Oracle® WebCenter Content

User's Guide for Content Server

11g Release 1 (11.1.1)

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This user's guide describes how to use Oracle WebCenter Content Server, including how to manage and revise content, how to use security and content metadata, how to search for content, how to organize content into folders and folios, how to use workflows, and how to use images and videos.

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Oracle WebCenter Content User's Guide for Content Server, 11g Release 1 (11.1.1)

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Contents

7 Working with Workflows

8 Managing Content with Folders and WebDAV

9 Grouping Content with Folios

10 Using Images and Videos

A User Interface

Preface

This user's guide provides concepts, procedures, and reference information for end users of Oracle WebCenter Content Server.

Audience

This document is intended for end users of the Oracle WebCenter Content Server system. It is also a valuable resource for system administrators who manage a Oracle WebCenter Content Server instance.

Documentation Accessibility

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Related Documents

Oracle WebCenter Content Server is documented in the following manuals:

- *Oracle WebCenter Content Concepts Guide*
- *Oracle WebCenter Content Quick Installation Guide*
- *Oracle WebCenter Content Installation Guide*
- *Oracle WebCenter Content User's Guide for Content Server* (this manual)
- *Oracle WebCenter Content Application Administrator's Guide for Content Server*
- *Oracle WebCenter Content System Administrator's Guide for Content Server*
- *Oracle WebCenter Content Developer's Guide for Content Server*
- *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*

See your system administrator for details about the documentation available to you.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
Forward slashes (/)	Forward slashes are used to separate the directory levels in a path to a UNIX server, directory, or file. Forward slashes are also used to separate parts of an Internet address. A forward slash is always included after a UNIX directory name and may or may not be included after an Internet address.
Backward slashes (\)	Backward slashes are used to separate the levels in a path to a Windows server, directory, or file. A backward slash is always included after a Windows server, directory, or file path.

1

Introduction

This chapter provides overview information about Oracle WebCenter Content Server including to manage and revise content, how to use security and content metadata, how to search for content, how to organize content into folders and folios, how to use workflows, and how to use images and videos.

The next section provides links to these and other topics.

1.1 Overview

This chapter describes content management concepts and provides an overview of system functionality. It contains the following topics:

- Section 1.1, "Overview" (this section)
- Section 1.2, "Content Server"
- Section 1.3, "Content Repository"
- Section 1.4, "Revision Control"
- Section 1.5, "Metadata"
- Section 1.6, "Users"
- Section 1.7, "Security Groups and Accounts"
- Section 1.8, "Roles"
- Section 1.9, "Permissions"
- Section 1.10, "Access Control List (ACL) Security"
- Section 1.11, "Conversion Features"
- Section 1.12, "Indexing"
- Section 1.13, "Finding Content"
- Section 1.14, "Managing Images and Videos"
- Section 1.15, "Managing Content with Folders and WebDAV"
- Section 1.16, "Grouping Content into Folios"
- Section 1.17, "Routing Content Through Workflows"

> **Note:** This user guide describes the standard Web pages and procedures that come with the "out-of-the-box" Content Server. Your system administrator can customize Content Server, so your Content Server Web pages may look different from those in this guide.

1.2 Content Server

Oracle WebCenter Content Server is an automated system for sharing, managing, and distributing business information using a Web site as a common access point. You can access current information quickly and securely from any standard Web browser. You can manage virtually any type of content, including letters, reports, engineering drawings, spreadsheets, manuals, sales literature, and more, in one powerful content management system.

In addition to the Web page interface, Content Server provides alternative desktop and WebDAV interfaces that allow users to perform primary content management actions from their desktop using folders and files to represent content items. For more information, see Section 1.15, "Managing Content with Folders and WebDAV."

1.3 Content Repository

When you check in a file, Content Server stores the original, or *native*, file in a central repository for native files. If your system has conversion features installed and enabled, a *Web-viewable* version of the file (such as PDF) is created and stored in a special repository for Web-viewable files. If you are not using conversion, or if a particular file type cannot be converted, a copy of the native file is placed in the repository for Web-viewable files.)

A file that you check in to Content Server is called a *content item*. Any user with the correct security permissions can view the Web-viewable version of a content item or get a copy of the original file from the repository of native files. Security permissions determine who can view, revise, and delete a particular content item. For more information, see Section 1.7, "Security Groups and Accounts."

The native file and any Web-viewable files associated with a content item are called *renditions*. For example, the PDF version of a content item is a rendition of that content item, as are the HTML and XML versions.

1.4 Revision Control

To change a file that is checked in to Content Server, you must check the content item out of the file repository. Only one person can have a content item checked out at any given time, but others can view the released version of the file.

When you check the modified file back into Content Server, Content Server automatically stores the file as a new *revision* of the content item. You can view or copy previous revisions, but the latest revision is displayed by default by Content Server.

Every content item in the repository for Web-viewable files has a *persistent URL* that does not change from one revision to the next. The most current version is always displayed when you point your browser to the URL of a content item.

1.5 Metadata

Metadata is information about a content item, such as the title, author, release date, and so on. You can use metadata to find content items in Content Server, much as you would search for books in a library by author or subject. When you check in a content item, you assign some metadata values, while Content Server assigns some metadata values automatically. The metadata is stored in a database that works with Content Server.

To simplify metadata entry and selection, your system administrator can create *Profiles* that specify which metadata values are displayed when you check in, search for, or view content information. You can select the profile to use from either the Search or New Check-in menus on the Toolbar. For more information, see Chapter 3, "Searching for Content Items."

Important: It is important that you understand your organization's metadata fields and always assign metadata carefully. Proper metadata makes content items easier to find, and ensures that only users who have the proper permissions can access a content item.

1.6 Users

Content Server defines two types of users:

- **Consumers:** These are users who find, view, and print files from the content repository. They do not have permission to create, modify, or delete files.
- **Contributors:** These are users who create and revise files in the content repository. They also have permission to find, view, and print files.

In many Oracle WebCenter Content Server systems, the majority of users are consumers. To safeguard the integrity of files in the system, contributors must have a user name and password to check content items in to or out of the content repository.

Note: As of 11g Release 1 (11.1.1), user logins are managed with the Oracle WebLogic Server Administration Console. Although an administer can manage user logins in Content Server for special purposes, the logins are not valid for authentication to Content Server until they are created with the Oracle WebLogic Server Administration Console.

Users who have full administrative permissions are referred to as *system administrators*. Your organization may also assign limited administrative permission, such as the ability to set up user logins and create workflow templates, to certain users. These users are referred to as *subadministrators*.

1.7 Security Groups and Accounts

Content Server provides security to control which users can view, edit, and delete particular content items. Guest users typically have permission to view unsecured (public) content. Contributors typically must log in to Content Server to check in and check out files. Consumers who have access to secured files typically must also log on to Content Server to view the secured content.

When you check in a file, you may have to specify a value for the following security-related metadata fields:

- **Security group:** All users belong to one or more security groups. They also have a specific level of access within each security group. The security group is a required metadata field for all content items and may be assigned by default. Only the users who have permission to that security group can work with the content item.
- **Account:** Accounts are an optional feature that your system administrator can use to define a more flexible security model. As with security groups, only users who have permission to a particular account can work with content items that belong to that account.

1.8 Roles

A role is a set of permissions (Read, Write, Delete, Admin). For example, as a team member, you can view a schedule (Read access), but as the team leader, you may also have to update the schedule (Read and Write access).

The system administrator assigns roles to users to define their level of access within a security group. The following roles are predefined on Content Server. Your system administrator can define additional roles.

Roles	Description
contributor	The *contributor* role has Read and Write permission to the Public security group. Users can search for, view, check in, and check out content.
guest	The *guest* role has Read permission to the Public security group. Users can search for and view content in the Public security group.
sysmanager	The *sysmanager* role has privileges to access the Admin Server on Content Server.

1.9 Permissions

Each role can have the following permissions for each security group: Read (R), Write (W), Delete (D), or Admin (A). The permissions for a security group are the highest permission defined by any of the roles *for that group*. For example, if you are assigned Guest and Contributor roles, where guest is given Read permission and Contributor is given Write permission to the Public security group, you have Write permission to content in the Public security group.

Each role can have the following permissions for each security group:

Permissions	Description
read	The user can view files in that security group.
write	The user can view, check in, check out, and get a copy of documents in that security group. Non-authors can change the security group setting of a document if the non-author has admin permission in the new security group.
delete	The user can view, check in, check out, get a copy, and delete files in that security group.

Permissions	Description
admin	The user can view, check in, check out, get a copy, and delete files in that security group. If this user has Workflow rights, they can start or edit a workflow in that security group. The user can also check in documents in that security group with another user specified as the Author.

1.10 Access Control List (ACL) Security

In addition to the standard Content Server roles, security groups, and accounts, Content Server can be configured to support access control lists (ACL). An access control list is a list of users, groups, or enterprise roles with permission to access or interact with a particular content item.

Depending on how access control list security is configured, three new fields are available for use when adding, modifying, or searching for content items:

- **User Access List**
- **Group Access List**
- **Role Access List**

To use access control lists with content items, you assign one or more predefined users, groups, or roles to the item. In addition, you assign the permissions (Read (R), Write (W), Delete (D), or Admin (A)) to each of the access list entries you specify.

For example, suppose you add a content item and you want guests to have read access and you want all logged-in users to have read and write access. First, add the *guest* role to the content item and click the **R** (Read) permission icon. Then, add the *authenticated* user role to the content item and click the **W** (Write) permission icon to grant both the read and write permissions.

If either role is valid for the user, they have the access specified for the valid role. If both roles are valid for the user, they have the greater of the two permission sets.

Between access control list entries (user, group, and role), there is an implicit OR relationship. Between access control list entries and other security methods (security groups and accounts), there is an implicit AND relationship, where the user has access equal to the intersection of the valid permission sets.

Note: The Access Control List metadata associated with a content item can include multiple entries and permissions. When searching for content using Access Control List metadata, use the "Contains" or the "Substring" option (depending on your search engine) to help ensure that you find all instances of the specified metadata.

1.11 Conversion Features

The Web-viewable formats of a file depend on the original file format of the content item and the installed conversion features. For example, your system could be set up to convert Microsoft Word documents to the PDF format using the PDF Converter, and to the HTML format using the Dynamic Converter. Most conversions take place automatically as soon as you check in a file.

Some file formats cannot be converted, or your system administrator may configure the system to *pass through* certain types of documents without conversion. For example, a compressed ZIP file cannot be converted to a Web-viewable format. In these cases, the repository contains a copy of the native file for Web-viewable files.

1.12 Indexing

If your system is configured for full-text search, the indexing engine makes a list of all the words in every file in HTML, PDF, TXT, XML, and other supported formats, and stores the list in a database. After the indexing process completes, the file is released to Content Server.

When you do a full-text search for content, Content Server looks up your search terms in this index.

1.13 Finding Content

You can search for a content item by its metadata, by full-text, or by a combination of the two. Only the content items you have permission to view are displayed in the search results.

You can specify search terms for one or more metadata fields. Depending on how your system is configured, you can use search operators that specify if the search term is a whole word or part of a word, or if it appears at the start or the end of the field. You can also use wildcard characters to match one more characters in a search term.

To simplify or customize the search form, an administrator can create one or more metadata *Profiles* that specify the metadata fields that are included on the form.

With the Quick Search function, you can search at any time from the home page. You can specify a search term for a selected field or for all supported fields. If your system is configured for full-text search, Quick Search also searches for the search term in the text of content items.

For more information, see Chapter 3, "Searching for Content Items."

1.14 Managing Images and Videos

You can use Digital Asset Manager functionality to quickly find, group, convert, and download images and videos of various sizes, formats, and resolutions to meet your business needs, all while maintaining a consistency of use across your organization. For example, an organization's logo can be available in a variety of sizes for advertisements, Web pages, and presentation, or a company training video can be available in a variety of formats for streaming on an intranet, presenting to an audience, or copying to tape.

For more information, see Chapter 10, "Using Images and Videos."

1.15 Managing Content with Folders and WebDAV

Content Server includes components that provide a hierarchical folder interface, similar to a conventional file system, for organizing and managing some or all of the content in the repository.

- Folders: This component (FrameworkFolders component) provides a hierarchical folder interface within the browser, similar to a conventional file system, for organizing, locating, and managing repository content and content item metadata. The Folders functionality is installed but disabled by default. Folders is a scalable, enterprise solution and is intended to replace the earlier Contribution Folder interface.

- Contribution Folders: This optional component (Folders_g component) provides a hierarchical folder interface within the browser, similar to a conventional file system, for organizing repository content. The component is installed but disabled by default. The newer, Folders component is meant to be a replacement for Contribution Folders.
- WebDAV (Web-Based Distributed Authoring and Versioning): Both folder components work with Content Server's built-in WebDAV functionality to allow users to remotely manage and author content using clients that support the WebDAV protocol. The WebDAV interface provides a subset of the options available through the browser interface. In general, you can create, delete, move, and copy both folders and content items, and you can modify and check in content items. To check out content items through the WebDAV interface, you must use a WebDAV client that can open the file. To perform other management tasks, such as specifying or propagating metadata values, you must use the standard browser interface.

For more information, see Chapter 8, "Managing Content with Folders and WebDAV."

Oracle also offers Oracle WebCenter Content: Desktop, which can enhance the WebDAV client environment by more closely integrating with Windows Explorer, Microsoft Outlook, Lotus Notes, and other applications. For more information see the *Oracle WebCenter User's Guide for Desktop*.

1.16 Grouping Content into Folios

A *folio* is a logical grouping or framework to organize content stored in Content Server. Folios are useful when you want to organize groups of documents, such as contracts or sales information, that include some common components and some unique components, and assemble them in a standardized sequence and hierarchy. Folios are also useful when you want to create and review a group of documents as part of one or more workflow processes.

With a *simple folio*, you collect one or more items in a single level. With an *advanced folio*, you can organize content in a hierarchy of folders.

An advanced folio can contain folders, called nodes, placeholders for content, called slots, and content items These elements are displayed by default in a hierarchical structure, similar to a standard file system.

For more information, see Chapter 9, "Grouping Content with Folios."

1.17 Routing Content Through Workflows

The workflow process routes a file for review and approval before it is released to the Content Server repository. Users are notified by e-mail when they have a file to review.

You can optionally sign and approve a file with an electronic signature which uniquely identifies the contents of the file at a particular revision and associates the signature with a particular reviewer.

You can create two types of workflows in Content Server:

- In a *criteria* workflow, files automatically go into a workflow if the values entered in the metadata fields upon check-in meet certain criteria. Criteria workflows are useful for individual content items that are approved by the same reviewers on a regular basis (newsletter articles, for example).

- In a *basic* workflow, files are specifically identified in the workflow, along with the contributors, reviewers, and steps. This type of workflow requires an administrator to initiate the process, and is best suited for groups of content items that go through a workflow or individual content items with unique workflow requirements.

For more information, see Chapter 7, "Working with Workflows."

2 Getting Started

Oracle WebCenter Content Server provides a simple interface using standard Web applications and common navigational tools to provide access to the tasks necessary to find and contribute content.

This chapter provides an overview of the standard Content Server Web pages and describes how to use and customize the navigation features of the interface in the following topics:

- Section 2.1, "Using a Supported Web Browser"
- Section 2.2, "Accessing Content Server"
- Section 2.3, "User Interface"
- Section 2.4, "Personalizing the Interface"

2.1 Using a Supported Web Browser

Consumers and contributors access Content Server from a standard Web browser. The computer you use to access Content Server is a *client computer*. You can access Content Server on a supported client computer from a Web browser listed in Table 2–1.

Table 2–1 Supported Web Browsers

Browser	Versions
Internet Explorer	7.0 or higher
Firefox	3.5 or higher
Safari	4.0 or higher
Google Chrome	10.0 or higher

Note: If you are using Firefox, set Firefox to open links in a new window instead of a new tab. In some cases, help pages opened in a new tab are not viewable until the applet that launched the help closes. Opening the help in a separate window makes it viewable while the applet that launched the help runs.

2.2 Accessing Content Server

To access Content Server, enter its Web address (Uniform Resource Locater or URL) in a supported browser and log in. The URL specifies the host name and port number for Oracle WebCenter Content Server.

The host name is the name of the computer that is running the Oracle WebCenter Content Managed Server. The default port number for Content Server is `16200`.

To access Content Server:

1. Browse to your Content Server instance with a Web URL in this format:

   `http://`*`host_name`*`:`*`port_number`*`/cs/`

   For example:

   `http://example.com:16200/cs/`

2. On the Content Server home page, click **Login**.
3. Enter your user name and password, and click **Sign In**.

   Your Content Server home page opens. For information about this page, see Section 2.3.1, "Home Page."

2.3 User Interface

The Content Server interface is very configurable, so your content server Web pages might look different than those described throughout this guide. For example, you may see special colors, icons, and logos, or your system administrator may choose to add, change, or hide functions on certain pages. For user documentation specific to your content server system, contact your system administrator.

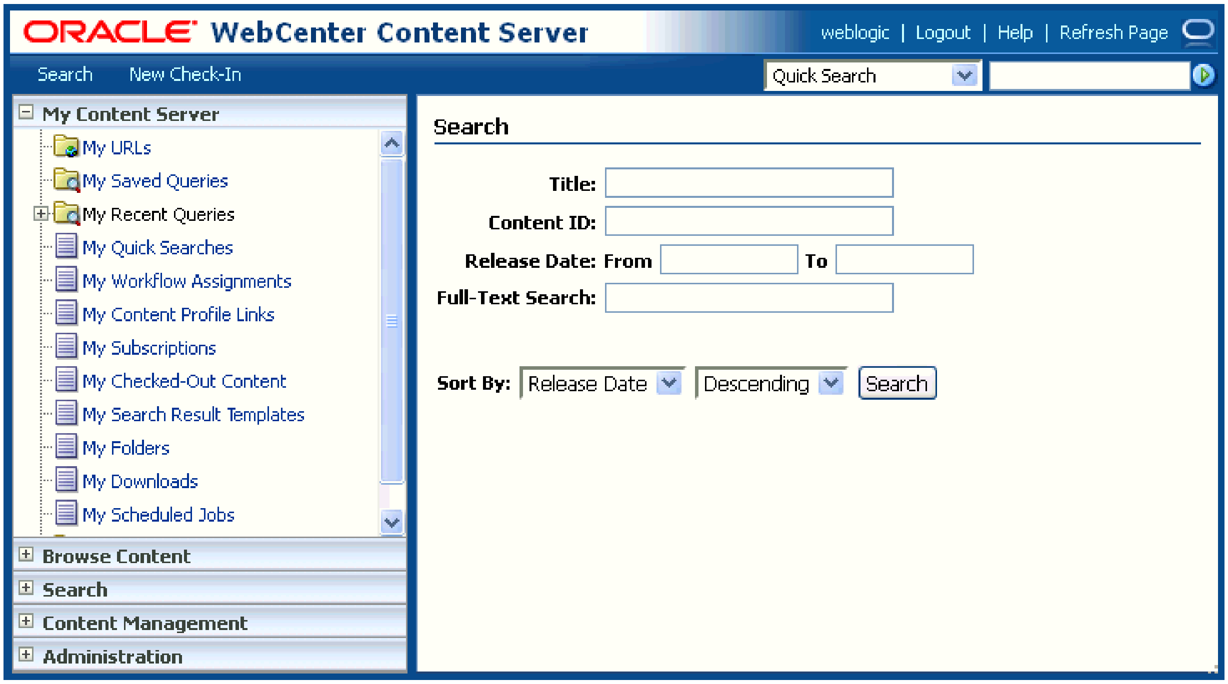
Note: This documentation assumes that you are using the default Trays layout.

This section covers the following topics:

- Section 2.3.1, "Home Page"
- Section 2.3.2, "Trays"
- Section 2.3.3, "Toolbar"
- Section 2.3.4, "Actions Menus"
- Section 2.3.5, "Pop-Up Calendar"

2.3.1 Home Page

The home page opens when you first log in. The home page typically includes the navigation tray, the top toolbar, and other page content and functions as determined by your system administrator. To return to the home page at any time, click the **Content Server** link in the upper left.



If you set up a default saved query, the results are displayed on this page (you may have to scroll down to view them).

2.3.2 Trays

The trays on the left side of Content Server Web pages provide quick access to most of the functional areas in Content Server. You can add functions you use often, such as predefined searches and links to your favorite Web sites.

Note: Trays are part of the frame-based Trays layout option, and are the default navigation tool for Content Server. If you select Top Menus on the User Profile page, you can access Content Server functionality from a series of menus located above the main content area. For more information, see Section 2.4.2, "User Profile Page."

