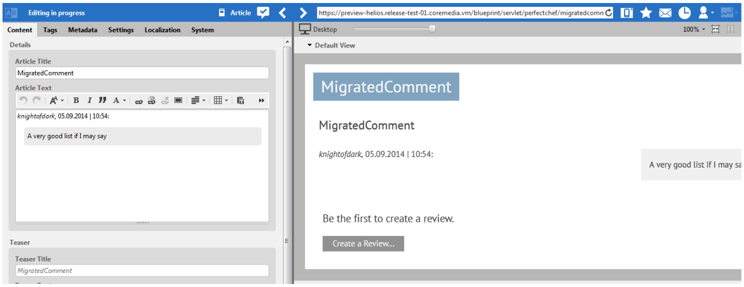


Figure 8.10. Article created from the comment

The new content item is not linked to any Pages.

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 document preview as shown in Figure Figure 8.11, "Comment highlighting in the preview" [298].

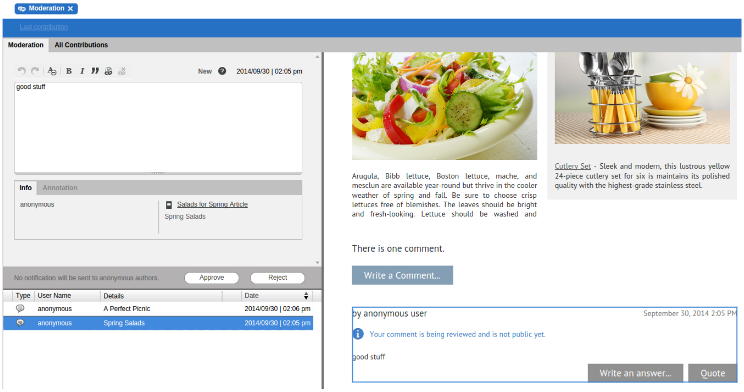


Figure 8.11. Comment highlighting in the preview

Whenever the Studio's preview shows a document with comments, it is possible to open a context menu on a comment via a mouse right-click as shown in Figure Figure 8.12, “Comment highlighting in the preview” [298]. 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*.

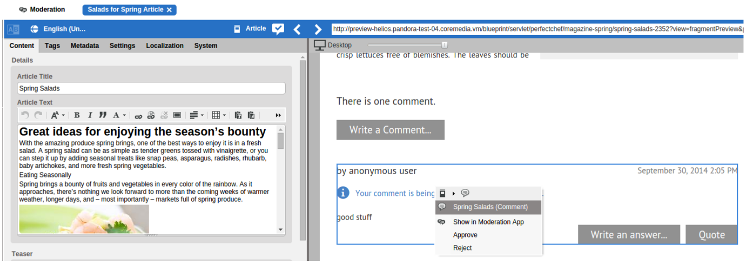


Figure 8.12. Comment highlighting in the preview

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 8.13, "User Profile View" [299] shows the different sections of the *User Profile View*.