Link	Description
Microsoft Login	If you are logged in to your Microsoft network, click this link to log in to Content Server. This link is present only if your organization is using Microsoft Network security to log in to Content Server. Many browsers, such as Mozilla Firefox, support logging in with this security. Your Content Server instance may be integrated with your enterprise login system. For more information, ask your system administrator.
My Content Server	Expands to display URLs and queries you have saved, content you have checked out, open workflow assignments, available metadata profiles, personal folders, and so on. For more information, see Section A.1.4, "My Content Server Tray."

Link	Description
Browse Content	Expands to display a hierarchy folders. You can expand and collapse the levels of folders in the tray and click on a folder to show the content of the folder in the work area. For more information, see Section 8.2, "Working with Folders."
Search	Displays the Search tray. From this page, you can perform metadata and full-text searches to find specific files. For more information, see Chapter 3, "Searching for Content Items."
Content Management	Displays the Content Management tray with options to view content items that are checked out or expired, or that are active in workflow. For more information, see Section A.1.5, "Content Management Tray."

2.3.3 Toolbar

The toolbar at the top of Content Server Web pages contains navigation links, online help, and the Quick Search feature.

> **Note:** The Search and New Check-In links may list multiple options if your system administrator creates and enables Content Profiles to provide alternative metadata forms. For more information, see Section 5.6.2, "Content Profiles."

Link	Description
Content Server	Displays the Home Page.
Search	Displays the Advanced Search Page, which you can use to perform metadata and full-text searches to find specific files. For more information about searching for content, see Chapter 3, "Searching for Content Items."
New Check In	Displays the Content Check-In Form, which you can use to check new files into Content Server. For more information about checking in content, see Chapter 5, "Checking In Files."
<user_name> profile link	Displays the User Profile Page and provides information for Editing Your User Profile. The link is either a user name or the user's full name.
Logout	Logs out of Content Server. This option is available only if the optional ExtranetLook component is installed.
Help	Displays the online help system.
Refresh Page	Updates the current page.
Quick Search	Searches for the specified term in the supported metadata fields and in the content item text if supported by your system. For more information, see Section 3.1.1, "Quick Search Field."

2.3.4 Actions Menus

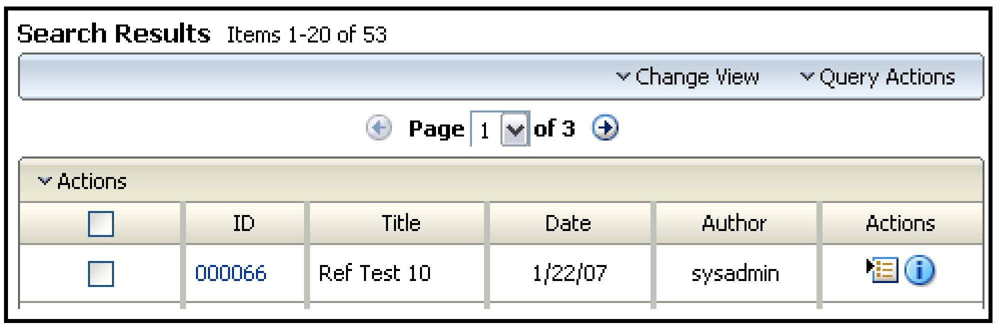
There are three types of actions menus:

- Section 2.3.4.1, "Page Action Menus"
- Section 2.3.4.2, "Table Action Menus"
- Section 2.3.4.3, "Item Action Menus"

2.3.4.1 Page Action Menus

Page action menus are below the page heading and list options that apply to the entire page. A page can have multiple actions menus. For example, on a search results page the **Change View** menu lists options for changing the view of the search results, and the **Query Actions** menu lists options for searching within the existing search and saving it.

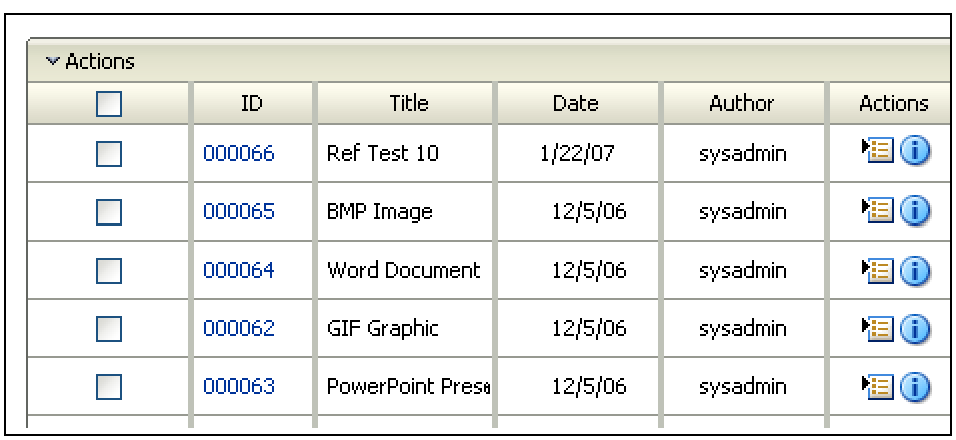
Figure 2–1 Page Action Menus from a Search Result



2.3.4.2 Table Action Menus

Table action menus are displayed above a table of content items, and the menus list options that you can apply to multiple items selected in the table. For example, if the Upload Files Window or Download Files Window is available, you can select multiple items from a search result list and use the table **Actions** menu to download them.

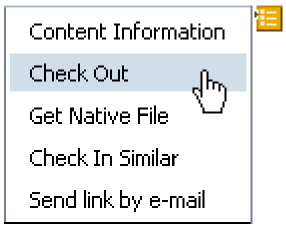
Figure 2–2 Table Actions Menu When Download Applet Is Enabled



2.3.4.3 Item Action Menus

These menus expand from the contextual menu in the Actions column next to a content item and list actions that pertain only to the associated content item. For example, among the options in the **Actions** menu for an item in a search result are links to check out the item and to view the item's content information.

Figure 2–3 Item Actions Menu from a Search Result



2.3.5 Pop-Up Calendar

Although you can enter dates directly, the calendar eliminates format and typographical errors because the date field is automatically populated with the date you select. Click the calendar icon to the right of any editable date field to open the Pop-Up Calendar.

Use the arrow keys to move to the next or previous month, or click the name of the month to select a specific month and year. To select a date from the calendar, click the date. The associated date field shows the selected date in the format specified for the user locale.

Note: The user locale setting determines the date format. For information about user locale, see Section 2.4.3, "Editing Your User Profile."

2.4 Personalizing the Interface

This section covers the following topics:

- Section 2.4.1, "About Personalization"
- Section 2.4.2, "User Profile Page"
- Section 2.4.3, "Editing Your User Profile"
- Section 2.4.4, "Editing Saved Queries"
- Section 2.4.5, "Saving Personal URLs"

2.4.1 About Personalization

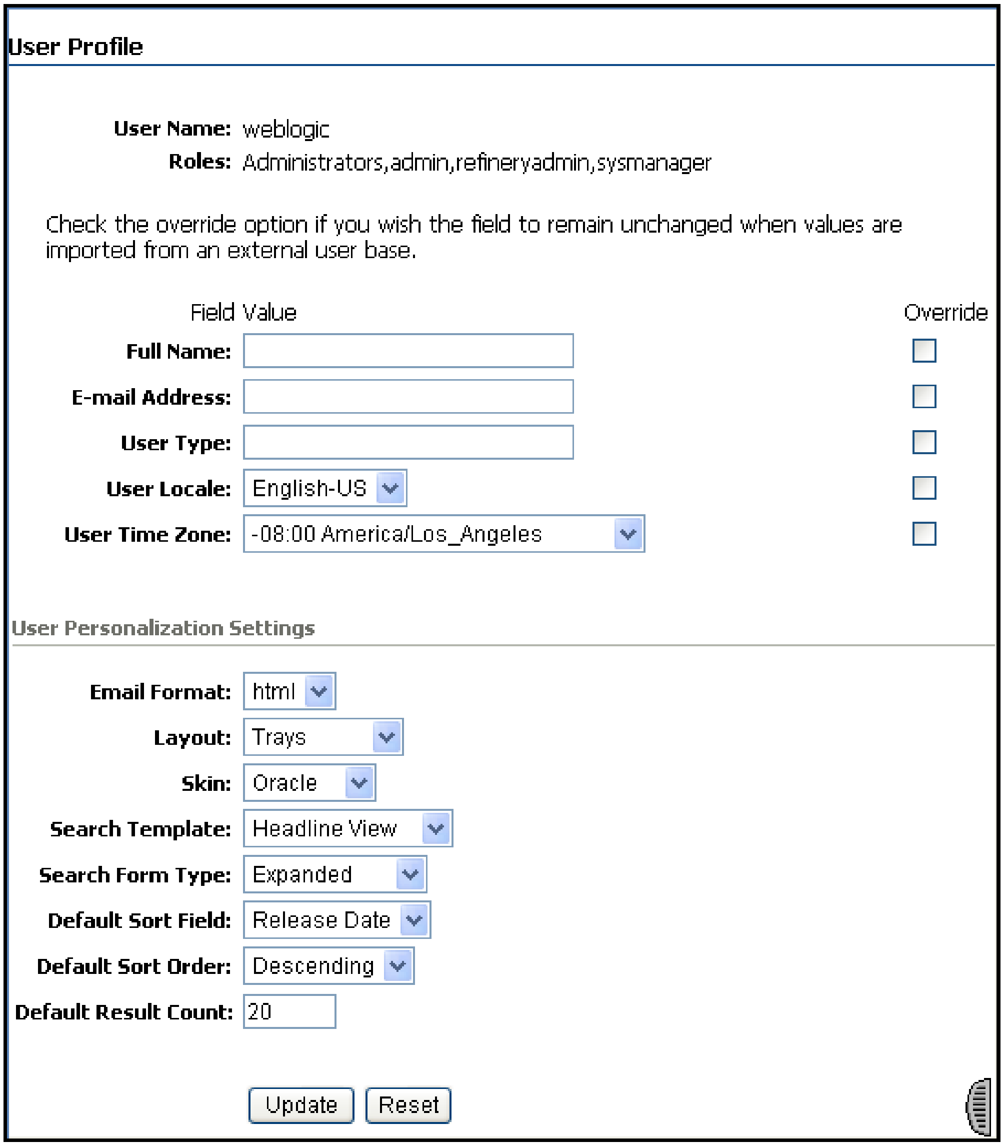
When you log in to Content Server, the system retrieves information about you from your *user profile*. While much of the information in your user profile (such as your user name and security permissions) can be changed only by the system administrator, there are several items you can change:

- You can change personal information, such as your full name, password, and e-mail address on the User Profile Page discussed in this section.
- You can add links to the My Content Server tray. Links provides quick access to things you use most often, such as predefined searches and your favorite Web sites. For more information, see Section A.1.4, "My Content Server Tray."
- You can personalize the way you search for and display content. You can specify the default search form used on the Advanced Search page and create new templates to display search results. For more information about search options, see Chapter 3, "Searching for Content Items."

2.4.2 User Profile Page

Your user profile defines basic information about you and specifies certain user-selected preferences. To access the user profile page, click the ***user_name*** link at the top of the main menu bar.

The options on this page can vary depending on the features that are enabled on your system. The following table describes standard user information fields and preferences.



Element	Description
User Name	The user currently logged in. You cannot modify this field.
Roles	The roles assigned to your user login. Roles determine what access you have to content and system functions. You cannot modify this field.
Full Name	The full name identifies the user in a more easily recognized way.
E-mail Address	The e-mail address that subscription and workflow notifications use for the current user.
User Type	An identifier used by the system administrator to place users in groups. *This field should not be changed.*

Element	Description
User Locale	Specifies the language and date and time format displayed on content server pages. If the system administrator has enabled multiple locale options, you can select the locale that you prefer. Select the **Override** check box next to this field to temporarily override the locale setting and to save your language choices.
Email Format	**html**: Formats subscription and workflow notification e-mails in HTML format. **text**: Formats subscription and workflow notification e-mails in plain-text format.
Layout	Specifies the user interface of Content Server. **Trays**: Trays is the default layout when Content Server is installed. Features include expanding trays in the Trays, including a **Search** tray and **Results** tab. Trays is a frame-based layout. **Top Menus**: Trays are removed from the Trays and replaced by menus located above the content area. The Top Menus layout does not use frames.
Skin	Skins provide predefined color and icon choices for each layout. **Oracle (Default)**: Predominantly blue and khaki **Oracle 2**: Predominantly blue and gold
Search Template	Specifies the default template used to present search results. You can change the search result view with the **Content Actions** menu on a search results page. When selected on a search results page, the view is saved as the default view for subsequent search results. **Classic:** Each item includes a thumbnail image or content type icon and multiple lines of metadata. **Headline:** Each item is shown on a single line with no thumbnail and minimal metadata. **Thumbnail:** Each item is shown with a thumbnail image or content type icon and minimal metadata arranged in multiple columns. **Custom Search Template:** A variable for a search template that your administrator may have made. A custom search template enables you to select a customized search result view, if this exists in your Content Server instance, including **Classic**, **Thumbnail**, and **Headline** formats for displaying search results. If the `Custom Search Template` variable is available in your instance, you or your administrator can create and save customized search templates and define what metadata to list in a search result and how to display it. A custom search template can be set as a default view, selected from a search results page, or associated with a particular targeted search query.
Search Form Type	Sets the default search form on the Advanced Search page. **Expanded Form**: Displays all search field options on a single page. **Query Builder Form**: Offers available search fields for selection from lists, and enables fields for direct edit of the query text.
Default Sort Field	Sets the default field by which to sort search results.

Element	Description
Default Sort Order	Sets the default order in which search results are displayed.
Default Result Count	Sets the maximum number of content items listed on a search results field.
Update	Saves any changes that were made on this page.
Reset	Resets the fields on this page to the previously saved settings.

2.4.3 Editing Your User Profile

Use the following procedure to edit your user profile information:

1. Click the ***user_name*** link at the top of the main menu bar.

   The User Profile Page opens.

2. Edit your full name, password, and e-mail address as necessary. Please note the following considerations:

   - If you are changing your password, you must enter the new password in both the **Password** and **Confirm Password** fields.

     If you are using an enterprise authentication system, the **Password** field might not be available.

   - Do not change your user type or user locale; these fields should be changed only by a system administrator.

   - Select the **Override** check box next to the **User Locale** field to temporarily override the locale setting and to save your language choices.

3. Select an option for e-mail notification format, either **HTML** or **text**.

4. Enable or disable the upload and download applets.

   > **Note:** The check boxes for the upload and download applets are displayed only if the system administrator enabled them.

5. Select a layout, skin, search template, and search form type.

   The documentation shows the user interface with the **Trays** menu selected.

6. Click **Update**.

2.4.4 Editing Saved Queries

Use the following procedure to edit links to saved queries in your My Saved Queries tray:

1. Click the **My Saved Queries** link in the My Content Server Tray.

   The Saved Queries Page opens.

2. To display the results of a query on the home page, select the **Default** option for that query, and select the **Show Default Query** check box.

3. To set the number of content items displayed on the home page for the selected default query, enter a number in the **Results on Portal Page** field, and select the **Show Default Query** check box.

4. Click **Update**.

Note: For information on how to save a query link to your My Saved Queries tray, see Section 3.4.2, "Saving a Query."

2.4.5 Saving Personal URLs

Use the following procedure to save links to Web sites in your My URLs tray:

1. Click the **My URLs** link in the My Content Server Tray.

   The URLs for User page opens.

2. Enter a descriptive name in the **Title** field. This name appears as the link in your My URLs tray.

3. Enter a complete Web address in the **URL** field; for example:

   ```
   http://www.oracle.com
   ```

4. Click **Update**.

3

Searching for Content Items

Oracle WebCenter Content Server stores the metadata you enter when you check in a content item in a database set up by your system administrator. You can search for content items using these metadata values. If your system administrator has configured the Oracle Text Search option or the database full-text search capability, then the text of content items is indexed and made available for searching as well.

Check with your system administrator to see which search solution or database is used and to see if full-text indexing is enabled.

This chapter covers the following topics:

3.1 Search Pages

You can perform a content item search from the following places in the Content Server interface:

3.1.1 Quick Search Field

With the Quick Search Field, you can perform a search regardless of the page in the content area. The Quick Search field performs a substring search of the title and content ID metadata, and the indexed full-text if it is supported on your system.

A substring search is equivalent to including a wildcard at the beginning and end of the search term. For example, if you enter `form` in the Quick Search field, the search returns items with words such as `forms`, `performance`, and `reform` in the title or content ID metadata, or in the indexed full-text if it is supported on your system.

You or your system administrator can also build custom searches targeted to search one or more metadata fields you specify, and make them available through the Quick Search field. You can create targeted searches with either the Query Builder Form or Expanded Form.

The Quick Search field supports Internet-style search syntax, complex construction, and alternate query formats. For more information, see Section 3.7, "Using Additional Search Capabilities."

3.1.2 Home Page Search Fields

With the search fields on the Home Page, you can perform a metadata search, a full-text search, or a combination of both. Only the most commonly used search fields are available from the home page.

Note: Your home page may have a different appearance than the default "out-of-the-box" content server home page, which includes search fields. If search functionality is not available from your home page or to search on additional metadata fields, use the Search Tray or Advanced Search Page.

3.1.3 Search Tray

With the Search Tray, you can perform a metadata, full-text, or combination search. Only the most commonly used search fields are available from the Search tray.

The Criteria Tab on the Search Tray displays a form where you can enter your criteria. The Results Tab displays the search results.

3.1.4 Advanced Search Page

With the Advanced Search Page, you can perform a metadata search, full-text search, or a combination of both on all available fields.

To access this page, click the **Advanced** link in the Search Tray or use the **Search** menu on the Toolbar.

The expanded form on the Advanced Search Page displays all search fields available to you on a single page. You can alternate between the expanded form and the query builder form using the **Search Forms** menu at the top of the search page.

You can also select a different search profile from the Switch Profile menu, if your system administrator has defined them for you. You can specify the default search form to use the Advanced Search page. For more information, see Section 2.4.2, "User Profile Page."

Note: Queries built using the Expanded form separate the metadata fields with the <AND> operator. Each search criterion entered into each field must be met for a result to be returned. For example, if you enter `January` into the Title field and `presentation` into the Type field, then a search finds content only if it has a `presentation` type and has `January` in the title.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the Query Builder Form.

3.1.5 Query Builder Form

The Query Builder Form creates and saves complex queries by selecting options from a series of lists. After a query is built, you can edit the query directly, perform the search, or save the query for easy access from **My Saved Queries**.

With the Query Builder form, you can separate the metadata fields with either the <AND> operator or the <OR> operator. If you use the <AND> operator, then each search criteria entered into each field must be met to return a result.

If you use the <OR> operator, then only one of each field's criteria must be met. For example, if you enter `January` into the Title field and `presentation` into the Type field separated by <OR>, then results include content that has either `presentation` as the type or has `January` in the title.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the Query Builder Form.

3.2 Working with Search Results

You can specify how to display the results of your search based on the number of content items returned per page and the order of the content items. For example, to find the most recent files that match your criteria, sort the results by release date. If you are searching for specific text such as `changed address`, sort your search results by score.

Use the Results Options area of the Advanced Search Page to control the display of the Search Results Page.

This section covers the following topics:

- Section 3.2.1, "Displaying Search Results"
- Section 3.2.2, "Changing the Search Results View"

3.2.1 Displaying Search Results

Use the following procedure to specify how to display the search results:

1. Display the Home Page Search Fields or Advanced Search Page.

2. Scroll down to the Results Options.
3. Set Results Per Page to the maximum number of content items to display on each Search Results Page.
4. Specify the Sort By method and order.
5. Click **Search**.
6. From the **Content Actions** menu on a Search Results Page, choose the view option to specify the search results view.

Notes:

- The **Clear** button clears the search fields, but does not clear the Results Options settings.
- For information about changing the defaults for sort field, sort order, and result count, see Section 2.4.3, "Editing Your User Profile."
- The system administrator can use the Content Server Configuration Manager to add or remove sortable fields. To change the fields available for sorting, see your system administrator.

3.2.2 Changing the Search Results View

Use the following procedure to change the default search results view:

1. Display the User Profile Page.
2. Scroll down to the **Search Template** option.
3. Click **Search Template**, and select the search result view.
4. Click **Update**.