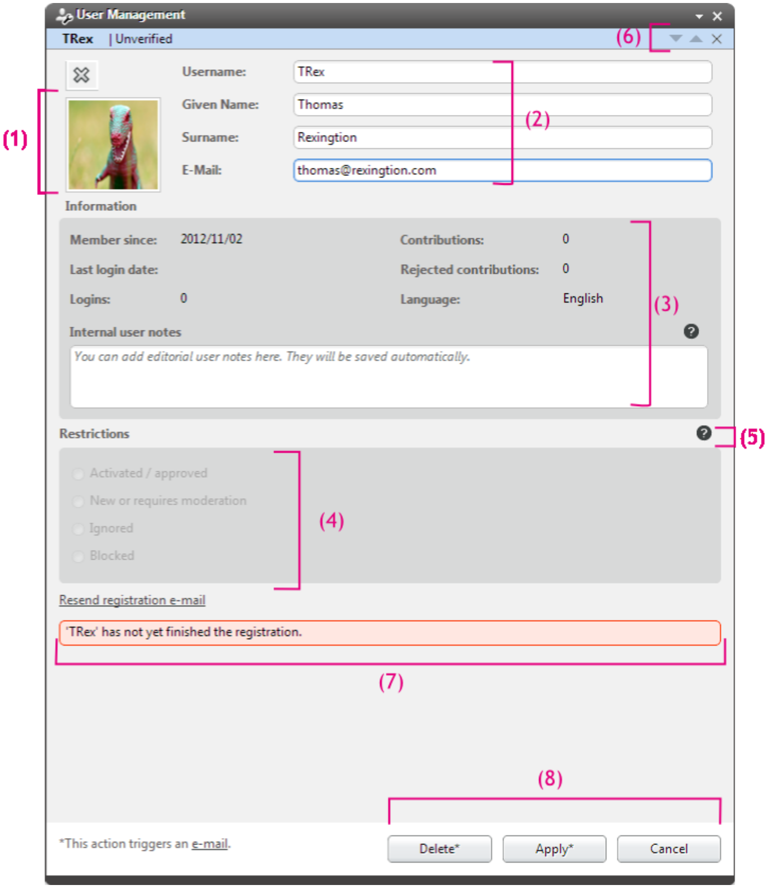


Figure 8.13. User Profile View

→ (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) If users have not finished their registration, you will find a hint here.
- (8) 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.

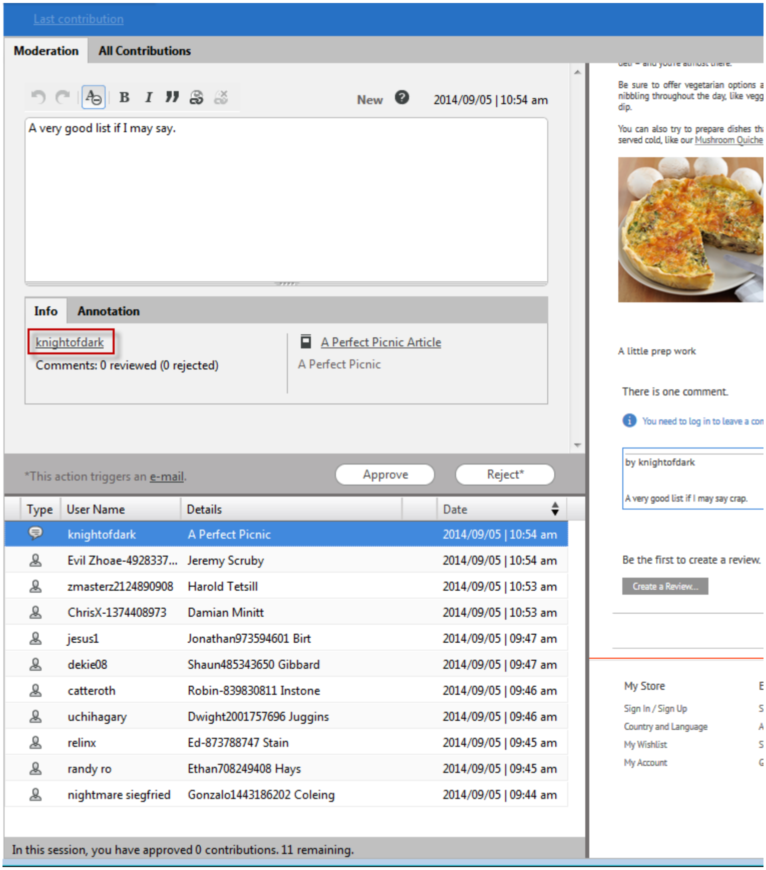


Figure 8.14. Open user profile from the Moderation View

From the User Management

If you want to open the profile of a specific user proceed as follows:

1. Click **[Apps]** in the *Favorites Bar* 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.

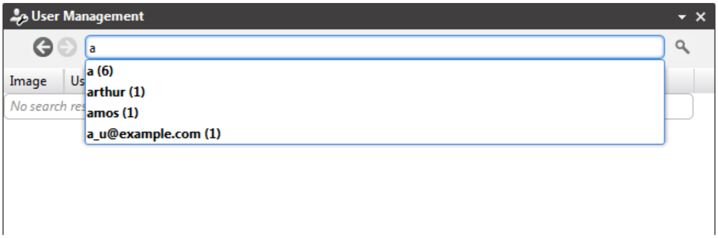


Figure 8.15. Search window with suggestions for your search

3. Select one of the suggestions and press **Enter**.

   The search window shows the results:

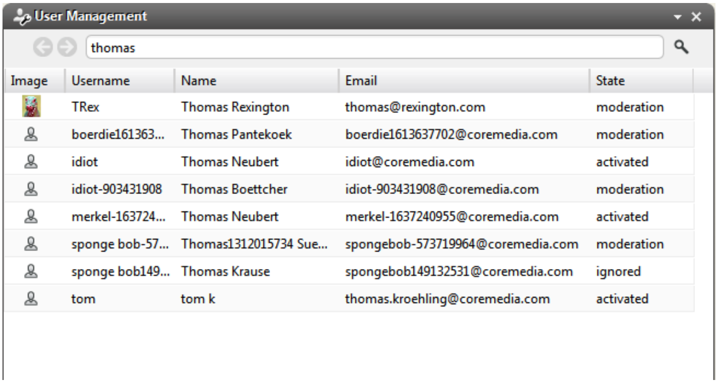


Figure 8.16. Results of the search

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".

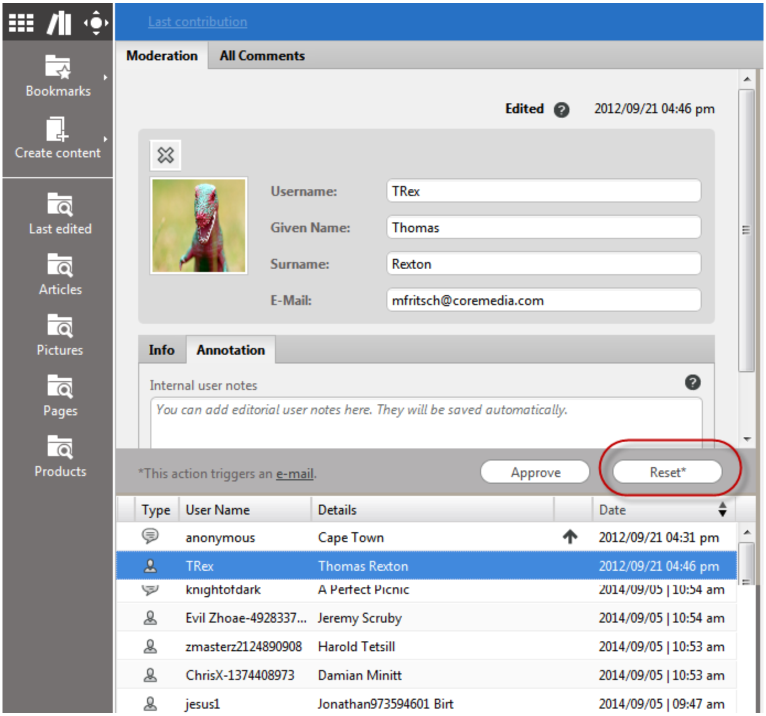


Figure 8.17. Reset the profile

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".

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 3.2.9, “Editing Mail Templates” [66] 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.

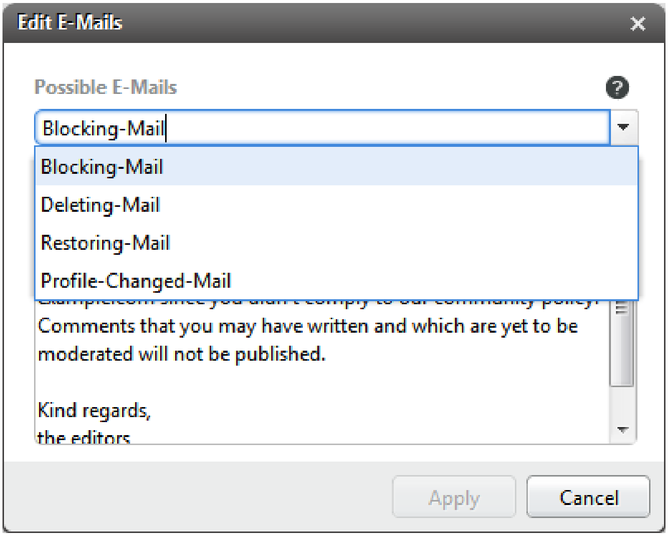


Figure 8.18. Editing the current email

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.

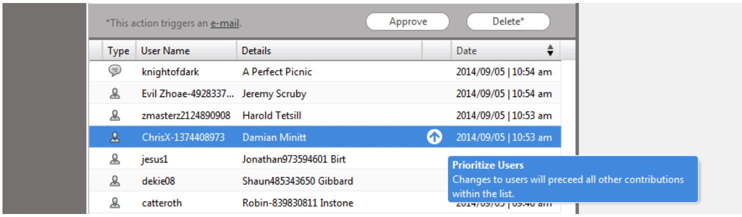


Figure 8.19. Prioritize Users

Prioritize users will prioritize all user profiles and not only the user at which you clicked the **[Prioritize Users]** icon.