3.3 Search Result Templates

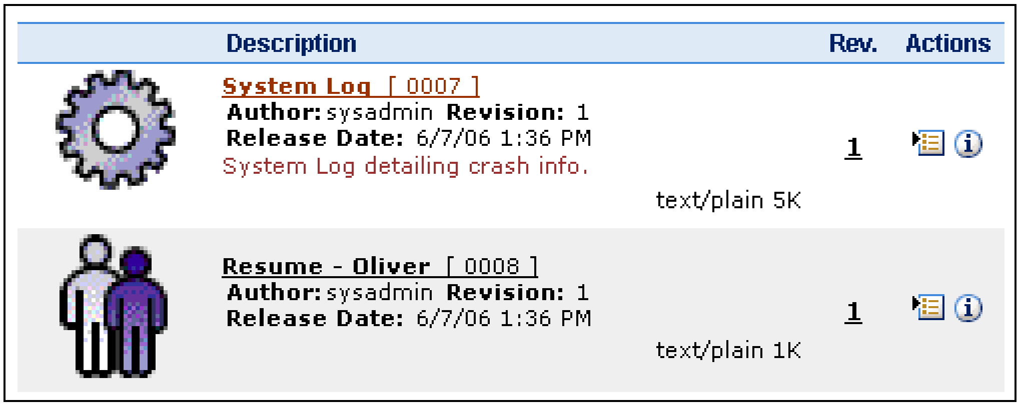
To personalize how search results are displayed, select an option from the list on the User Profile Page, or from the Search Results Page. There are three templates available by default, and you have the option to create new views based on the three provided templates using the Search Result Templates for User Page to identify the information and specify display options. In this way, you can customize the metadata information you want to see on a search result. You can even specify different search results templates to be used for different saved queries.

This section covers the following topics:

- Section 3.3.1, "Classic View Template"
- Section 3.3.2, "Headline View Template"
- Section 3.3.3, "Thumbnail View Template"
- Section 3.3.4, "Creating a Custom Search Result Template"

3.3.1 Classic View Template

The Classic template lists content items sequentially in single rows, based on the default sort field and order set on the User Profile Page.



Column	Description
Content icon or Thumbnail image	Displays an icon based on the content type. Optionally, if your system administrator has set up Content Server to create a thumbnail image of the content, then it displays the thumbnail image.
Description	Displays the following information: **Title and Content ID:** The title and unique identifier of the content item, linked to display a Web-viewable version of the content, if it is available. If no Web-viewable version is available, it links to the native file. The title and content ID are displayed in all custom search result templates based on the Classic View, even if those fields are not specifically selected from the Classic View Template section of the Create/Edit Classic View Search Result Template Page. **Author:** The person who checked in the content item. **Revision:** Identifies the revision number of the content item. **Release Date:** The date the content item was released. **Comments:** Comments entered when the item was checked in, if any. **Content Format:** The format of the native file.
Rev.	Displays the revision number of the content item.
Actions	Displays the **Actions** menu for an item and the **Content Info** icon. **Actions** icon: Click this icon to open a menu of actions for the selected content item. **Content Info** icon: Click this icon to display the Content Information Page.

3.3.2 Headline View Template

The Headline template by default lists items in a single line, with a minimum of information. The Headline template uses the sort field, sort order, and result count fields on the User Profile Page to arrange the results.

ID	Title	Date	Author	Actions
000066	Ref Test 10	1/22/07	sysadmin	
000065	BMP Image	12/5/06	sysadmin	
000064	Word Document	12/5/06	sysadmin	
000060	Word Document	12/5/06	sysadmin	

Column	Description
ID	A unique identifier of the content item, linked to a Web-viewable version of the content item, if it is available. If no Web-viewable version is available, it links to the native file.
Title	Displays the title of the content item without any associated link.
Date	Displays the date the content item was released.
Author	Displays the user name of the person who last checked in the content item.
Actions	Displays the **Actions** menu for an item and the **Content Info** icon. **Actions** icon: Click this icon to open a menu of actions for the selected content item. **Content Info** icon: Click this icon to display the Content Information Page of the selected content item.

3.3.3 Thumbnail View Template

The Thumbnail template by default lists items in a grid from left-to-right and top-to-bottom and displays an icon based on the content type, or a thumbnail image of the content if your system administrator has set up Content Server to create one. This template is particularly suited for displaying images and other graphic content. The grid arranges results based on the sort field and order set on the User Profile Page.

Item	Description
Icons	Displays the **Actions** menu for an item and the **Content Info** icon. **Actions** icon: Click this icon to open a menu of actions for the selected content item. **Content Info** icon: Click this icon to display the Content Information Page of the selected content item.
Thumbnail Icon or Image	Displays an icon based on the content type or a thumbnail image of the content if your system administrator has set up Content Server to create one, linked to a Web-viewable version of the content item, if it is available. If no Web-viewable version is available, it links to the native file.
Title	Displays the title of the content item without any associated link. To maintain the grid structure, long titles are truncated to a single line. Rolling the mouse over the title expands the text to display the full title.

3.3.4 Creating a Custom Search Result Template

Use the following procedure to create a custom search result template:

Note: If you have Oracle WebCenter Content: Records installed with Department of Defense (DoD) functionality enabled, the Security Classification field must always be displayed in a search result. If you do not include the Security Classification field when you customize a search result template, the Security Classification field is included automatically.

---

1. Navigate to the Search Result Templates for User Page.
   - From a search results page, choose **Customize** from the **Actions** menu.
   - Open the My Content Server Tray and click **My Search Result Templates**. The Search Result Templates for User Page opens.
2. Click the **Add Template** icon in the **Actions** column next to the provided List template on which you want to base your custom template. The Create Custom Template page opens.
3. If your custom template is not based on the provided Headline View template, skip to the next step. If your custom template is based on the Headline View template, select a metadata field to display as a column from the **Available Fields** box, and click the right arrow. The selected metadata field is added to the **Columns** field. You must select and move each field separately.

   To reorder the column display, use the up and down arrows next to the **Columns** field. Click the up arrow to move the selected column to the left in the results template. Click the down arrow to move the selected column to the right in the results template.
4. Select a metadata field to display in the **Description** column from the **Available Fields** box, and click **Move Here** beneath the **Description** box. The metadata field is added to the **Description** box. You must select and move each field separately.

   To reorder the column display, use the up and down arrows next to the **Main Information** field. Click the up arrow to move the selected item up in the

Description column. Click the down arrow to move the selected column down in the **Description** column.

Important: To display the selected fields, you must also display the **Description** metadata field as a column.

---

5. Click **Save**.

   For more information about custom search result templates, see Section A.3, "Creating and Editing Custom Search Result Templates."

3.4 Saving Queries

This section covers the following topics:

- Section 3.4.1, "About Saved Queries"
- Section 3.4.2, "Saving a Query"
- Section 3.4.3, "Rerunning a Recent Query"
- Section 3.4.4, "Clearing Recent Queries"
- Section 3.4.5, "Creating Quick Search Queries"

3.4.1 About Saved Queries

To quickly display results for a search that you perform often, you can save the search in the My Saved Queries folder in the My Content Server Tray.

After you save a query link, you can modify or delete the link from your Saved Queries Page.

You or your system administrator can also build custom searches targeted to search one or more metadata fields you specify, and make them available through the Quick Search field.

3.4.2 Saving a Query

Use the following procedure to save a search as a query link on the Saved Queries Page:

1. Specify the search criteria you want to save.
   - On the Search Tray, Home Page Search Fields, or Advanced Search Page, enter the search criteria in the associated fields.
   - On the Search Results Page, the criteria saved are the criteria that were used to display the results.
2. Choose **Save Search** from the **Actions** menu on the Search Results Page.

   A prompt dialog opens.
3. Enter a title to use as the link name for the saved query.
4. Click **OK**.

   The new link is shown under the My Saved Queries tray.

Note: For information about modifying and deleting saved queries, see Section 2.4.4, "Editing Saved Queries."

3.4.3 Rerunning a Recent Query

Use the following procedure to rerun a recent query.

To rerun a recent query:

1. Open the My Recent Queries folder in the My Content Server Tray.
2. Double-click the link for the query you want to run.

   The output from the query displays on your Search Results Page.

3.4.4 Clearing Recent Queries

Use the following procedure to clear all recent queries from your My Recent Queries tray.

To clear recent queries:

1. Open My Recent Queries in the My Content Server Tray.
2. Double-click the **Clear** link.

   Content Server deletes all links except **Clear** from the My Recent Queries folder.

3.4.5 Creating Quick Search Queries

Use the following procedure to build a targeted search available through the Quick Search field. You can create targeted searches with either the Query Builder Form or Expanded Form. To customize the query string directly, you must use the Query Builder Form as shown in this procedure.

1. Click **My Quick Searches** in the My Content Server Tray.

   The Quick Searches Page opens listing any existing quick search queries that you or an administrator have created. You must be an administrator to modify the quick searches defined by administrators.

2. To create a new Quick Search, click **Create New** beneath the My Quick Searches area.

   To edit an existing Quick Search, choose **Edit** from the associated Actions menu.

   The Create/Edit Targeted Quick Search Page opens.

3. From the Search Form menu, select the form to use to create the search query.

   The form you select when you create the quick search is the form you must use when you edit the quick search (the Search Form menu is not available when you edit an existing quick search.)

   The Expanded Form is selected by default. If you want to manually edit the query text, use the Query Builder form. For more information about these forms, see Section A.2.6, "Advanced Search Page."

4. Specify a Quick Search Key to select the search from the Quick Search list. Use lower case letters or numbers. Searches are listed in ascending order based on this key.

Duplicate keys within the My Quick Searches table are not allowed. Although it is best to use a single character, you can use multiple character keys to avoid duplicate key names. Only the first character acts as the shortcut. For Example, if you have keys a1, a2, and a3, the first time you press **a**, you select the search associated with key a1. The next time you press **a**, you select the search associated with key a2, and so on.

5. Specify the Quick Search Label to display in the Quick Search list.
6. Enter **#s** in one or more fields to represent the search terms entered by the user in the Quick Search field. To further restrict the search, you can provide specific values for one or more search fields, but you must include **#s** in at least one field.

   If you use the Query Builder form, you can manually edit the query when you click **show advanced query builder options** and then select **Modify Query Text**.

   For example, if you select the date field, the On or After operator, and specify #s to represent the user input, the resulting query text is:

   ```
   dInDate >= `#s`
   ```

   To create a query that shows check-ins within the last specified period of days, subtract the number of days entered by the user from the current date returned by the dateCurrent function:

   ```
   dInDate > `<$dateCurrent(-#s)$>`
   ```

7. Specify the number of results to show on each page, or use the default.
8. Specify how to sort the results, or use the defaults.
9. Specify the template to use to format the results, or use the default.
10. Click **Save**.

    The searches you create are displayed under My Quick Searches in the Quick Search menu.

3.5 Search Engine Options

Your Content Server can be configured with the either the Oracle Text Search option or the Database Metadata Search and Database Full-Text Search options for finding content items:

- Searching with Oracle Text Search

  If you have a license to use Oracle Text Search (in Oracle Database 11*g*) or Oracle Secure Enterprise Search 11*g*, the Oracle Text Search option enables the use of those technologies as the primary full-text search engine for Oracle WebCenter Content Server.

  If the system administrator configured Oracle Text Search, this option enables you to find a content item or items based on information about the file, actual text in the file, or both. The system administrator can also configure Oracle Secure Enterprise Search (Oracle SES) as the back-end search engine for Oracle Text Search.

- Searching with Database Metadata Search

  This option enables you to find a content item or items based on information about the file. The metadata search functionality is installed by default and is available even if other search engines are configured.

- Searching with Database Full-Text Search

  This option enables you to find a content item or items based on the actual text in the file. The database full-text search is available if the system administrator configured it.

> **Note:** In addition to the options outlined here, Content Server can integrate with other search engines. Check with your system administrator to see what options are available to you.

3.5.1 Searching with Oracle Text Search

If your system administrator has configured the Oracle Text Search option, you can specify full-text and metadata searches and select options to filter the results of a search by categories.

Oracle Text Search can filter and extract content from different document formats in different languages. It supports a large number of document formats, including Microsoft Office file formats, Adobe PDF, HTML, and XML. It can render search results in various formats, including unformatted text, HTML with term highlighting, and original document format.

This section covers the following topics:

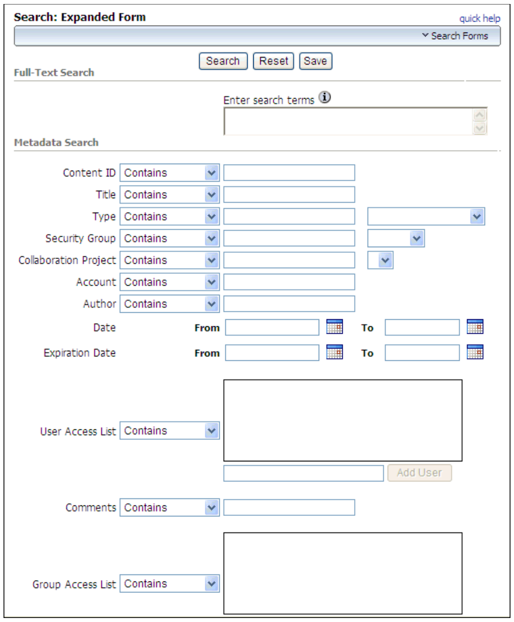
- Section 3.5.1.1, "Searching with the Expanded Form"
- Section 3.5.1.2, "Filtering Search Results"
- Section 3.5.1.3, "Searching with the Query Builder Form"
- Section 3.5.1.4, "Metadata Search Operators for Oracle Text Search"

3.5.1.1 Searching with the Expanded Form

On the Expanded Form, you can specify a metadata search, a full-text search, or both to identify a content item or items to search for. Also, you can specify result options.

Figure 3–1 shows part of the Expanded Form for specifying Oracle Text Search queries.

Figure 3–1 Expanded Form for Oracle Text Search



To specify a search on the Expanded Form:

1. On the Content Server home page, display the Home Page Search Fields from the **Search** menu or the Search Tray.
2. In the Metadata Search area of the Expanded Form, you can enter one or more search criteria for metadata fields:
   - Select the appropriate search operators.

     For more information, see Section 3.5.1.4, "Metadata Search Operators for Oracle Text Search."
   - Use Metadata Wildcards as necessary.

     For more information, see Section 3.7.1, "Metadata Wildcards."
   - Oracle Text Search is always case insensitive.
3. In the Full-Text Search area, you can enter text to search for in a content item or items, to refine your search.

   Note: When using Oracle Text Search with your Content Server instance, you cannot enter free-form metadata queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form. For more information, see Section 3.5.1.3, "Searching with the Query Builder Form."

   ---

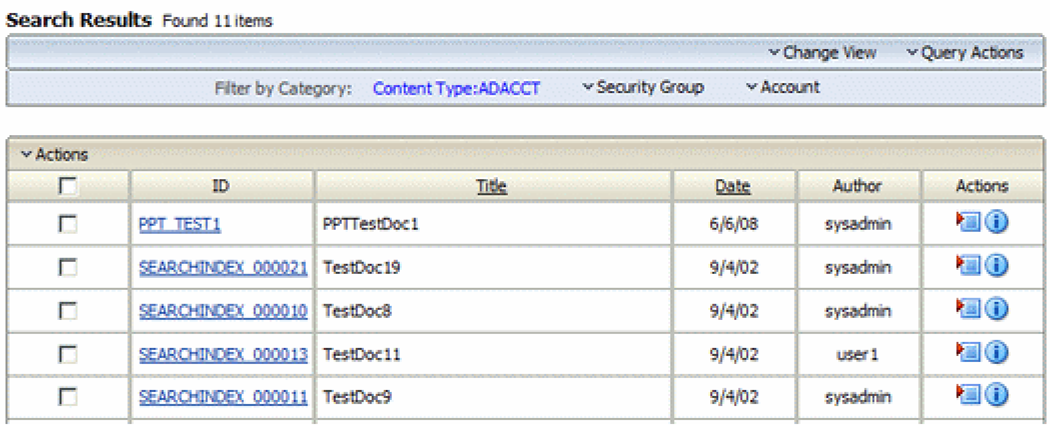
4. In the Results Options area, you can change the Results Options for displaying the results.
5. To save the search query under **My Saved Queries**, click **Save**.
6. To run the search query, click **Search**.

The content item or items that match your search criteria are displayed on the Search Results Page.

3.5.1.2 Filtering Search Results

The Search Results Page displays a menu bar with metadata categories you can use to filter the search results. Each category lists values that are valid for the particular search results. The system administrator can add or remove categories. The default set of categories include **Content Type**, **Security Group**, and **Account**.

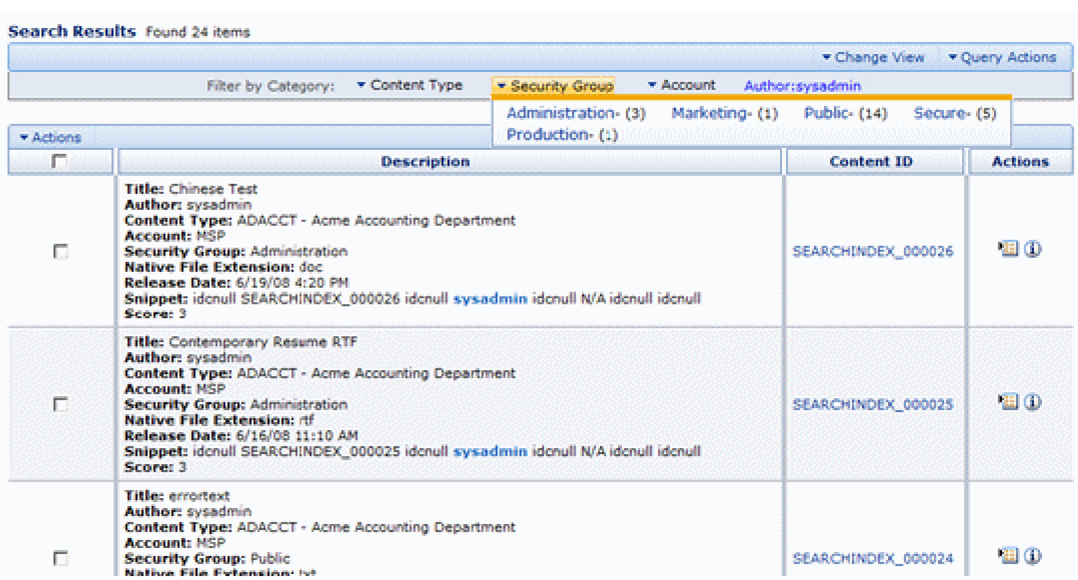
Figure 3–2 Search Results with Oracle Text Search Default Menu



An arrow next to the category name indicates that the search results include multiple values for that category. When you move your cursor over the option name, a menu displays the list of the values found in the search results for that category and the number of content items for each value. Click a value to filter the Search Results Page to list only the items that have the selected value in the selected category.

Figure 3–3 shows a list of categories under **Security Group** and the number of items found in each category.

Figure 3–3 Search Results with Expanded Oracle Text Search Menu



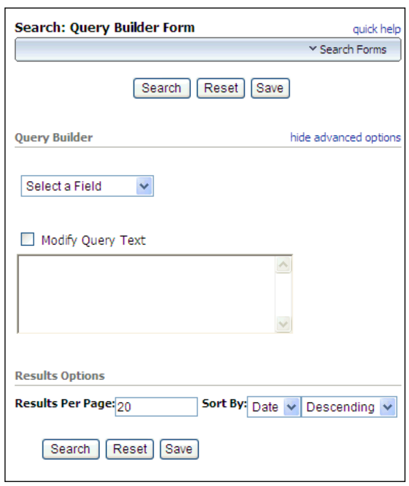
3.5.1.3 Searching with the Query Builder Form

On the Query Builder form, you can select search criteria from menus as required. You can build and save complex queries by selecting options from a series of lists. You can also manually edit the query text.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter free-form metadata queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form. For more information, see Section 3.5.1.3, "Searching with the Query Builder Form."

Figure 3–4 shows the Query Builder Form for specifying Oracle Text Search queries.

Figure 3–4 Query Builder Form for Oracle Text Search



To specify a search on the Query Builder Form:

1. On the Content Server home page, display the Home Page Search Fields from the **Search** menu or the Search Tray.
2. On the **Search Forms Menu**, choose **Query Builder Form**.
3. To edit the query, click **show advanced query builder options**, and then choose **Modify Query Text**.

   For example, if you select the date field, the On or After operator, and specify a date, the resulting query text is similar to the following:

   ```
   dInDate >= `9/22/11 12:00 AM`
   ```

   To create a search that shows check-ins within the last specified period of days, subtract the number of days (7 in the example below) from the current date returned by the dateCurrent function:

   ```
   dInDate > `<$dateCurrent(-7)$>`
   ```

4. In the Results Options area, you can change the Results Options for displaying the results.
5. To save the search query under **My Saved Queries**, click **Save**.

6. To run the search query, click **Search**.

3.5.1.4 Metadata Search Operators for Oracle Text Search

On the Advanced Search Page, you can use search operators to refine the search criteria. These operators are listed as options in lists to the left of each field.

The following table describes the search terms used and provides examples for use.

Operator	Description	Example
CONTAINS	Finds content items with the specified whole word or phrase in the metadata field. This operator is available only for Oracle Text Search, or for Oracle Database and Microsoft SQL Server database with the optional DBSearchContainsOpSupport component enabled. For more information, see your system administrator.	If you enter `form` in the Title field, the search returns items with the whole word `form` in their title, but does not return items with the word `performance`, `reform`, or `format`.
MATCHES	Finds items with the exact specified value in the metadata field.	When you enter `address change form` in the Title field, the search returns items with the exact title of `address change form`. A query that uses the MATCHES operator on a nonoptimized field behaves the same as a query that uses the CONTAINS operator. For example, if the `xDepartment` field is not optimized, then the query `xDepartment MATCHES 'Marketing'` behaves like `xDepartment CONTAINS 'Marketing'`, returning documents that have an `xDepartment` value of `'Marketing Services'` or `'Product Marketing'`.
HAS WORD PREFIX	Finds all content items with the specified prefix at the beginning of at least one word in the metadata field.	If you enter `form` in the Title field, the search finds all content items whose title includes the words `form` and `format`, but does not find the words `performance` or `reform`.

3.5.2 Searching with Database Metadata Search

This section covers the following topics:

- Section 3.5.2.1, "About Metadata Searching"
- Section 3.5.2.2, "Performing a Metadata Search"
- Section 3.5.2.3, "Metadata Search Operators for a Database Metadata Search"
- Section 3.5.2.4, "Metadata Search Case Sensitivity"

3.5.2.1 About Metadata Searching

Metadata searching is similar to finding a book in a library by searching for its author, title, or subject. When you search by metadata, you specify as much information as you know about a file or a group of files. For example, to find all files written by your supervisor for your department that were released on or after 1/1/2002, you would specify the following on the search page:

- Author: *supervisor's user name*
- Department: *department name*
- Release Date From: *1/1/2002*

Note: When you search for metadata, case sensitivity varies depending on how your system administrator has configured Content Server. For your specific configuration, see your system administrator.

When you use full-text searching, a search is case sensitive for metadata and case insensitive for full text. For Content ID, however, lowercase letters are converted to uppercase letters, so you cannot search Content ID with lowercase letters.

3.5.2.2 Performing a Metadata Search

Use the following procedure to search for files using metadata as the search criteria:

1. Display the Home Page Search Fields or the Search Tray.
2. Enter your search criteria in the Expanded Form.
   - Select the appropriate search operators.

     For more information, see Section 3.5.2.3, "Metadata Search Operators for a Database Metadata Search."
   - Use Metadata Wildcards as necessary.
   - Keep the case sensitivity of metadata searches in mind.

     For more information, see Section 3.5.2.4, "Metadata Search Case Sensitivity."
3. Select the Results Options for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the Search Results Page.

3.5.2.3 Metadata Search Operators for a Database Metadata Search

On the Advanced Search Page, use search operators to refine the search criteria. These operators are listed as options in lists to the left of each field.

The following table describes the search terms used and provides examples for use.

Operator	Description	Example
Substring	Finds content items with the specified string anywhere in the metadata field. This operator has the same effect as placing a wildcard before and after the search term. This is the default operator. This operator is not available for implementations that use Oracle Text Search.	When you enter `form` in the Title field, the search returns items with words such as `forms`, `performance`, and `reform` in their title.

Operator	Description	Example
Matches	Finds items with the exact specified value in the metadata field.	When you enter `address change form` in the Title field, the search returns items with the exact title of `address change form`.
Starts	Finds items with the specified value at the beginning of the metadata field. This operator has the same effect as placing a wildcard after the search term when using the Matches operator.	When you enter `form` in the Title field, the search returns all items with a title that begins with `form`, including `forms`, `forming`, and so on.
Contains	Finds items with the specified whole word or phrase in the metadata field. This operator is available only for Oracle Text Search, or for Oracle Database and Microsoft SQL Server database with the optional DBSearchContainsOpSupport component enabled. For more information, see your administrator.	When you enter `form` in the Title field, the search returns items with the word `form` in their title but does not return items with the word `performance` or `reform`.
Ends	Finds items with the specified value at the end of the metadata field. This operator has the same effect as placing a wildcard before the search term when using the Matches operator.	When you enter `form` in the Title field, the search returns all items with titles that end with `form`, such as `form`, `perform`, and `chloroform`.
Not Substring	Finds content items that do not have the specified string anywhere in the metadata field.	When you enter `form` in the Title field, the search returns items without words such as `forms`, `performance`, and `reform` in their title.
Not Matches	Finds items that do not have the exact specified value in the metadata field.	When you enter `address change form` in the Title field, the search returns items without the exact title of `Address Change Form`.

3.5.2.4 Metadata Search Case Sensitivity

Case sensitivity for metadata searches varies depending on how your system administrator has configured Content Server.

> **Note:** For your specific configuration, see your system administrator.

- Microsoft SQL Server: If Content Server is using database searching with Microsoft SQL Server, metadata searches can be case sensitive or insensitive, depending on how the database is setup.
- Oracle Database: If Content Server is using database searching with Oracle Database, metadata searches are always case sensitive and full-text searches are not case-sensitive.
- IBM DB2: If Content Server is using database searching with IBM DB2, metadata searches are case sensitive.

3.5.3 Searching with Database Full-Text Search

This section covers the following topics:

- Section 3.5.3.1, "About Full-Text Searching"
- Section 3.5.3.2, "Full-Text Search Rules"
- Section 3.5.3.3, "Full-Text Search Case Sensitivity"
- Section 3.5.3.4, "Oracle Database Full-Text Search Operators"
- Section 3.5.3.5, "Performing a Full-Text Search"

3.5.3.1 About Full-Text Searching

Full-text searching enables you to find a content item based on the text contained in the file itself. When you check in a content item into Content Server, the indexer stores all of the words in the Web-viewable version of the content item (PDF, HTML, text, or other supported file formats) in an index. A full-text search compares the search expression with the index and returns any content items and discussions that contain the search text.

A full-text search expression can include the following elements:

- Strings: partial words (such as *addr*)
- Words: individual whole words (such as *addresses*)
- Phrases: multiple-word phrases (such as *new addresses*)
- Operators: logic applied to words and phrases (such as *news AND addresses*)

For more information, see Section 3.5.3.2, "Full-Text Search Rules."

Search terms can be highlighted in the returned text, provided Content Server is using Oracle Database full-text search and your administrator has enabled the functionality. Forward (>>) and back (<<) navigation links bracket the highlighted text. Click the links to go to the next and previous result in the text.

3.5.3.2 Full-Text Search Rules

Use the following options to refine your full-text search criteria:

- You can use wildcards in full-text search queries.
- You can use search operators in full-text search queries.

  For more information, see Section 3.5.3.4, "Oracle Database Full-Text Search Operators."
- You can use Internet-Style Search Syntax.
- When you perform a full-text search, the search finds the word you specify *and* words that have the same *stem*. For example, searching for the word `address` finds files with the word `address`, `addressing`, `addresses`, or `addressed` in them. To limit the search to the word you specify, place the word in double quotation marks (for example, `"address"`).
- You can sort full-text search results by the number of occurrences of the search terms and the proximity of the search terms when you use an operator such as <NEAR>. Select the **Score** option from the **Sort By** list on the Search Results Page.

> **Note:** You can sort the results using the **Score** option only if you are using the Oracle 11*g* database search solution and have installed the Oracle Text Search option.

3.5.3.3 Full-Text Search Case Sensitivity

Case sensitivity for full-text searches varies depending on how your system administrator has configured Content Server. By default, full-text searches with Oracle Database are not case sensitive. Full-text searches with Microsoft SQL Server vary based on how the database is set up.

If your Content Server configuration includes an optional search engine, case sensitivity depends on the search engine. For your specific configuration, see your system administrator.

Tip: Generally, you should use all lowercase search strings to find all of the files that match your search expression. Use mixed-case search strings *only* if you are looking for a specific combination of lowercase and uppercase.

3.5.3.4 Oracle Database Full-Text Search Operators

Use the following operators to refine your Oracle Database full-text search expression.

Note: For clarity, the operators are shown in uppercase, but they can be in lowercase as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	`address AND name` returns content items that contain both specified words.
OR	Finds content items that contain at least one of the specified terms.	`safety OR security OR protection` returns content items that contain at least one of the specified words.
NOT	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	`NOT server` returns content items that do not contain the word `server`. `internet NOT server` returns content items that contain the word `internet` but do not contain the word `server`.
NEAR(term1, term2)	Finds content items that contain the specified terms near to each other. Terms that are closer receive a higher score.	`NEAR(internet,server)` returns content items that contain the specified words close to one another.
ISABOUT(phrase)	Finds content items that contain the phrase specified in the parenthesis.	`IS ABOUT(changed address)` returns content items that contain the specified phrase.

3.5.3.5 Performing a Full-Text Search

Use the following procedure to perform a full-text search:

1. Display the Quick Search Field, Home Page Search Fields, Search Tray, or Advanced Search Page.
2. Enter your search terms in the full-text search field.
   - Take the Full-Text Search Rules into account.

- Keep the case sensitivity of full-text searches in mind.

  For more information, see Section 3.5.3.3, "Full-Text Search Case Sensitivity."

3. Select the Results Options for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the Search Results Page or in the Results Tab in the Search Tray.

3.6 Searching for Expired or Expiring Content

By default, if you have write permission to any security group, you can access the Expired Content Page and perform a search for expired content. The search results include only the content for which you have at least read permission.

Use the following procedure to search for content that has expired or is set to expire:

1. Log in to Content Server.
2. Click **Content Manager** in the left navigation bar and click **Expired Content**.

   The Expired Content Page opens.

3. To search for content within a particular date and time range, specify dates and times in the **Before** and **After** fields or select a value from the associated list that is a day, a week, or a month before or after the current date and time.

   Note: The user locale setting determines the date format. For information about user locale, see Section 2.4.3, "Editing Your User Profile."

   By default, if you leave the **Before** and **After** fields blank, the search effectively returns all content set to expire after the current date and time.

4. To restrict the search results to expired content only, select **Expired Content**.

   If you select **Expired Content** and leave the **Before** and **After** fields blank, the search effectively returns all content that expired before the current date and time.

5. The Expired Content Page displays the date range applied and the expired or expiring content items that match the specified criteria.

3.7 Using Additional Search Capabilities

This section covers the following topics:

- Section 3.7.1, "Metadata Wildcards"
- Section 3.7.2, "Internet-Style Search Syntax"
- Section 3.7.3, "Complex Queries and Alternate Query Formats"

3.7.1 Metadata Wildcards

A wildcard substitutes for unknown or nonspecific characters in the search term. You can use wildcards in metadata searches, even when using the Quick Search field.

Use the following wildcards in metadata search fields:

- An asterisk (*) indicates zero or more alphanumeric characters. For example:

  - form* matches form and formula
  - *orm matches form and reform
  - *form* matches form, formula, reform, and performance
- A question mark (?) indicates one alphanumeric character. For example:
  - form? matches forms and form1, but not form or formal
  - ??form matches reform but not perform

> **Note:** To search for an asterisk (*) or a question mark (?) without treating it as wildcard, you must put quotation marks around your search term; for example: "here*"

3.7.2 Internet-Style Search Syntax

Search techniques common to the popular Internet search engines are supported in Content Server. For example, new product entered in the Quick Search field searches for new <AND> product, while new, product searches for new <OR> product. The following table lists how Content Server interprets common characters.

Character	Interpreted As
Space ( )	AND
Comma (,)	OR
Minus (-)	NOT
Phrases enclosed in double-quotes ("*any phrase*")	Exact match of entered phrase

The following table lists examples of how Content Server interprets Internet-style syntax in a full-text search.

Query	Interpreted As
new product	new <AND> product
(new, product) images	(new <OR> product) <AND> images
new product -images	(new <AND> product) <AND> <NOT> images
"new product", "new images"	"new product" <OR> "new images"

The following table lists examples of how Content Server interprets Internet-style syntax when searching title metadata using the substring operator.

Query	Interpreted As
new product	dDocTitle <substring> 'new' <AND> dDocTitle <substring> 'product'
new, product	dDocTitle <substring> 'new' <OR> dDocTitle <substring> 'product'
new -product	dDocTitle <substring> 'new' <AND> <NOT> 'product'
"new product"	dDocTitle <substring> 'new product'

Note: Internet-style search syntax is enabled by default, but your system administrator can disable it. Check with your system administrator if you have questions.

3.7.3 Complex Queries and Alternate Query Formats

Content Server allows for the use of parentheses for complex query construction and `field:value` and `site:value` formats when creating a query. By using these alternatives, you can more easily search the metadata field you want across multiple servers, if necessary, and refine your results. For example, to search only the title metadata for `new product` without having to go to the Advanced Search page, enter `dDocTitle:"new product"` into the Quick Search field. The search looks only in the field you specified before the colon. You must know the Content Server identifier for the metadata field you want to search.

Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form of the Advanced Search Page. Instead, you must use the advanced options on the Query Builder Form.

The following table lists some examples of complex and alternate query formats.

Query	Interpreted As
`dDocTitle:New`	`dDocTitle <contains> `New``
`dDocTitle:New product`	`(dDocTitle <contains> `New`) <AND> <ftx>`product`</ftx>`
`dDocTitle:New dDocTitle:product`	`dDocTitle <contains> `New` <AND> dDocTitle <contains> `product``
`dDocTitle:New,dDocTitle:product`	`dDocTitle <contains> `New` <AND> dDocTitle <contains> `product``
`dDocTitle:New dDocType:Presentations`	`dDocTitle <contains> `New` <AND> dDocType <contains> `Presentations``
`dDocTitle:New,dDocType:"Test Plan"`	`dDocTitle <contains> `New` <OR> dDocType <contains> `Test Plan``

3.8 Searching Referenced Links (optional)

If your administrator installed the optional Link Manager component, it evaluates, filters, and parses the URL links of indexed documents and then extracts the links for storage in a database table, making them available for searching. After the Link Manager component populates the table with the extracted URL links, it references this table to generate link search results, lists of link references for the Content Information page, and the resource information for the Link Info page. The Link Manager component shows these items:

- Lists of links using specific search criteria
- Detailed information about a specific link

- The links to other documents for a specific content item, and any documents that reference this item

The search results, link references lists, and Link Info pages are useful to determine what documents are affected by content additions, changes, or revision deletions. For example, before deleting a content item, you can verify that any URL references contained in it are insignificant. Another use might be to monitor how content items are used.

Note: Because the Link Manager component extracts the URL links during the Content Server indexing cycle, only the URL links of released documents are extracted. For content items with multiple revisions, only the most current released revision is available for searching.

This section covers the following topics:

- Section 3.8.1, "About Searching Links"
- Section 3.8.2, "Link References on the Content Information Page"
- Section 3.8.3, "Notification of Expiration"
- Section 3.8.4, "Performing a Link Search"
- Section 3.8.5, "Checking Content Item Link References"
- Section 3.8.6, "Checking the Link Information About Specific Links"

3.8.1 About Searching Links

Use the Search Links Page to search for links, using criteria stored in the repository database. Use this page to validate links, to determine where a resource is used, to determine if deleting a content item affects other documents, and so on.

The Link Search Results Page displays items matching your search criteria. Invalid or broken links are listed in bold font. Each item has an Link Item Actions Menu and an Info icon which displays a Link Info Page.

3.8.2 Link References on the Content Information Page

Use the **References** options to see whether the content item references or is referenced by other content items. **References** provides two options:

- **Show**: By default, the links are hidden when the Content Information page opens. Click **Show** to display all applicable links. If this content item contains one or more references to other documents, then these links are listed in the Links contained in this content item section. If other documents reference this content item, then those references are listed in the Links to this content item section.

  Links that are invalid or broken are listed using bold font. Click the **Info** link in the Actions column to display the Link Info Page for that particular link.
- **Hide**: Click **Hide** to hide the link information.

To access the available link information for content items, click any Content Information icon, which displays the Content Information Page and the **References** options. Or, you can choose either **Content Information** or **Target Content Info** from the Link Item Actions Menu, which also displays the Content Information page and the **References** options.

Note: You cannot delete a content item revision if other content items reference it unless the system administrator has set the *AllowForceDelete* configuration variable to true. When you delete a content item revision, the message indicates if another content item references the content item and asks if you are sure you want to delete it. In this case, deleting a content item that is referenced by another content item breaks those links and makes them invalid.

3.8.3 Notification of Expiration

With Link Manager installed, the Notification of Expiration page includes additional information for each content item that is expiring soon. The e-mail notification specifies if the expiring content item is referenced by another content item:

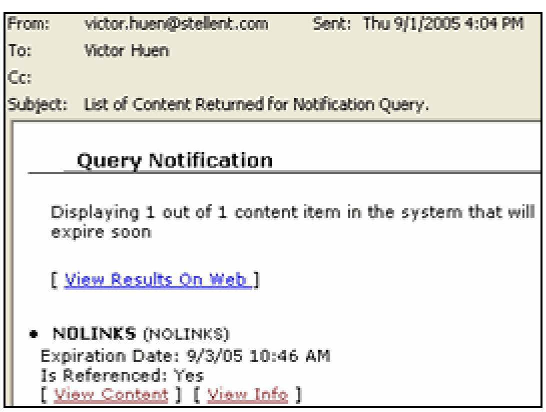
- Is Referenced: Yes
- Is Referenced: No

The e-mail does not provide a list of the content items that reference the soon-to-expire document. This information is available in the References section on the Content Information page. For more information, see Section 3.8.5, "Checking Content Item Link References."

If the Content Server configuration variable (`EnableExpirationNotifier`) has been enabled, an e-mail notification is sent to each author when content expires. For more information about setting this configuration variable, see "EnableExpirationNotifier" in the *Oracle WebCenter Content Idoc Script Reference Guide*.

Note: When a content item expires, it still exists in the Content Server. Expiration only removes the item from the index. Therefore, all links associated with an expired content item are functional if they involve a valid document.

Figure 3–5 Notification of Expiration E-mail for Author



3.8.4 Performing a Link Search

To search for links in content items:

1. Click the **Managed Links Search** link in the Content Management tray. The Search Links Page opens.

2. Enter the applicable values in the field(s). For more detailed descriptions of the fields, see the Link Search Results Page.
3. Click **Search**. The Link Manager component generates and displays the search results, as shown in the Link Search Results Page.

3.8.5 Checking Content Item Link References

Use the Content Information page to display, check, and verify all the link references associated with a specific content item. You can access the Content Information page for a content item from either of two pages, as described in these topics:

- Section 3.8.5.1, "Checking Link References from the Search Results Page"
- Section 3.8.5.2, "Checking Link References from the Link Manager's Search Links page"

3.8.5.1 Checking Link References from the Search Results Page

1. Search for the specific content item using the Content Server Search page.
2. Select a content item from the Search Results Page, and click the corresponding **Content Info** icon in the Actions column.

   The Content Information page for the selected content item opens. If this content item contains links or has links that reference it, **References Show** is displayed.
3. Click **References Show**.

   All applicable links are displayed. The *Links contained in this content item* section lists all the links included in this content item that reference other documents. The *Links to this content item* section lists all the links in other documents that reference this content item.

3.8.5.2 Checking Link References from the Link Manager's Search Links page

1. Open the Search Links page and search for links. For details, see Section 3.8.4, "Performing a Link Search."
2. Select a link from the Search Results section.
3. Click the **Content Info** icon in the Actions column.

   The Content Information page for the selected content item opens. If this content item contains links or has links that reference it, **References Show** is displayed.
4. Click **References Show**.

   All applicable links are displayed. The *Links contained in this content item* section lists all the links included in this content item that reference other documents. The *Links to this content item* section lists all the links in other documents that reference this content item.

Note: To display the Link Info Page for any link listed in the References sections (either *Links contained in this content item* or *Links to this content item*), click the corresponding **Info** link in the Actions column.

3.8.6 Checking the Link Information About Specific Links

Use the Link Info page to view additional information about a specific link. You can access the Link Info Page for any link from either of two pages, as described in these topics:

- Section 3.8.6.1, "Checking Link Information from the Content Information Page"
- Section 3.8.6.2, "Checking Link Information from the Search Links Page"

3.8.6.1 Checking Link Information from the Content Information Page

1. Open the Content Information page for a specific content item and display the applicable links. For details, see Section 3.8.5, "Checking Content Item Link References."
2. Select a link from a list in the References sections (either *Links contained in this content item* or *Links to this content item*).
3. Click the corresponding **Content Info** link in the Actions column.