9. Appendix

In the appendix you will find the following information:

- Section 9.1, “Content Types” [308] shows you the predefined content types used in *CoreMedia Digital Experience Platform 8*.
- Section 9.2, “Conditions” [312] gives you an introduction into the creation of conditions and lists the predefined conditions in *CoreMedia Digital Experience Platform 8*.
- Section 9.3, “Keyboard Shortcuts” [317] shows the predefined keyboard shortcuts.

9.1 Content Types

This section describes the content types that are part of *CoreMedia Blueprint*. Table 9.1, "Content types of CoreMedia Blueprint" [308] shows all content types that you can use.

Table 9.1. Content types of CoreMedia Blueprint

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.
Analytics Event List	Analytics	
Analytics Page List	Analytics	
Article	Content	In an `Article` you will enter the text content of a website but it may also link to images and related content.
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 *IBM WebSphere Commerce Server Management Center*.
Augmented Category	Commerce	You can use an `Augmented Category` to augment a category from the *IBM WebSphere Commerce Server Management Center* 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.
Document Asset	Asset Management	A `Document Asset` content item contains content 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.

Content Type	Aim	Description
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	Commerce	You can use an `e-Marketing Spot` to include an e-Marketing spot from the *IBM WebSphere Commerce Server 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	
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.
Persona	Personalization	A `Persona` defines the context of a test user for which an editor can preview the site.
Personalized Content	Personalization	`Personalized Content` shows predefined content depending on the context of

Content Type	Aim	Description
		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 Photoshop 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 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.
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	
User Segment	Personalization	A `User Segment` content item
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.

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:

- User Segments
- Personalized Content

In both of them you want to make something happen ("display of a certain content" or "belonging to a user 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' User 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 User Segments and to determine whether to display Personalized Content. The `Segment Condition` can only be used in User 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.

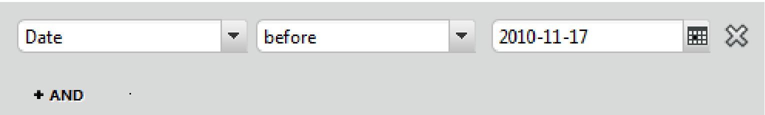


Figure 9.1. Date condition example

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.

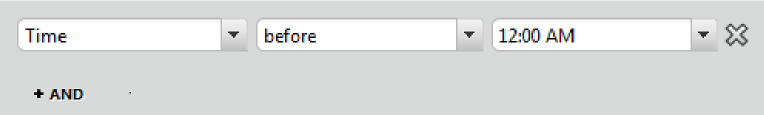


Figure 9.2. Time condition example

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.

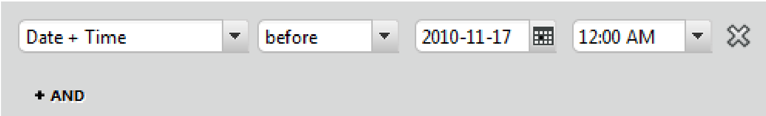


Figure 9.3. Date and time condition example

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.

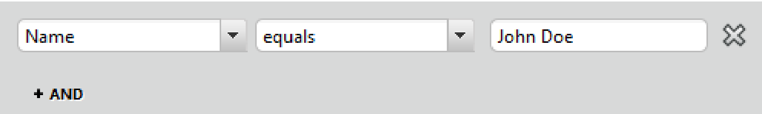


Figure 9.4. String condition example

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.

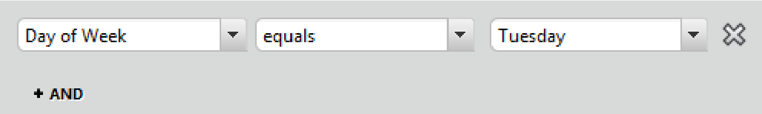


Figure 9.5. `Enum` condition example

Segment Condition

The condition checks whether the current user belongs to a certain user segment. It can only be used in user 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.

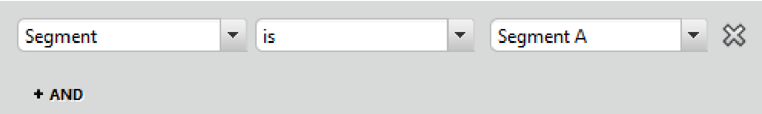


Figure 9.6. Segment condition example

Commerce Segment Condition

FEP7+

The commerce segment personalization is not available when your system is running with IBM WebSphere Commerce (FEP6).