   The Link Info page for the selected link opens.

3.8.6.2 Checking Link Information from the Search Links Page

1. Open the Search Links page and search for links. For details, see Section 3.8.4, "Performing a Link Search."
2. Select a link from the Search Results section.
3. Click the Actions icon in the Actions column. The Link Item Actions Menu opens.
4. Choose the **Link Info** menu option.

   The Link Info page for the selected link opens.

3.9 Content Data Tracking and Reporting

Content Tracker and Content Tracker Reports are optional components that provide information about system usage. This section covers the following topics:

- Section 3.9.1, "About Content Tracker"
- Section 3.9.2, "About Content Tracker Reports"

3.9.1 About Content Tracker

Content Tracker monitors your system and records information about various activities. Content Tracker collects this information from various sources, then merges and writes the information to a set of tables in your Content Server database. You can customize Content Tracker to change or expand the types of information it collects. Content Tracker monitors activity based on:

- Content item accesses:

  Content Tracker gathers information about content item usage from Web filter log files, the Content Server database, and other external applications such as portals and Web sites. Content item access data includes dates, times, content IDs, current metadata, user names, and profile information about users.

- Content Server services:

Content Tracker tracks all services that return content and services that handle search requests. And, with a simple configuration change, Content Tracker can monitor literally any Content Server service, even custom services.

3.9.2 About Content Tracker Reports

After Content Tracker extracts data and populates applicable database repository tables, the information is available for report generation. With Content Tracker Reports, you can:

- Generate reports:

  Content Tracker Reports queries the tables created by Content Tracker and generates summary reports of various kinds of activities and the usage history of particular content items. The reports help you analyze specific groups of content or users based on metadata, file extensions, or user profiles. You can use the pre-defined reports that are provided, customize them to suit your installation, or use a compatible third-party reporting package.

- Optimize content management practices.

  You can also use the reported data for content retention management. That is, depending on the access frequency of particular content items during specific time intervals, you may decide to archive or delete some items. Similarly, applications can use the data to provide portlets with the top content for particular types of users.

This section covers the following topics:

- Section 3.9.2.1, "Content Access Reports"
- Section 3.9.2.2, "Content Dashboard Feature"
- Section 3.9.2.3, "Drill Down Report Feature"

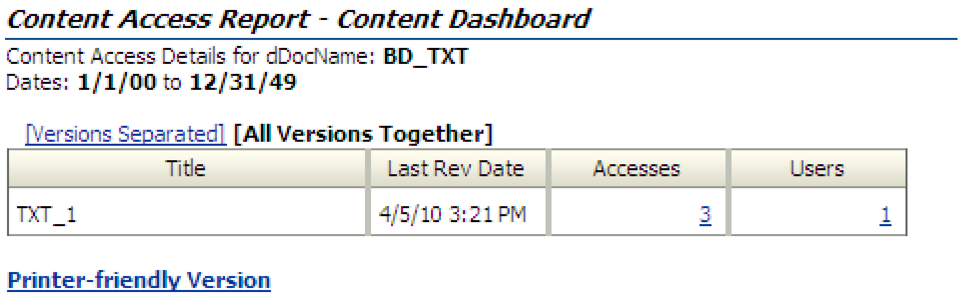
3.9.2.1 Content Access Reports

Each report produced using the Content Tracker Report Generator main page has the same general format and visual layout. Only users that actually request and open content items are included in the Content Tracker Report Generator's compiled results. Users that open only the Content Information page are not included in the tracked data.

The opened content item can be the Web location file (the absolute path to the content item), an HTML version (by using Dynamic Converter), or the actual native file. There is generally a one-day delay from the time that a user accesses a content item until the Content Tracker Report Generator's access history includes the information. For more information, see Section A.13, "Content Tracker Interface."

3.9.2.2 Content Dashboard Feature

When a generated query report contains an active link to a specific content item, click the link to display the corresponding Content Dashboard. The content dashboard image shows that one version of a particular content item was accessed three times by one user.



3.9.2.3 Drill Down Report Feature

There are various levels of report results that are generated for each predefined report. Depending on the search criteria you enter on the Content Tracker Report Generator main page, the results are filtered accordingly. The top level reports are summary reports and provide very general information. You can use the links on the top level reports to drill down to more specific information.

4 Working with Content Items

This chapter describes how to work with content item revisions and metadata including how to sign content items electronically, how to participate in a discussion about a content item, and how to subscribe to content item revisions.

- Section 4.1, "Understanding the Lifecycle of a Content Item"
- Section 4.2, "Content Item Metadata"
- Section 4.3, "Viewing a Content Item"
- Section 4.4, "Signing Content Electronically"
- Section 4.5, "Discussing Content"
- Section 4.6, "Subscribing to New Revisions of a Content Item"

4.1 Understanding the Lifecycle of a Content Item

This section covers the following topics:

- Section 4.1.1, "Revision Lifecycle"
- Section 4.1.2, "Revision Status"
- Section 4.1.3, "Determining the Revision Status"
- Section 4.1.4, "Viewing the Revision History"
- Section 4.1.5, "Deleting Revisions"
- Section 4.1.6, "Expired Content"

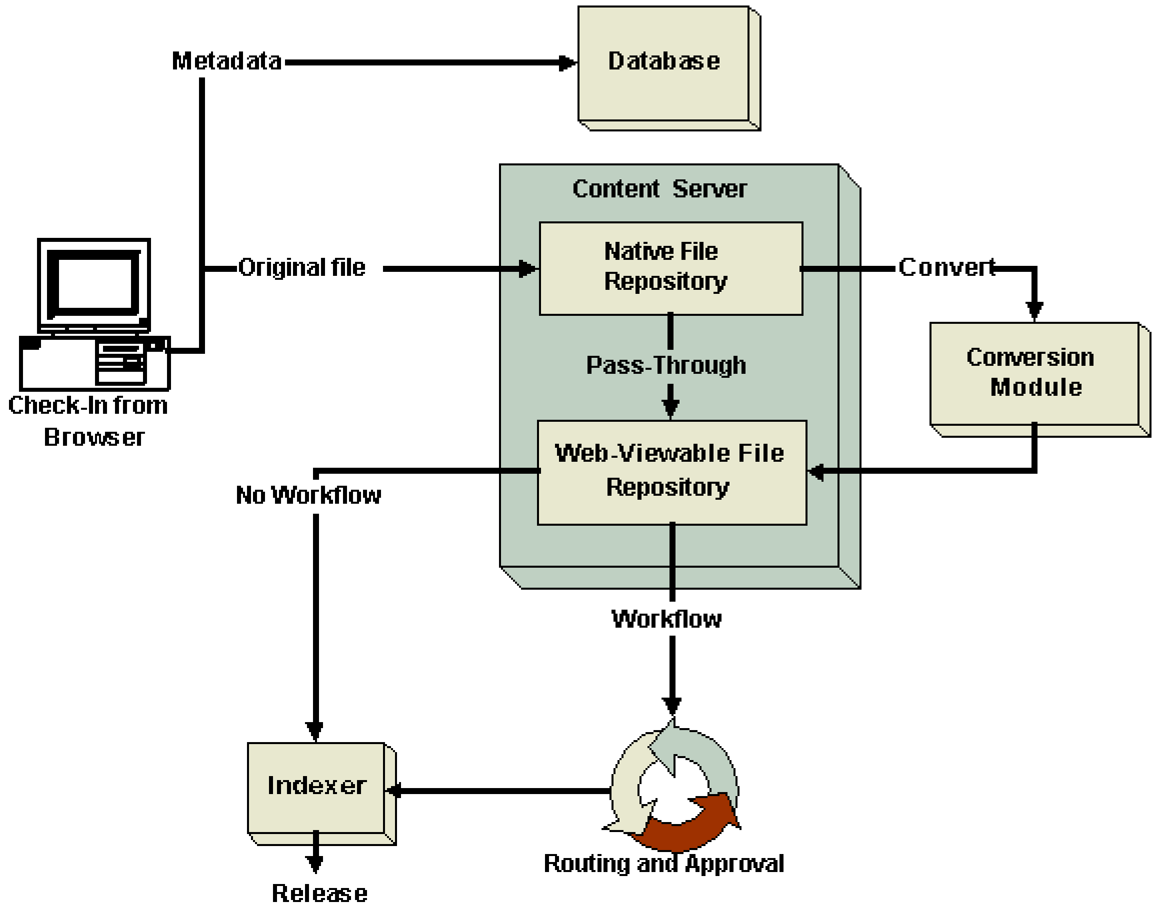
4.1.1 Revision Lifecycle

When you check in a new content item or revise an existing content item, the following process is used:

1. The contributor logs in to Content Server through a Web browser and displays the check-in window.
2. The contributor specifies the content item name, enters information about the content item (metadata), and specifies security information (security group and account, if enabled). By default, the user who checks in the content item is designated as the author.
3. The native file repository stores a copy of the native file, and the content information database stores the content item's metadata.

4. If a conversion product is set up for the specified file format, it converts the file to a Web-viewable format (for example, PDF). If the file cannot be converted, it is "passed through" in its native format.
5. If the file is converted, the Web-viewable file repository stores the converted file. If the file passes through in unconverted form, the Web-viewable file repository stores a copy of the native file.
6. If the content item's metadata meets the criteria for an enabled workflow, it goes through the workflow process.
7. The content item or its metadata only are indexed in the Web-viewable file repository when the content item meets all of the following criteria:
   - The content item converts successfully or passes through
   - The content item is approved at all steps of a workflow (if any)
   - The content item reaches its release date
8. On the content item's release date, the content item becomes available in Content Server.
   - You can find the content item by browsing through the defined hierarchical link structure (the "Library"), or by searching for metadata or specific text.
   - When users view the content item, they can retrieve the Web-viewable file, the native file, the metadata, or any combination of these.

Figure 4–1 Revision Lifecycle



4.1.2 Revision Status

A content item revision changes status several times within its lifecycle.

Status	Description
Waiting	The content item has a revision in the system but has not been sent for conversion.
GenWWW	The content item is being converted to Web-viewable format or is being indexed, or has failed conversion or indexing.
Done	The content item is waiting to be released on its specified release date.
Released	The revision is available in Content Server.
Review	The revision is in a workflow and is being reviewed.
Edit	The revision is at the initial contribution step of a workflow.
Pending	The revision is in a basic workflow and is waiting for approval of all revisions in the workflow.
Expired	The revision is no longer available for viewing in Content Server. (The revision is not removed from Content Server, but only an administrator can access it.)

Status	Description
Deleted	The revision has been deleted and is waiting to be completely removed from Content Server during the next indexing cycle.

4.1.3 Determining the Revision Status

Use the following procedure to determine the status of a content item:

1. Click the **Content Management** tray in the Trays.
2. Click **Work In Progress**.

   The Work In Progress Page opens
3. If the content item you are looking for is listed, the status is shown next to the content ID.
4. If the content item you are looking for is not listed, it could be released (that is, have the Released status) or it could be in a workflow. Locate the content item by browsing or searching and display the Content Information Page for the content item. The revision status is shown in the Status field.

4.1.4 Viewing the Revision History

Each time you check out a content item and check it back in, Content Server creates a new revision of that content item. The new revision has the same content ID as the previous revision, but the native file and the metadata can be the same or different. The system stores the previous versions of a content item, so you can review them as necessary.

To view the Revision History for a content item, open the Content Information Page for that item and scroll to the bottom of the window.

4.1.5 Deleting Revisions

To delete a content item revision, perform the following steps:

Note: You must have delete permission for the content item to delete a revision.

1. Display the Content Information Page for the content item.
2. In the Revision History section, click the **Delete** button for the revision you want to delete.

   You are asked to confirm the deletion.
3. Click **OK** to delete the revision.

The revision is no longer accessible and is permanently deleted from the system during the next indexing cycle.

4.1.6 Expired Content

A content item can have an expiration date that specifies when the content item is no longer accessible through the standard interface for searching or viewing. All revisions of the content item expire when the content item expires.

To determine if a content item has expired, use the Expired Content Page in the **Content Management** tray.

When a content items expires, the item and its revisions are not deleted from Content Server, but they can be accessed only from the Repository Manager by an administrator unless Notification of Expiration is in use.

4.2 Content Item Metadata

Metadata is information about a content item, such as the title, author, release date, who can access the content item and its metadata, and so on. You can use metadata to find content items in Content Server, much as you would search for books in a library by author or subject. When you check in a content item, you assign some metadata values, while Content Server assigns some metadata values automatically. The metadata is stored in a database that works with Content Server.

This section covers the following topics:

- Section 4.2.1, "Viewing Content Information"
- Section 4.2.2, "Updating Metadata"
- Section 4.2.3, "Recategorizing Metadata"

4.2.1 Viewing Content Information

Use the content information page to view metadata and other information about a specific content item.

Use any of the following procedures to view the Content Information Page for a content item:

- From the Search Results Page, click the **Info** icon to view the Content Information page for that content item.
- From the Search Results Page, click the **Actions** icon in the Actions column to open a contextual menu, and choose **Content Information**.
- From the Check-In Confirmation Page, click the **Content Info** link to view the Content Information Page for the content item you just checked in.

4.2.2 Updating Metadata

To change the metadata for a content item, you must have Write permission for the content item. You can change the author field only if you have Admin permission for the content item. Some metadata fields, such as the content ID and the release date, cannot be modified.

Use the following procedure to update content item metadata:

1. Display the Content Information Page for the revision you want to update.
2. Choose **Update** from the **Content Actions** menu.

   The Info Update Form opens.
3. Change the metadata fields as necessary.

   Note: The **Reset** button returns the fields to their original values.

4. Click **Submit Update**.

You can also change the metadata while checking in a revision to the content item. For details, see Section 5.4.3, "Checking In a Revised File."

4.2.3 Recategorizing Metadata

When enabled, use the Content Categorizer component to suggest metadata values for documents checked in to Content Server, and to recategorize the metadata of documents that are in Content Server. The metadata values are determined according to search rules provided by the system administrator.

To categorize or recategorize documents, Content Categorizer can operate in Interactive mode. In this mode, Content Categorizer is integrated with the Content Check In form in Content Server. Click the **Categorize** button on either form to run Content Categorizer on a single content item. Any value that Content Categorizer returns is a suggested value. You can edit or replace the suggested value.

4.3 Viewing a Content Item

After you find a content item, you can view it in several ways, depending on the available renditions of the content item, the conversion setup for your system, and the configuration of your Web browser. Depending on your access permissions, you may also be able to open or get a copy of the native file.

This section covers the following topics:

- Section 4.3.1, "Viewing a Web-Viewable File"
- Section 4.3.2, "Viewing a Native File"

4.3.1 Viewing a Web-Viewable File

To view the Web-viewable rendition of a content item, you must have the appropriate helper application or Web browser plug-in installed. For example, to view the PDF version of a content item, you must have the Adobe Acrobat plug-in.

You can view a Web-viewable file as follows:

- From a Content Information Page, click the **Web Location** link.
- From a Search Results Page, click the **Content ID** link in the ID column (Headline view) or Description column (Classic View), or the thumbnail (Classic and Thumbnail views).

If a Web-viewable file does not exist, or you do not have the correct helper application or plug-in installed, you are prompted to either save the file or open it in its native application. For details, see Section 4.3.2, "Viewing a Native File."

4.3.2 Viewing a Native File

When you view the native file of a content item, you are prompted to either save a copy of the file or open it in its native application. If you choose to open the file, you are actually opening a copy of the native file that is stored in a temporary location on your hard drive. You are not opening the native file that is stored in Content Server repository.

You can access a native file as follows:

- From a Content Information Page, click the **Native File** link.
- From a Check-Out Confirmation Page, click the **Download *`native file`*** button.

- From a Workflow Review Notification Message, click the **Review workflow item** link to open the Workflow Review page, and then click the **Native File** link under Renditions.

4.4 Signing Content Electronically

If the Electronic Signatures component is enabled, you can optionally sign a content item with an electronic signature that uniquely identifies the contents of the file at a particular revision and associates the revision with a particular user.

This section covers the following topics:

- Section 4.4.1, "About Electronic Signatures"
- Section 4.4.2, "Signing a Content Item Electronically"
- Section 4.4.3, "Viewing Electronic Signature Information"
- Section 4.4.4, "Search for a File in Revisions"
- Section 4.4.5, "Search for a File in the Repository"

4.4.1 About Electronic Signatures

An electronic signature is a unique identifier computed from the binary content of a content item and associated with other metadata such as the name of the user who signs the content item. Unlike a digital signature, which uniquely identifies both the document and the signer and encrypts the information with the document, an electronic signature is not stored with the document.

When you check in a content item, Content Server generates the identifier and stores it with the revision metadata for the content item. When you "sign" a content item, a copy of the identifier is stored with the electronic signature metadata. When you check in a modified revision of the content item, a new identifier is calculated.

Content Server can compare the identifier stored with the content item to the identifier stored with the electronic signature to help you determine if a signed content item has changed and if existing signatures for a content item are valid.

Note: The identifier is computed from the content only, not the associated metadata. A change in the metadata for a content item does not invalidate the electronic signature for the content item.

Because electronic signatures are stored separately from both the content item and from its metadata, multiple users can sign a particular content item revision. For example, in a workflow approval process, multiple reviewers may sign a revision of a content item.

Any user with access to the Document Information page for a content item can sign the content item. You can also provide an electronic signature as part of a workflow approval step. For more information, see Section 7.2.2, "Reviewing Revisions in a Workflow."

You can access signature information for a signed content item from the Content Information - Signatures Tab. For more information about signing a content item, see Section 4.4.2, "Signing a Content Item Electronically."

4.4.1.1 Signable Objects

The following table describes the restrictions on objects that you can sign electronically:

Object	Description
Content Items	You can sign any content item, such as a document, an image, a zip file, and so on. You can sign the native file, but not other renditions, such as web-viewable versions of the native file.
Folios	You can sign a folio, provided it has been frozen.
Metadata-only	You cannot sign items that do not have an associated content item, such as metadata profiles or Content Server folders. Because metadata itself is not used to calculate the signature ID, a change to the metadata for a content item does not constitute a change to the electronic signature for the content item.

4.4.1.2 Signature Metadata

When you sign a content item electronically, the signature is automatically associated with your user name and certain information about the content item such as the content name and revision ID. You must provide your password to sign a content item revision, and you typically provide additional information such as the reason for signing the document.

Your system administrator may also define additional metadata fields that are stored as part of the metadata for the electronic signature. For information about default signature metadata fields, see Section A.6.13, "Sign Content Item Page."

Note: Because signature metadata is stored separately from content item metadata, you cannot search for electronic signature metadata with the standard search options provided.

A system administrator can use signature metadata in a watermark to indicate that a PDF document has been electronically signed. For more information, see the *Oracle WebCenter Content Application Administrator's Guide for Content Server*.

4.4.1.3 Signature Verification

When a content item itself is modified, it produces a different computed identifier. By comparing the identifier of a content item with the stored signature, Content Server can determine whether the signature for a particular revision is still valid.

Because identical files produce the same calculated identifier, you can compare a file in a local file system to a particular content item revision to determine if the files are identical. For more information, see Section 4.4.4, "Search for a File in Revisions."

You can also verify a file from a local file system against all signed or unsigned content to which you have access. For more information, see Section 4.4.5, "Search for a File in the Repository."

4.4.2 Signing a Content Item Electronically

To electronically sign a content item, perform the following steps:

1. Display the Content Information Page for the revision you want to sign.

2. Choose **Sign Content** from the **Content Actions** menu.

   The Sign Content Item Page opens. The page provides information about the selected content item.

3. Your user name is preselected. Specify your password.

4. Specify additional metadata fields as necessary.

   > **Note:** The **Reset** button returns the fields to their original values.

5. Click **Sign**.

   The Electronic Signature Confirmation page opens.

6. To view signature information for the current revision, click the **View Signature Information** link.

   The Content Information - Signatures Tab opens. This page is also accessible as a tab on the Content Information Page.

4.4.3 Viewing Electronic Signature Information

To view signature information for an electronically signed content item, perform the following steps:

1. Display the Content Information Page for the content item.

2. In the Revision column, click the revision for which you want to view signature information.

   If the selected revision of the content item has one or more electronic signatures, a Signatures tab is included at the top of the page.

3. Click the **Signatures** tab.

   The Content Information - Signatures Tab opens. The page provides information about the all signatures for the selected content item revision, including any associated workflows the validation status of each signature.

4. To view complete signature metadata for a signature, click the Signature Details icon in the left-most column for the associated signature.

5. To view signature information for all revisions of the current content item, choose **All Revisions** from the **Change View** menu.

   The Signatures tab updates to show signature information for all revisions of the current content item.

   > **Note:** The column with validation status is replaced by the revision number in this view with the currently selected revision in bold and surrounded by brackets. Validation of signatures is provided for a single revision only.

6. To view complete signature metadata for a signature, click the Signature Details icon in the left-most column for the associated signature.

4.4.4 Search for a File in Revisions

To compare a file in a local file system to the signed revisions of a content item, perform the following steps:

Note: The external file is compared to signed revisions only.

1. Display the Content Information - Signatures Tab for the signed content item you want to compare with the external file.
2. Click **Search For Local File In Repository** in the menu area.

   The Search for Local File Page opens. The page provides information about the content item to compare.
3. To select an external file, click **Browse**.

   The File Upload window opens.
4. Navigate to the location of the external file, select the file, and click **Open**.

   The file path for the selected file is shown in the **File Path** field. Click **Reset** to clear the field.
5. Click **Validate**.

   A signature validation page opens that indicates whether the file successfully matches any signed revision of the content item.
6. If the external file matches a signed revision, you can click the **View Content Info** link to display the Content Information Page with the matching revision selected.

   If the external file matches a signed revision other than the most current revision, you can click the **newer signed revision** link to display the Content Information Page with the newer revision selected.

4.4.5 Search for a File in the Repository

To compare a file in a local file system to all signed or unsigned content in the system to which you have access, perform the following steps:

Note: The external file is compared only to revisions to which you have access.

1. In the **Content Management** tray, click **Search For Local File In Repository**.

   The Search for Local File Page opens. The page indicates that the comparison is for all signed content in the system.
2. To select an external file, click **Browse**.

   The File Upload window opens.
3. Navigate to the location of the external file, select the file, and click **Open**.

   The file path for the selected file is shown in the **File Path** field. Click **Reset** to clear the field.
4. Click **Validate**.

   A signature validation page opens that indicates whether the file successfully matches any signed revision of the content item.

5. If the external file matches a signed revision, you can click the **View Content Info** link to display the Content Information Page with the matching revision selected.

   If the external file matches more than one signed revision, the results are displayed in a table format. You can click the Information icon to the left of the matching item to display the Content Information Page for that item.

   If there are multiple matches, the window remains open until you click **Close Window**.

4.5 Discussing Content

Content Server comes with the ThreadedDiscussions component. If enabled, it allows contributors to post questions and comments about the content item throughout multiple revisions. This component must be installed and enabled by your system administer for this functionality to be available.

This section covers the following topics:

- Section 4.5.1, "About Discussion Posts and Threads"
- Section 4.5.2, "Initiating a Discussion from the Content Information Page"
- Section 4.5.3, "Initiating a Discussion from the Search Results Page"
- Section 4.5.4, "Initiating a Discussion from the Workflow Review Page"
- Section 4.5.5, "Viewing a Threaded Discussion"
- Section 4.5.6, "Replying to a Posting"
- Section 4.5.7, "Printing a Threaded Discussion"
- Section 4.5.8, "Deleting a Threaded Discussion"
- Section 4.5.9, "Searching with the Discussion Type Field"

4.5.1 About Discussion Posts and Threads

Threaded discussions provide question and answer feedback about a content item and help record how and why changes were made to a content item. Because threaded discussion posts follow content through multiple revisions and refer to the revision for which the comment was made, threaded discussions help contributors keep track of enhancement requests or other recommendations for future changes to the content. Each discussion post conveniently lists the revision number of the content to which it refers, so you do not have to view the content information of previous revisions to post to a discussion item.

Discussions are managed content items. When you begin a discussion thread about a content item, an .hscp form for the discussion is created, given the same ID as the content with `_d` appended to the end, associated with the content item, and automatically checked in to Content Server.

Unlike other content items, edits to a discussion do not create new revisions of the discussion content itself. Instead, the .hscp form that contains the discussion is modified. The Revision History for discussion content is always Revision 1. The revision number does not increment for discussion content. The number of the post represents the chronological order in which the comments were posted.

In Figure 4–2, each top-level post represents a thread. Posting number one (#1) and posting number two (#2) are threads. The reply (#3) to thread number two represents a post within a thread.

Figure 4–2 Threads and Posts

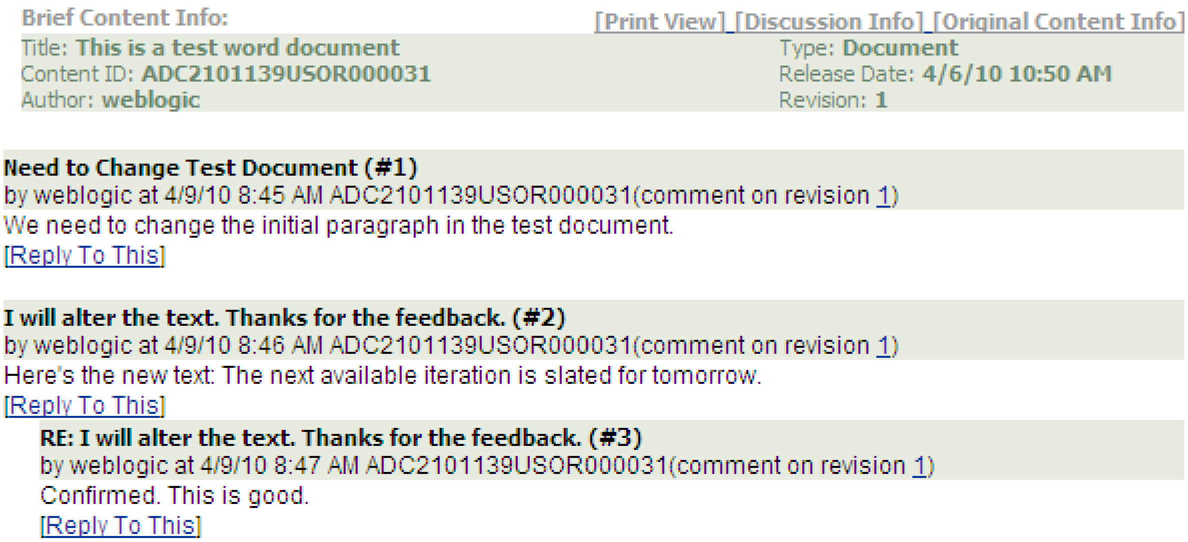


Figure 4–3 shows posts #1, #2, #3 and #4. The reply to "Change to Introduction (#1)," "RE: Change to Introduction (#3)" was made after "Change to Conclusion (#2)."

Figure 4–3 Posting Order

4.5.2 Initiating a Discussion from the Content Information Page

To initiate a discussion from the content information page of a content item you are checking in, perform the following steps:

1. From the main menu, choose **New Check In**. The Content Check-In Form opens.
2. Check in the content item with the associated criteria. On the Check-In Confirmation Page, click the **Content Info** link. The Content Information Page opens.

Note: If you have a content item that has a document name that is within one character of the database storage maximum, which is 30 by default, you cannot create a threaded discussion for it.

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3. In the Links area, click the **Create Discussion** link. The Post Comment Form opens.
4. Enter a subject for the posting in the Subject box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Form (Brief Content Info page) displays the new post.

4.5.3 Initiating a Discussion from the Search Results Page

You must be using a search results view that provides access to the **Content Actions** menu, such as the Headline or Thumbnail views. If you are using the thumbnail view, then you can click the discussion icon to access the discussion.

To initiate or enter a discussion in progress from the Search Results page, perform the following steps:

1. From the main menu, choose **Search**. The Advanced Search Page opens.
2. Enter any search metadata fields to narrow your search, and click **Search**. For example, to exclude content items that are discussions, select **Discussion Type=Not applicable**. Your search results are displayed.
3. In the **Content Actions** menu for the content you want to discuss, click the **Create Discussion** link in the popup menu. The Post Comment Form opens.
4. Enter a subject for the posting in the Subject box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Form (Brief Content Info page) displays the new post.

4.5.4 Initiating a Discussion from the Workflow Review Page

To initiate a discussion about a workflow document:

1. Open your My Content Server Tray and click the **My Workflow Assignments** link. The Workflow in Queue Page opens.
2. In the Actions column, click the **Workflow Review** icon. The Workflow Review Page opens.
3. In the Links list, click the **Create Discussion** link. The Post Comment Form opens.
4. Enter a subject for the posting in the Subject box.
5. Enter your discussion in the comment text box.
6. Click **New Post**. The Post Comment Form (Brief Content Info page) displays the new post.

4.5.5 Viewing a Threaded Discussion

Users with read permissions can view the messages within a threaded discussion, but only those who can edit the content can post messages. You can access an existing discussion from the following links:

- The **ID of the content item to discuss** link on the Content Information Page
- The **Discuss This Item** link on the Workflow Review Page or Search Results Page
- The **Web Location** link on the Discussion Info Page
- The **Content ID** link of a discussion on the Search Results Page

The Discussion link indicates how many discussion posts have been created for the document. The Discussion Count custom information field generates the number of items.

To view a discussion thread, perform the following steps:

1. Click **Search** from the navigation bar. The Advanced Search page opens.
2. Search for the discussion content you want to view. In the Discussion Type field, select **N/A**. Click **Search**. The search results are displayed.
3. In the row for the content you want to view, click the **Content Info** link or icon. The Content Information Page opens.
4. In the Links area, click the **Go to Discussion** link to go to the discussion. The Brief Content Info window opens.

4.5.6 Replying to a Posting

Use this procedure to reply to a post in a threaded discussion. When you respond to a post, a new post is created directly underneath the selected post.

To reply to a post, perform the following steps:

1. Click **Search** from the navigation bar. The Advanced Search Page opens.
2. Search for the content you want to discuss in a thread. In the Discussion Type field, select **N/A**. Click **Search**.
3. Click the Content Info link or icon. The Content Information Page with Discussion Field opens.
4. In the Links area, click the **Go to Discussion** link. The Brief Content Info window opens.
5. Beneath the post to which you want to reply, click **Reply To This**.
6. Enter your reply in the comments text box, and click **Post Reply**. Your post is added to the discussion.

4.5.7 Printing a Threaded Discussion

Use this procedure to print a threaded discussion.

1. Click **Search** from the navigation bar. The Advanced Search Page opens.
2. Search for the discussion thread. In the Discussion Type field, select **Single Content**, and click **Search**. The Search Results Page opens.
3. In the ID column of the Search Results, click the ID of the discussion thread. The ID should have an *underscore d* (**_d**) suffix. The discussion thread opens.

4. Click the **Print View** option. The discussion opens in a print view in another browser window.
5. Click the **Printer** icon or use any of the print options supported by your browser.

4.5.8 Deleting a Threaded Discussion

Use this procedure to delete a threaded discussion. You must have delete permission for the content to delete the discussion.

To delete a discussion:

1. In the Search results page, click the **Content Item info** link for the discussion you want to delete. The Discussion Info Page opens.
2. Click **OK**. A message indicates the revision has been successfully deleted from Content Server.

4.5.9 Searching with the Discussion Type Field

You can use the Discussion Type metadata field to narrow your search criteria when searching documents. The Discussion Type search field enables you to refine a search for content associated with discussions. The discussion type options are:

- **N/A**: A search applies to all documents including those without associated discussions. A search returns content both with and without a discussion, but does not return any content that is a discussion itself. That is, content IDs with an underscore "_d" are excluded from the search.
- **Single Content**: A search applies to documents that have a discussion focused on a single content item. A search using this option returns the discussion content itself (it returns only content that is a discussion). Only content IDs with an underscore "_d" are included in the search results.

> **Note:** If you do not select any criteria for Discussion Type, all content with or without discussions are displayed, including the discussion content itself.

4.6 Subscribing to New Revisions of a Content Item

This section covers the following topics:

- Section 4.6.1, "About Subscriptions"
- Section 4.6.2, "Subscribing to a Content Item"
- Section 4.6.3, "Viewing Your Current Subscriptions"
- Section 4.6.4, "Unsubscribing from a Content Item"
- Section 4.6.5, "Unsubscribing from a Criteria Group"

4.6.1 About Subscriptions

Subscriptions notify you automatically whenever a content item is revised. There are two types of subscriptions:

- Content item subscription: Users manually subscribe to individual content items.
- Criteria subscription: The system administrator sets up a subscription based on one or more metadata fields. When a user subscribes to the Criteria subscription,

they are automatically subscribed to all content items that match a particular value of those metadata fields.

For example, the system administrator sets up a criteria subscription with **Author** values as the criteria. Whenever you view a Content Information Page, you can choose to subscribe to all content items checked in by the author of the current content item.

The system administrator can subscribe users to specific content items or to criteria subscriptions, but users have the ability to cancel these subscriptions.

4.6.2 Subscribing to a Content Item

Use the following procedure to subscribe to a content item:

1. Display the Content Information Page for the content item to subscribe to.
2. Choose **Subscribe** from the **Content Actions** menu. If the item is part of a criteria group, the Subscribe To "Item" Page opens.
3. Click **Subscribe** under the Subscribe To This Item section.
4. If no e-mail address has been specified in your User Profile Page, you are prompted to enter an e-mail address for this subscription. Enter an e-mail address, and click **OK**.

4.6.3 Viewing Your Current Subscriptions

To view your current subscriptions, Open the My Content Server Tray, and click **My Subscriptions**.

4.6.4 Unsubscribing from a Content Item

Use the following procedure to unsubscribe from a content item:

1. Open the My Content Server Tray, and click **My Subscriptions**.

   The Subscriptions Page opens, listing all of your current subscriptions.
2. Choose **Unsubscribe** from the **Actions** menu under Subscription Items.

4.6.5 Unsubscribing from a Criteria Group

Use the following procedure to unsubscribe from a criteria group:

1. Open the My Content Server Tray, and click **My Subscriptions**.

   The Subscriptions Page opens, listing all of your current subscriptions.
2. Choose **Unsubscribe** from the **Actions** contextual menu under Subscription Groups.

5 Checking In Files

This chapter describes how to check in one or more content items to Oracle WebCenter Content Server and how to include watermarks and web-viewable renditions of content items.

5.1 About Manual File Check-In

Manual File Check-in is the process of submitting a file to the Content Server repository. You must have the correct permission to check a file into Content Server. The system administrator assigns permissions to users. During the check-in process, you specify metadata for your file to help identify and locate the file. You can check in files and have metadata automatically applied through your desktop application by using Oracle WebCenter Content Desktop. For more information, see "Setting Metadata To Be Remembered for Form-Based Check-ins" in *Oracle WebCenter User's Guide for Desktop*.

> **Important:** It is extremely important to know your organization's standards before you enter the metadata. The metadata helps users find the content item and determines where Content Server stores the file.

5.2 Primary and Alternate Files

When you check in a file, the native file is the *primary* file. You have the option to also specify an *alternate* file, such as the following:

- A Web-viewable version of the native file: Use this when the native file cannot be converted by Content Server, or you want to convert the native file manually.
- A file in a format that can be converted to a Web-viewable file: Use this when the native file cannot be converted by Content Server, and you have an alternate file format that can be converted by the system (such as PostScript).

- A file explaining what the native file contains: Typical uses include providing a text file that describes the contents of a compressed file (such as a ZIP file) and supplying documentation for an executable file.

For example, if you are checking in a Word document that has several graphics, you could compress the Word file and all the original graphics into a ZIP file and then check in that ZIP file as the primary file. As the alternate file, you could specify the Word document itself (which could be converted to PDF by the Content Server), a text file that describes the contents of the ZIP file, or a PDF file that you created manually.

Note: The file extension of the alternate file (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*)

5.3 Watermarks and File Check-In

This section covers the following topics:

- Section 5.3.1, "About PDF Watermark"
- Section 5.3.2, "Watermark Templates"
- Section 5.3.3, "Content Check-In Form"

5.3.1 About PDF Watermark

PDF Watermark is an optional component that is automatically installed with Content Server. If enabled, this component allows watermarks to be applied to PDF files generated by the PDFConverter component of Oracle WebCenter Content: Inbound Refinery, or to native PDF content in the `Weblayout` directory.

There are two types of watermarks: Static and Dynamic. A PDF file receives a static watermark during content check-in as a follow-on step to the Inbound Refinery conversion. Only documents that Inbound Refinery converts to PDF can receive a static watermark. After a document receives a watermark, all viewers of the document see the same watermark.

Dynamic watermarks are generated when a user requests the document for viewing or downloading and can contain variable information (for example, the user name, date, and time of download). System administrators define rules and set up specific conditions for determining which requested content gets a dynamic watermark. Different users may see the same content with different watermarks.

5.3.2 Watermark Templates

A special kind of template determines the appearance of a watermark that gets applied to a PDF document. A watermark template defines the text fields and images used for the watermark and to which pages each field and image can be applied. The template may also enforce certain security measures, such as requiring a password for viewing or printing the watermarked content. The system administrator creates and manages watermark templates.

5.3.3 Content Check-In Form

When you check in certain document formats to the system, they may be automatically converted to PDF for viewing on the Web. In such cases, you may be allowed to specify a template used to apply the static watermark.

To request that a document receive a static watermark, enter the content ID of the template to be used. Your system administrator provides you with a list of templates that are available and appropriate for your use.

5.4 Checking In Single Files

This section covers the following topics:

- Section 5.4.1, "Checking In a New File"
- Section 5.4.2, "Checking In a Similar File"
- Section 5.4.3, "Checking In a Revised File"

5.4.1 Checking In a New File

Use the following procedure to check in a new file:

1. Click the New Check In link.
2. The Content Check-In Form opens.
3. If applicable, enter a unique name in the Content ID field. Content ID values are generated automatically by Content Server if your system administrator has enabled this feature. However, you can override an automatically generated content ID by entering a new value.

   Note: If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.

   ---
4. From the Type list, select the option that best describes the file.
5. Enter a descriptive title in the Title field. The title you enter must be 249 or fewer characters in length.
6. From the Security Group list, select the security group for the content item. Keep in mind that this content item is available to users who have permission to the specified security group.
7. If accounts are enabled for your system, select an option from the Account list, or enter a new account name. Keep in mind that this content item is available to users who have permission to the specified account.
8. Specify a *primary file* in one of two ways:
   - Click **Browse** next to the Primary File field. Navigate to and select the native file, then click **Open**.
   - Enter the complete path name and file name of the native file in the Primary File field (for example, *c:/My Documents/ABC Project/MyFile.doc*).

   Tip: You can check in a metadata placeholder without specifying a primary file by entering an invalid path in the Primary File field. For example, entering the word `placeholder` into the `Primary File` field creates a content item within Content Server with the specified metadata, but no indexed primary file. Placeholders are useful for initiating workflows or making metadata available for searching and discussion.

Note: If you are checking in a placeholder using Internet Explorer version 6.0 on the Windows XP operating system with Service Pack 2 installed, the path used in the Primary File field must be valid, but end with an invalid file. In the following example, `c:/` is a valid drive, but `placeholder` is not a valid file:

```
c:/placeholder
```

If you do not specify a valid drive, an error message is displayed.

---

9. If the Format field is displayed under the Primary File field, select the conversion format for the file.
   - If you select the **Use Default** option, Content Server converts the file format based on its file name extension.
   - If you select any other option, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
10. (Optional) Specify an *alternate file* by browsing or entering the path name and file name.
    - The alternate file must have a different file extension than the primary file.
    - The alternate file is typically in a Web-viewable format or a format that can be converted to a Web-viewable file, such as *.pdf*, *.txt*, *.doc*, and so on.
11. If the Format field is displayed under the Alternate File field and you specified an alternate file, select a conversion format for the file.
    - If you select the **Use Default** option, Content Server converts the file format based on its file name extension.
    - If you select any other option, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
12. Accept the default revision in the Revision field. (You should change the revision only if there is a specific reason to do so.)
13. Enter any notes about the file in the Comments field.
14. Use the default release date, or enter a future release date in the Release Date field.
15. If you want the file to be unavailable as of a particular date, enter a date in the Expiration Date field.
16. If applicable, fill in any of your organization's custom metadata fields.
17. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the Check-In Confirmation Page opens.

Note: Depending on the type of file you checked in and how your system is configured, it may take a few minutes for the file to be converted and indexed before it is available through a search or by drilling down.

5.4.2 Checking In a Similar File

If you have a new file to check in that has similar metadata to an existing content item, you can use an existing content item as a model for the new file. The system then pre-fills metadata fields in the content check-in form with values from the "model" content item.

Use the following procedure to check in a similar file:

1. From the Check-In Confirmation Page or the Content Information Page of the existing content item, click **Check In Similar**.