The condition checks whether the current user belongs to a certain commerce segment taken from IBM WebSphere Commerce.

In the second input field you select a comparison operator from the drop down box. You can choose if the commerce segment "contains" the user segment that you select in the third input field.

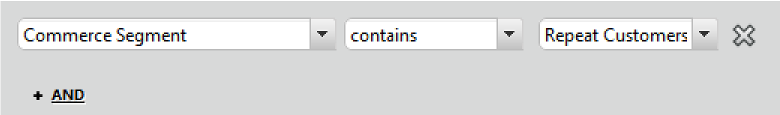


Figure 9.7. Commerce segment condition example

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.

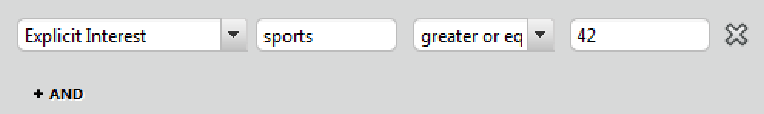


Figure 9.8. Keyword condition example

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!

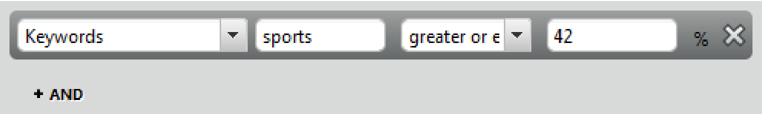


Figure 9.9. Percentage keyword condition example

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.

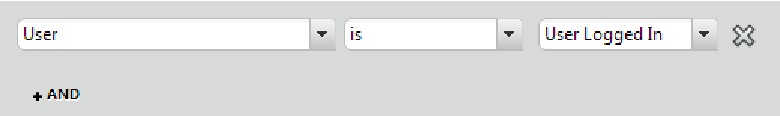


Figure 9.10. Example of a Boolean condition

9.3 Keyboard Shortcuts

CoreMedia Digital Experience Platform 8 has some predefined keyboard shortcuts in order to speed up your work with *Studio*.

Table 9.3. Keyboard shortcuts for CoreMedia Studio

Shortcut	Functionality
Ctrl+C	Copy text
Ctrl+V	Paste text
Ctrl+X	Cut text
F2	Toggles the Dashboard
F3	Toggles the Library
F4	Toggles the Control Room

10. Support

If the *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 3.3, "Getting Technical Information" [67]) 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:

http://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 AG

Ludwig-Erhard-Straße 18

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.

It may contain any of the following modules:

- *CoreMedia Master Live Server*
- *CoreMedia Replication Live Server*
- *CoreMedia Content Application Engine*
- *CoreMedia Search Engine*
- *Elastic Social*
- *CoreMedia Adaptive 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:

- *CoreMedia Content Management Server*
- *CoreMedia Workflow Server*
- *CoreMedia Importer*

- *CoreMedia Site Manager*
- *CoreMedia Studio*
- *CoreMedia Search Engine*
- *CoreMedia Adaptive Personalization*
- *CoreMedia CMS for SAP Netweaver ® Portal*
- *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: *Content Servers* are web applications running in a servlet container. → *Content Management Server* → *Master Live Server* → *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, ...
CoreMedia Studio	*CoreMedia Studio* is the working environment for business specialists. Its functionality covers all of the stages in a web-based editing process, from content creation and management to preview, test 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.
Dead Link	A link, whose target does not exists.
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-Site 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	A project is a collection of content items in CoreMedia CMS created by a specific user. A project can be managed as a unit, published or put in a workflow, for example.
Property	In relation to CoreMedia, properties have two different meanings: 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 items depends on the content type.

	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. 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	Swing component of CoreMedia for editing content items, managing users and workflows.
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.
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. Caution! Weak links may cause dead links in the live environment.

WebDAV	WebDAV stands for World Wide Web Distributed Authoring and Versioning Protocol. It is an extension of the Hypertext Transfer Protocol (HTTP), which offers a standardised method for the distributed work on different data via the internet. This adds the possibility to the CoreMedia system to easily access CoreMedia resources via external programs. A WebDAV enabled application like Microsoft Word is thus able to open Word documents stored in the CoreMedia system. For further information, see http://www.webdav.org.
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 and global-search-and-replace 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.

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