   The Content Check-In Form opens. Most of the metadata fields display the same values as those assigned to the existing content item.

2. Continue with Step 3 of the procedure for Checking In a New File, changing or adding metadata values and member permissions as necessary.

5.4.3 Checking In a Revised File

Use the following procedure to check in a revised file:

1. Click the **My Content Server** tray.
2. Click **My Checked-Out Content**.

   The Checked-Out Content for User Page opens.

3. Click the **Actions** icon for the appropriate content item to display a contextual menu, and choose **Check In**. You can now check in the revised file. For details, see Section 5.4.1, "Checking In a New File."

Please note the following considerations:

- The content ID that was assigned to the original file cannot be changed.
- The name of the original file is displayed for reference; however, the revised file that you are checking is not required to have the same name.
- The revision has been incremented by one.

5.5 Checking In Multiple Files

This section covers the following topics:

- Section 5.5.1, "About Multiple File Check-In"
- Section 5.5.2, "Upload Applet Requirements"
- Section 5.5.3, "Checking In Multiple Files Using Upload"

5.5.1 About Multiple File Check-In

You can check in multiple files as a compressed ZIP file that is stored as a single content item. Checking in multiple files is useful for a variety of situations, including:

- Publishing software, such as FrameMaker: You can check in an entire book that contains multiple chapters.
- Page layout software, such as QuarkXpress: You can check in the Quark file and all its supporting files (fonts, pictures, and so on).
- CAD software, such as Solidworks: You can check in an assembly made of several files.
- Related files: You can check in a group of related files, such as a set of JPG files for a Web site.

There are two ways to check in multiple files:

- Create a compressed ZIP file *outside* of Content Server, using a compression program such as WinZip or PKZIP, then check in this ZIP file as a single file. For details, refer to Section 5.4.1, "Checking In a New File."
- Create a compressed ZIP file *within* Content Server by selecting the **Upload Multiple Files** check box in the Content Check-In Form. Checking in multiple files using this method is possible if all of the following conditions are true:
  - The system administrator has enabled the upload applet on Content Server.
  - You select the **Enable upload applet** check box in your User Profile Page.
  - You are using a Web browser that runs Java.

  For details, see Section 5.5.3, "Checking In Multiple Files Using Upload."

5.5.2 Upload Applet Requirements

You can use the upload applet to check in multiple files only if the following conditions are all true:

- The system administrator has enabled the upload applet on Content Server.
- You selected the **Enable upload applet** check box in your User Profile Page.
- You are using a Web browser that runs Java.

The upload applet requires permission to access the local drive. When you access the Content Check-In Form for the first time after enabling this applet, you may see a Java security warning:

- If your system is using the Oracle Java plug-in, when you encounter this message box, click **Run**. If you do not want to be prompted again with this message box, select **Always trust content from this publisher**, then click **Run**.
- If your system is using the Microsoft plug-in for Internet Explorer, click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Oracle**, and click **Yes**.

5.5.3 Checking In Multiple Files Using Upload

Use the following procedure to check in multiple files as a single content item in a compressed ZIP format using the upload applet:

Note: You can also check in multiple files by creating a compressed ZIP file *outside* of Content Server using a compression program such as WinZip or PKZIP, and then checking in the ZIP file as a single file. For details, see Section 5.4.1, "Checking In a New File."

---

1. Enable the upload applet in your user profile. For details, refer to Section 2.4.3, "Editing Your User Profile."
2. Follow the general procedure for Checking In a New File, Checking In a Similar File, or Checking In a Revised File.
3. Before specifying the primary file or alternate file, select the corresponding **Upload Multiple Files** check box.
4. Click the corresponding **Browse** button.

   The Upload Files Window opens.

5. (Optional) Change the default Zip Name value to a more descriptive file name. Include the *.zip* extension.
6. Select the files to be checked in.

   Use the following procedure to select files one at a time:

   a. Click **Select File**.

      The Select File Window opens.

   b. Navigate to the file to add, and click **Open**.

      The Files to Upload list displays the file.

   c. Repeat the previous two steps as necessary to select individual files.

   Use the following procedure to select multiple files at a time:

   a. Click **Select Multiple**.

      The Select Files Window opens.

   b. To select the drive where the files are located, click **Change Drive**, select the drive on the Change Drive Window, and click **OK**.
   c. Navigate to the directory or files to add. The Subdirectories list shows the contents of the directory where you are currently located. To navigate to the parent directory, double-click the "**..**" entry in the Subdirectories list.
   d. To select multiple files in the Files list:
      – To select noncontiguous files, hold down the Ctrl key, and click each file name.
      – To select contiguous files, hold down the Shift key and click the first and last file names.
   e. To narrow the selection of files, use the File Filter field. For example, the filter **.doc* selects all files with a *.doc* extension.
   f. To select all files in all subdirectories of the current directory, select the **Recurse through subdirectories** check box.
   g. To store path information (from the parent folder) with the files you are adding, select the **Include parent folder in file path** check box.
   h. Click the button appropriate to your selection: **Add Selected** or **Add with Filter**.
   i. The selected files are displayed in the Files to Upload list.
   j. Repeat these steps as necessary to add files from other directories or drives.
7. Verify that the correct files are shown in the Files to Upload list, and click **OK**.

   The ZIP file name appears in the Primary File or Alternate File field.

8. Follow the general check-in procedure to complete the check-in. For details, see Section 5.4.1, "Checking In a New File."

   If the chunking function is enabled, the Upload Message window displays a progress bar during upload.

5.6 Important Considerations

This section covers the following topics:

- Section 5.6.1, "Multibyte Characters"
- Section 5.6.2, "Content Profiles"

5.6.1 Multibyte Characters

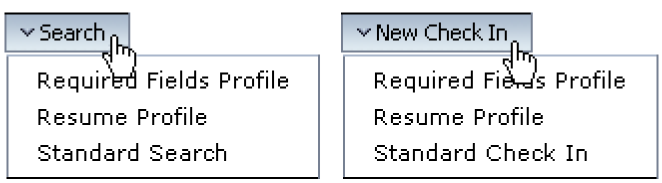
You should not use multibyte characters (for example, Japanese or Korean) in content IDs and content types, even if Content Server is to be used in a multibyte environment. The values of these fields are included in the URLs of content items, and limitations in current Web technology prevent Web servers and browsers from handling URLs with multibyte characters correctly.

To use multibyte characters in content IDs, content types, or both, you must ask your content server system administrator if the *entire* content server environment (all servers and *all* clients) runs on operating systems that support multibyte languages (for example, Japanese or Korean versions of Microsoft Windows). Otherwise, errors may occur, such as links to PDF renditions of content items not working or Dynamic Converter failing to find content items.

5.6.2 Content Profiles

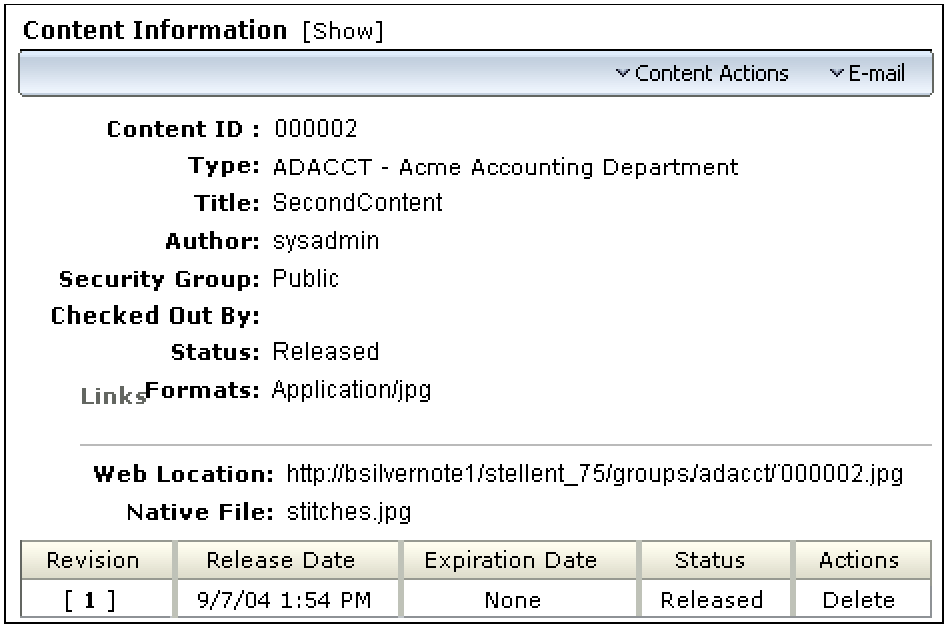
Content profiles, defined by your system administrator, determine what metadata fields are displayed and how they are grouped and titled on the associated check in, search, and information pages, based on rules established by the system administrator. By default, all content profiles are displayed as links under both the Search and New Check In lists on the Toolbar.

Figure 5–1 Content Profile Links Under the Search and New Check In Lists on the Toolbar



If you access a search or check-in page using a content profile link, you may not have access to all available metadata fields, either for searching or use when checking in a content item. Also, if you access the Content Information Page of a content item that meets criteria established by the system administrator, the initial information displayed may not be the full information available.

Figure 5–2 Content Information Page Streamlined by Content Profiles



6 Checking Out Files

This chapter describes how to check out one or more content items from Oracle WebCenter Content Server.

6.1 About Manual File Check-Out

Check-out is the process of locking a content item so that no other users can revise it. You must have write permission to the content item to check out a file or undo a check-out. Only one user at a time can check out a file; however, multiple users can continue to view the released file.

There are two approaches to checking out files manually:

- For content items that could be revised by other users, it is a good idea to check out the file as soon as you know that you must edit it to prevent other users from checking in a new revision with potentially conflicting changes.
- For content items that are unlikely to be revised by other users, you can make revisions to a copy of the file, check out the content item, and immediately check it back in with the edited file.

After you have checked out a content item, you can either check in a revision or undo the check-out.

You can check out files automatically through your desktop application by using Oracle WebCenter Content Desktop. For more information, see "Checking Out Content Files" in *Oracle WebCenter User's Guide for Desktop.*

6.2 Checking Out Single Files

Use either of the following procedures to check out a single file:

To check out single files from a Content Information page:

1. Display the Content Information Page of the content item you want to check out.
2. Choose **Check Out** from the **Content Actions** menu. The Check-Out Confirmation Page opens.
3. If applicable, click **Native File Link** to get a copy of the native file.

4. If a dialog window opens before the Save As window, choose to save the file to disk.
5. In the Save As dialog box, navigate to the location where you want to save the file, and click **Save**.
6. Start the native application (for example, Word or PowerPoint) and locate the file where you saved it in Step 5.
7. Edit the file in its native application and then save the file.

To check out single files from a Search Results page:

1. Search for content to view a search results list.
2. Choose **Headline View** or **Thumbnail View** from the **Content Actions** menu.
3. Click the **Actions** icon, and choose **Check Out** from the contextual menu. The Check-Out Confirmation Page opens.
4. If applicable, click **Native File Link** to get a copy of the native file.
5. If a dialog box opens before the Save As window, choose to save the file to disk.
6. On the Save As window, navigate to the location where you want to save the file, and click **Save**.
7. Start the native application (for example, Word or PowerPoint), and locate the file where you saved it in Step 6.
8. Edit the file in its native application, and then save the file.

6.3 Using Check Out and Open

With the Check Out and Open component, you can open content items from Content Server directly in a WebDAV-compliant native application. The Check Out and Open component is enabled by default and adds the **Check Out and Open** option to the **Item Actions** menu on a search results page and to the **Content Actions** menu on a Content Information page. Before using Check Out and Open, verify with your system administrator what WebDAV-compliant applications are in use, and that the content item you are checking out is associated with a compliant application.

This section covers the following topics:

- Section 6.3.1, "About Checking Out and Opening Content"
- Section 6.3.2, "Opening Content from Content Server"

6.3.1 About Checking Out and Opening Content

When you check out and open a content item, the content item opens in its native application if the application is WebDAV-compliant (for example, Microsoft Word). You can edit the content item and check it back into Content Server using that application. Each time you save the content item in the native application, a new revision of the item is checked in to Content Server.

Important: Pay close attention to the status of a content item you attempt to check out using Check Out and Open, both in Content Server and in the native application you are using to edit the file. If you open the file and notice that the title bar designates the file is read-only, you are prompted to save the file as a new item on a local file system.

A file is read-only if it is in a workflow process. As with a read-only file in a conventional file system, you can view the file or edit a copy as a new item. You cannot open a content item if it is checked out by another user.

Figure 6–1 Check Out and Open Option on Search Results Page

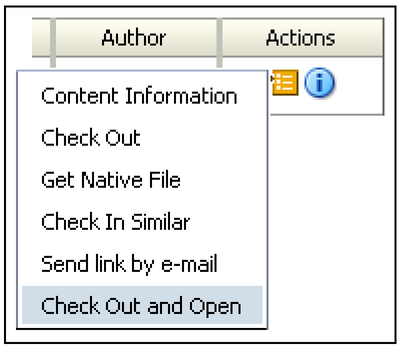
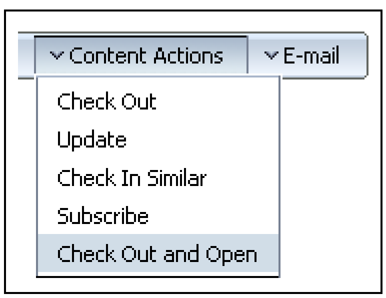


Figure 6–2 Check Out and Open Option on Content Information Page



6.3.2 Opening Content from Content Server

Use either of the following procedures to check out a single file.

To open content from a Content Information page:

1. Display the Content Information Page of the content item you want to check out.
2. Choose **Check Out and Open** from the **Content Actions** menu. The content item is checked out from Content Server transparently and opened in a WebDAV-compliant native application, such as Microsoft Word.
3. Edit the content item, save the changes and close the file. The content is checked in to Content Server as a new revision.

To open content from a Search Results page:

1. Search for content to view a search results list.

2. Choose **Headline View** or **Thumbnail View** from the **Content Actions** menu.
3. Click the **Actions** icon and choose **Check Out and Open** from the contextual menu. The content item is checked out from Content Server transparently and opened in a WebDAV-compliant native application, such as Microsoft Word.
4. Edit the content item, save the changes and close the file. The content is checked in to Content Server transparently as a new revision.

> **Note:** The Check Out and Open options are available in the **Content Actions** menu of a content item's current revision only.

6.4 Checking Out Multiple Files

This section covers the following topics:

- Section 6.4.1, "About Multiple File Check-Out"
- Section 6.4.2, "Download Applet Requirements"
- Section 6.4.3, "Download Options on Search Results Pages"
- Section 6.4.4, "Downloading Multiple Files"

6.4.1 About Multiple File Check-Out

To get copies of multiple content items, use the download applet. When you download files, you also have the option to check out the content items and uncompress any compressed ZIP files.

6.4.2 Download Applet Requirements

You can use the download applet to check out multiple files only if the following conditions are all true:

The system administrator has enabled the download applet on Content Server.

- You selected the **Enable download applet** check box in your User Profile Page.
- You are using a Java-enabled Web browser.

The download applet requires permission to access the local drive. When you run a search for the first time after enabling this applet, you may see a Java security warning:

- If your system is using the Oracle Java plug-in, when you encounter this message box, click **Run**. If you do not want to be prompted again with this message box, select **Always trust content from this publisher**, then click **Run**.
- If your system is using the Microsoft plug-in for Internet Explorer, click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Oracle Incorporated**, and click **Yes**.

6.4.3 Download Options on Search Results Pages

When the download applet is enabled, it adds the following features to search results pages.

Element	Description
Download	This link downloads the selected content items.
Select All check box	Selects all items in the search result list.
Select check boxes	Selects content items to be downloaded when you click the **Download Selected** button.

6.4.4 Downloading Multiple Files

Use the following procedure to download and check out multiple content items using the download applet:

1. Locate the files to download by drilling down the hierarchical link structure (the "Library") or by performing a search. For details, see Chapter 3, "Searching for Content Items."

   The Download Files Window opens.

2. To download all content items on the Search Results page, click **Download All**.
3. To download selected content items, select the corresponding **Select** check boxes, and click **Download Selected**.

   The Download Files Window opens.

4. Select the type of file to download: **Web Viewable** or **Native**.
5. To uncompress ZIP files during the download process, select the **Extract zip file contents** check box.
6. If you selected the **Native** option and you want to check out the content items upon download, select the **Check out file** check box.
7. In the Download Location field, enter the path where you want the files to be copied. You can click **Browse** and navigate to the directory to select it.
8. If you want a different file name for the downloaded file, change the file name in the Download Location field. This applies only to the current file. If you click **Download All**, all other files retain their default file names.
9. Click a button:
   - **Download**: to download the current file only.
   - **Download All**: to download all selected files that have not been skipped (you are not prompted for each file that was selected).
   - **Skip**: to not download the current file and go to the next selected file.
   - **Cancel**: to cancel the download.
10. If a file with the same file name exists in the target location, you are asked whether you want to overwrite it. Click a button to indicate whether you want to overwrite one or more files.

    When downloading is complete, the Download Results Summary opens.

11. Click **OK**.

7 Working with Workflows

This chapter describes workflow concepts in Oracle WebCenter Content Server and describes how to participate in and manage the workflows to which you belong.

- Section 7.1, "About Workflows"
- Section 7.2, "Participating in a Workflow"
- Section 7.3, "Viewing Workflow Information"

7.1 About Workflows

A workflow specifies how to route content for review and approval before it is released to the system. The workflow notifies users by e-mail when they have a file to review.

This section covers the following topics:

- Section 7.1.1, "Workflow Types"
- Section 7.1.2, "Workflow Steps"
- Section 7.1.3, "Postprocess Workflow Options"
- Section 7.1.4, "Workflow Process"
- Section 7.1.5, "Authentication"

7.1.1 Workflow Types

From a workflow participant's point of view, there are two types of workflows:

- A *basic* workflow defines the review process for specific content items, and must be initiated manually.
- In a *criteria* workflow, a file enters the workflow automatically upon check-in when its metadata matches predefined criteria.

7.1.2 Workflow Steps

Each workflow can include multiple review and notification steps, and multiple reviewers to approve or reject the file at each step. For each step in a workflow, a set of users and a step type must be defined. The users defined for a step can perform only the tasks allowed for that step type.

Step Type	Description
Contribution	This step is the initial step of a basic workflow. The workflow defines who the contributors are.
Auto-Contribution	This step is the initial step of a criteria workflow. There are no predefined users involved in this step.
Review	Users can only approve or reject the file. Editing is not allowed.
Review/Edit Revision	Users can edit the file if necessary and then approve or reject it, maintaining an existing revision.
Review/New Revision	Users can edit the file if necessary and then approve or reject it, creating a new revision.

7.1.3 Postprocess Workflow Options

Workflows or individual workflow steps can allow for items in review to be released into the system for indexing, searching, and viewing, even though the workflow to which they belong is not completed. For example, items in a workflow process can be made available to others not in the workflow, or a workflow can update the content information of an item without advancing the revision of that item.

7.1.4 Workflow Process

The workflow process is as follows:

- When the minimum number of reviewers for a particular step approves a revision, the revision goes to the next step in the workflow.
- If any reviewer rejects a revision, it goes back to the most recent contribution step for editing.
- When reviewers approve a revision in the last step in the workflow, the content item is released to the system.
- A basic workflow containing multiple content items can release some items in the workflow to the system before all of the revisions have completed the workflow.

7.1.5 Authentication

Workflows provide authentication options for individual steps and for the content item itself.

Depending on how your system administrator has set up the workflow, you may be required to enter your user name and password for a given step. Re-authentication associates the reviewer’s credentials with the successful completion of a step.

When you approve a revision, you also have the option of providing an electronic signature for the content item itself (not the step). The electronic signature uniquely identifies the contents of the file at a particular revision and associates the revision with a particular reviewer.

An electronic signature is a unique identifier computed from the content of the item and associated with other metadata such as the user name of the reviewer. Multiple reviewers can "sign" a particular content item revision. Modifications to the content item itself result in a different identifier. By comparing electronic signatures, Content Server can determine whether a content item has changed and whether existing approvals are valid.

For more information about electronic signatures, see Section 4.4, "Signing Content Electronically."

7.2 Participating in a Workflow

This section covers the following topics:

- Section 7.2.1, "Entering a File to a Workflow"
- Section 7.2.2, "Reviewing Revisions in a Workflow"
- Section 7.2.3, "Working with a Rejected Revision"

7.2.1 Entering a File to a Workflow

When a basic workflow starts, it sends an e-mail message to the contributors, who must check in the designated files as the first step in the workflow.

Use the following procedure to check in a file to begin a basic workflow:

1. Read the Workflow Started Notification message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items Page opens.
3. Choose **Check Out** from the contextual menu in the **Actions** column.

   The Check-Out Confirmation Page opens.
4. Check the content item into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items page.
   - Open the Content Management tray, click **Active Workflows**, click the name of the workflow, then choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items Page.
5. Fill in the content check-in form.
   - If you select the **Revision Finished Editing** check box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** check box unselected, the file is checked in but remains in Edit status instead of moving to GenWWW status. Return to Step 3 to check out the file and check it back in.

   Tip: If a document included in a workflow fails to convert in the check-in process, the content item is set to Edit status automatically. For this reason, include documents in the workflow that are valid for conversion.

   ---
6. Click **Check In** and provide user credentials if prompted.

7.2.2 Reviewing Revisions in a Workflow

When the next step in a workflow is a review step, the reviewers receive an e-mail message. When the appropriate number of reviewers approve the revision, the content item goes to the next step in the workflow.

Use the following procedure to review a file in a workflow:

1. Read the Workflow Review Notification Message.
2. Click the **Review Workflow Item** link.

   The Workflow Review Page opens, indicating the actions that you can perform.

   Note: For a reviewer step, you can choose to *Sign and Approve*, *Approve* or *Reject* the content item. For a reviewer/contributor step, you can choose to *Check Out*, *Approve*, or *Reject* the content item.

   ---

3. Review the file:
   - Review the file in the area to the right of the Workflow Review panel.
   - Click the **Web Viewable** link to see a version of the content in your browser.
   - Click the **Native File** link to save a copy of the file in its original format.
   - Click the **HTML Rendition** link to view the file as HTML in your browser.
4. If you have reviewer/contributor permission and you would like to edit the file, click the **Check out** link in the Workflow Review panel to check out the content item for editing. Otherwise, continue with Step 11.

   The Check-Out Confirmation Page opens.
5. Get a copy of the original file and edit it. For details, see Chapter 6, "Checking Out Files."
6. Check the content item back in to the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items page.
   - Open the Content Management tray, click **Active Workflows**, click the name of the workflow, then choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items page.
7. Fill in the Checked-Out Content Page.
   - If you select the **Approve Revision** box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow when the required number of reviewers approve. Step 8 is not required.
   - If you leave the **Approve Revision** box unselected, the revision is checked in but remains in Review status instead of moving to GenWWW status. You must still approve or reject the revision.
8. Click **Check In**.
9. To reject the revision, click the **Reject** link in the Workflow Review panel.

   The Reject Content Item Page opens so that you can enter a message explaining the reason for rejecting the content item. When you reject a content item, it is sent back to the most recent workflow step that permitted contribution.

10. To approve the revision, click the **Approve** or the **Sign and Approve** link in the Workflow Review panel.

    If you click **Sign and Approve**, the Sign Workflow Content Item Page opens.

11. Specify your password and any additional metadata values and click **Sign and Approve**.

    Review the information in the confirmation window and click **Close Window**.

7.2.3 Working with a Rejected Revision

When a revision is rejected, the users assigned to the most recent contribution step receive an e-mail message.

Use the following procedure to edit a file that was rejected:

1. Read the Workflow Content Item Reject Notification message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items Page opens.

3. Choose **Check Out** from the contextual menu in the **Actions** column.

   The Check-Out Confirmation Page opens.

4. Get a copy of the original file and edit it. For details see Chapter 6, "Checking Out Files."
5. Check the content item back into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items page.
   - Open the Content Management tray, click **Active Workflows**, click the name of the workflow, and then choose **Check In** from the contextual menu in the **Actions** column on the Workflow Content Items page.
6. Fill in the Checked-Out Content Page.
   - If you select the **Revision Finished Editing** box, the file moves from Review status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** box unselected, the file is checked in but remains in Review status instead of moving to GenWWW status. You must still approve the file.
7. Click **Check In**.

7.3 Viewing Workflow Information

This section covers the following topics:

- Section 7.3.1, "Workflow Information"
- Section 7.3.2, "Viewing a List of Active Workflows"
- Section 7.3.3, "Viewing a List of Your Workflows"
- Section 7.3.4, "Viewing Workflow History and Information About a Workflow Step"
- Section 7.3.5, "Viewing Content Information"

7.3.1 Workflow Information

There are several ways to view information about a content item in a workflow. With links between workflow pages you can perform the following tasks:

- Section 7.3.2, "Viewing a List of Active Workflows"
- Section 7.3.3, "Viewing a List of Your Workflows"
- Section 7.3.4, "Viewing Workflow History and Information About a Workflow Step"
- Section 7.3.5, "Viewing Content Information"

7.3.2 Viewing a List of Active Workflows

Use the following procedure to view a list of all active workflows in the system:

1. Open the Content Management tray.
2. Click **Active Workflows**.

   The Active Workflows Page opens.

7.3.3 Viewing a List of Your Workflows

Use the following procedure to view a list of workflows that require action from you:

1. Open the My Content Server Tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue Page opens.
3. To remove content items from the list, choose **Remove from Queue** from the contextual menu in the Actions column. (The content item is not deleted from the workflow.)

7.3.4 Viewing Workflow History and Information About a Workflow Step

Use the following procedure to view workflow history and information about a workflow step:

1. Display either the Workflow Content Items Page or the Workflow in Queue Page.
2. Choose **Workflow Info** from the contextual menu in the Actions column.

   The Workflow Info For Item Page opens.

7.3.5 Viewing Content Information

Use the following procedure to view content information for a revision in a workflow:

1. Open the My Content Server Tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue Page opens.
3. Choose **Content Info** from the contextual menu in the Actions column.

   The Content Information Page opens.

8

Managing Content with Folders and WebDAV

This chapter describes how to use alternative folder and WebDAV interfaces, similar to a conventional file system, to organize and manage some or all of the content in Oracle WebCenter Content Server.

8.1 Introduction

Content Server includes components that provide a hierarchical folder interface, similar to a conventional file system, for organizing and managing some or all of the content in the repository.

- Folders: This component (FrameworkFolders component) provides a hierarchical folder interface within the browser, similar to a conventional file system, for organizing, locating, and managing repository content and content item metadata. The Folders functionality is installed but disabled by default. Folders is a scalable, enterprise solution and is intended to replace the earlier Contribution Folder interface.
- Contribution Folders: This optional component (Folders_g component) provides a hierarchical folder interface within the browser, similar to a conventional file system, for organizing repository content. The component is installed but disabled by default. The newer, Folders component is meant to be a replacement for Contribution Folders.

> **Note:** Running both Folders and Contribution Folders is not a supported configuration. Content in Contribution Folders should be migrated to the Folders interface. For more information about migrating Contribution Folder content, see the *Oracle WebCenter Content System Administrator's Guide for Content Server*.

- WebDAV (Web-Based Distributed Authoring and Versioning): Both folder components work with Content Server's built-in WebDAV functionality to allow users to remotely manage and author content using clients that support the WebDAV protocol. The WebDAV interface provides a subset of the options available through the browser interface. In general, you can create, delete, move, and copy both folders and content items, and you can modify and check in content items. To check out content items through the WebDAV interface, you must use a WebDAV client that can open the file. To perform other management tasks, such as specifying or propagating metadata values, you must use the standard browser interface.

Oracle also offers Oracle WebCenter Content: Desktop, which can enhance the WebDAV client environment by more closely integrating with Windows Explorer, Microsoft Outlook, Lotus Notes, and other applications. For more information see the *Oracle WebCenter User's Guide for Desktop*.

This section covers the following topics:

- Section 8.1.1, "Browsing to Content"
- Section 8.1.2, "About Folders"
- Section 8.1.3, "About Contribution Folders"
- Section 8.1.4, "About WebDAV"

8.1.1 Browsing to Content

This section covers the following topics:

- Section 8.1.1.1, "Browse Content Tray"
- Section 8.1.1.2, "Browsing Content to Find a File"

8.1.1.1 Browse Content Tray

Browsing content in Content Server is similar to looking for a paper document in your organization's file cabinets. In a file cabinet, you find the file drawer, then the folder, then the document. In Content Server, you find documents and links to Web sites in folders in the Browse Content tray.

The Browse Content tray is a hierarchical link structure (the *Library*), where metadata define the folders in the hierarchy. The folder, `Library Folders`, is set up by default. Your system administrator determines the hierarchy of any folders within `Library Folders`. Click the plus sign (**+**) next to a collapsed folder to expand the contents of the folder. Click the minus sign (**–**) next to an expanded folder to collapse it.

Click a link in the last folder of a hierarchy to display:

- A list of content items that match the folder's metadata and that you have permission to view
- A Web site
- A report that provides information about content items, users, metadata fields, or other content server elements.

8.1.1.2 Browsing Content to Find a File

Use the following procedure to find information by browsing content:

1. Click Browse Content Tray to expand the tray.
2. Scan the list of folders until you find the one you are looking for.
3. Click the plus sign (**+**) next to the folder to expand the folder contents and continue drilling down through the folders until you reach a link to the following:

- A Search Results Page
- A different Web site
- A content server report

8.1.2 About Folders

Folders is an optional component (Framework Folders component) for use with Content Server that, when enabled, provides a hierarchical folder interface, similar to a conventional file system, for organizing and locating some or all of the content in the repository.

Folders is a scalable, enterprise solution and is intended to be a replacement for the earlier Contribution Folders component. Some of the benefits that Folders provides include:

- No practical limits on the number of folders or files (content items) in the Folders interface
- Default metadata for content items added to a folder
- Metadata inheritance for newly created folders
- Metadata propagation for new or modified metadata values
- Query-based folders for dynamically retrieving content items from the repository
- Query-based retention folders for specifying basic retention rules for the items returned by the query
- Folder-level security using the standard Content Server security model
- Integration with the WebDAV interface for local folder and file authoring and management
- Integration with Oracle WebCenter Content: Desktop for enhanced local folder and file authoring and management

This section covers the following topics:

- Section 8.1.2.1, "The Folders Interface"
- Section 8.1.2.2, "Folders and Files"
- Section 8.1.2.3, "Shortcuts"
- Section 8.1.2.4, "Query Folders and Folder Search"
- Section 8.1.2.5, "Folders Retention"
- Section 8.1.2.6, "Personal Folder"
- Section 8.1.2.7, "Security and User Access"
- Section 8.1.2.8, "Content Item Versioning"
- Section 8.1.2.9, "Folder and Content Item Metadata"
- Section 8.1.2.10, "Migrating Contribution Folder Content"

8.1.2.1 The Folders Interface

The Folders hierarchy is accessible through both the standard content management pages and the WebDAV interface.

The familiar folder and file model provides a framework for organizing and accessing content stored in the repository. Functionally, folders and files are very similar to those in a conventional file system. You can copy, move, rename, and delete folders and files. You can also create shortcuts to folders or files so you can access a content item from multiple locations in the hierarchy.

You can think of the files in the Folders interface as symbolic links or pointers to content items in the repository. The operations you perform in the Folders interface, such as searching or propagating metadata, effectively operate on the associated content items.

8.1.2.2 Folders and Files

As with a conventional file system, Folders offers a convenient way to organize content. Users can easily view the relationship between folders and subfolders and can browse to a group of content items.

Using Folders, users can perform the following actions with the privileges defined by Content Server's standard security model:

- Browse to locate content items for check-in, check-out, and to view and change folder and item information.
- Create new folders and subfolders.
- Create new content items in a folder or add existing repository content to a folder.
- Add shortcuts to folders or content items in one or more locations. Shortcuts act as placeholders for the referenced content item.
- Move or copy folders or files to other locations.
- Rename a folder or file.
- Remove a file from the folders hierarchy. This does not affect the associated content item.
- Delete a folder or file. When you delete a folder or file, the folder or file and any shortcuts to it are removed from the folders hierarchy. Any content items associated with the files are set to *expired* in the repository.
- Create a query folder that contains content items returned by the query associated with the folder. For more information about query folders, see Section 8.1.2.4, "Query Folders and Folder Search."
- Create a retention query folder and assign retention rules for the content items returned by the query. For more information about query folders and retention scheduling, see Section 8.1.2.5, "Folders Retention."
- Assign folder security and default metadata values for content items created in the folder. You can also propagate specified metadata values to the contents of a folder or block propagation for a given folder. For more information, see Section 8.1.2.9, "Folder and Content Item Metadata."

The Folders interface follows several conventions familiar to users of file systems:

- Use standard Windows naming conventions when creating folders. Do not use special characters such as the forward or backward slash characters or the double quote character.
- Content Server can store multiple files of the same name as separate content items. However, in the Folders interface, file names in a given folder must be unique (in the same way that a folder in Windows cannot contain two files with the same name).

8.1.2.3 Shortcuts

With Folders, you can reference the same folder or content item in multiple locations using shortcuts that act as placeholders for the referenced folder or file. You can create shortcuts to folders or files to help you locate and manage the target content items within the folder hierarchy.

8.1.2.3.1 Folders and Shortcuts Folders and folder shortcuts are identified with different icons:

Icon	Description
	Folder: Folders can contain other folders, content items, and shortcuts to other folders and content items. Folders are identified by a standard folder icon.
	Folder Shortcut: A folder shortcut includes the contents of the associated folder in the hierarchy at the point where the shortcut is stored. Folder shortcuts are identified by a folder icon with an arrow and can reference either a folder or a query folder. Folder shortcuts are excluded from metadata propagation actions.
	Query Folder: The contents of a query folder are the repository content items returned by the query associated with the folder. Query folders are identified by a folder icon with a magnifying glass.
	Retention Query Folder: Similar to a query folder, the contents of a retention query folder are the repository content items returned by the query associated with the folder. You can additionally specify retention rules for the content items returned by the query. Retention query folders are identified by a folder icon with a magnifying glass and a clock.

8.1.2.3.2 Content Item Links You can think of content items in the Folders interface as links to items in the repository. There are two types of links for content items:

Icon	Description
	File (primary link): There can be only one primary link to a content item in the Folders interface. The primary link represents the content item in the repository and is identified by a standard document icon. In most respects, working with a file (or primary link) is the same as working directly with the content item in the repository. For example, if you delete a file, the status of the associated content item in the repository is set to "expired."
	Shortcut (secondary link): There can be any number of file shortcuts in the Folders interface to an associated content item. A file shortcut is identified by a document icon with an arrow indicating that it is a reference to the actual content item. Shortcuts are excluded from metadata propagation actions. Changes you make by means of the shortcut (such as metadata changes) are made to the underlying content item. Changes you make to the shortcut itself (such as deleting the shortcut) do not affect the underlying content item.
	Query result: The contents of a query folder are the repository content items returned by the query associated with the folder. Query content items are identified by a document icon with a magnifying glass.

8.1.2.4 Query Folders and Folder Search

A query folder functions much like a saved search; each time you access the folder, you initiate the query associated with the folder. The contents of a query folder are the content items returned by the query. The contents of query folders can change dynamically as the contents of the repository change.

Query folders contain the actual repository content items returned by the query. That is, folders and shortcuts are not included in the contents of query folders.

With the contents of a query folder, you can copy the associated content items, view and update metadata information for individual items, or propagate metadata changes through all items in the query folder.

Folders also expands the standard search results options to include the **Create Query Folder** option to save a search query as a query folder. For more information, see Section 8.2.4.2, "Save a Search as a Query Folder."

To search for folders or files from within in the Folders hierarchy, use the options in the Search menu in a given folder. You can search any or all folder metadata fields to find folders or files within the folders hierarchy that match the specified search criteria. For more information about folder metadata, see Section A.10.5, "Folder Editing Form."

8.1.2.5 Folders Retention

With Folders, you can perform basic content retention scheduling by creating a retention query folder, assigning retention attributes to the folder, and then configuring the retention schedule. You can assign retention rules based on the age of the content item or on the number of revisions. If you have a license for Oracle WebCenter Content: Records, you can also define retention rules based on categories defined in Records.

You must be an administrator to specify retention rules or schedules. For information about specifying retention scheduling, see the *Oracle WebCenter Content Application Administrator's Guide for Content Server*.

Considerations

The following considerations apply to retention query folders:

- Retention rules are associated with the retention query folder but are stored separately from the standard folder metadata. For this reason, you cannot search for a query folder based on the folder's retention attributes.
- Unlike standard query folders, retention query folders search only database values and cannot perform full-text searches even if full-text search is supported on your system.
- If you specify multiple retention rules for a particular retention query folder, all the rules must be satisfied for the disposition to occur. For example, if you specify the age as 1 calendar year and the number of revisions to keep as 3, only those items that are more than 1 year old and that are older than the last three revisions are deleted.
- Different queries can include the same content item in their results. In this case, the retention rules for each retention query folder are applied independently from one another. For example, if one query folder specifies the number of revisions to keep as 2 and another specifies the revisions to keep as 3, only two revisions of the item are retained.
- Folders retention is treated differently than that in Oracle WebCenter Content: Records. When using Records, if multiple delete actions are called, the retention with the longest interval is used. In Folders, the shortest interval always runs first.

Considerations with Oracle WebCenter Content: Records

If you use both Folders and Oracle WebCenter Content: Records on the same system, the following additional considerations apply:

- If you have Records installed, it is possible to have two retention schedules (as well as multiple rules) for the same item. If a content item has retention rules defined in both Content Server and in Oracle WebCenter Content: Records, only the retention and schedule defined by the Records system are used.

- If you have Records installed with a level of DoD Baseline or higher, retention query folder options are not available in the Content Server interface. Any existing retention query folders retain their icon and (inactive) retention attributes, but function as a standard query folder.

  If the level is then set to Standard or lower, then retention query folder options are enabled in Content Server and the rules for any existing retention query folders become active.

8.1.2.6 Personal Folder

In the root folder of the Folders hierarchy is a Users folder that contains a folder defined for you as an authenticated user. You can create subfolders and content items in the same way you do with other folders in the hierarchy. Your personal folder, however, is visible only to you. Every authenticated user can have a personal folder.

Note: You can only add folders and content items to your personal folder. Changes you make within the /Users folder are not maintained.

Folders provides menu options to quickly add folders, files, and shortcuts to your personal folder, referred to in menus as **Add to My Folder**.

To access your personal folder, click **My Content Server** in the trays area and then click **My Folders**.

8.1.2.7 Security and User Access

Users can create and edit folders, shortcuts to folders, and links to documents as allowed by Content Server's standard security model. Folders are assigned security attributes in the same way they are assigned to content items, including security group, account, and Access Control List attributes, if enabled.

By default, folders inherit the security settings and other default metadata defined for the parent folder. You can, however, explicitly set security and metadata values for a given folder and propagate those values to folders and content items within the folder.

8.1.2.8 Content Item Versioning

You can check out content items and check in new versions of those content items through the Folders interface in much the same way you do through the standard content management pages. When you view or edit the metadata information for a particular content item, you can choose menu options to check out the item and then check in a new version of that item.

Folders provides two modes for viewing content item versions:

- Published Items (consumption mode): The latest released revisions of documents are displayed. These are the same revisions that are returned in search result listings.
- All Items (contribution mode): The latest revision of each document is displayed, regardless of its state. These can include the revisions of documents that are still in workflow.

As a user, you can switch between the two modes to see released content items only or to see content items that require work before being released. The selection you make remains in effect until you explicitly change it.

8.1.2.9 Folder and Content Item Metadata

Every folder has a set of metadata values that can be applied to content items added to the folder. You can configure folders to enforce metadata rules on their content items or allow any or all values to be modified. For example, a folder could be configured to enforce 'Secure' as the value for the Security Group metadata field. Then, when a content item is added to that folder, the Security Group value automatically updates to Secure.

Folders inherit the default metadata assigned to their parent folders unless the folder is explicitly configured otherwise. Subsequent changes to a parent folder's metadata do not affect the metadata for existing subfolders unless explicitly propagated down through the hierarchy.

Folder metadata inheritance and propagation make it easy to apply metadata to content items. Whether you are an administrator managing all folders and files or a user managing your own folders and files, it is a good idea to plan your metadata strategy before you start creating folders and adding content items. Your strategy should include the following basic steps:

1. Determine whether specific folders or branches in the hierarchy have unique metadata requirements and how best to identify and manage those requirements.
2. Determine which metadata fields (if any) a user should specify when adding or checking in a content item through a particular folder.
3. Determine which metadata fields (if any) should have a default value or an enforced value for a particular folder.
4. Determine which subfolders (if any) are eligible to be changed when propagating metadata through a folder.
5. Determine whether to use profiles to manage metadata requirements. An administrator can create one or more profiles to organize, selectively display, and control access to metadata fields based on rules associated with the profile.

8.1.2.9.1 Default Metadata Default metadata values are automatically applied to new content items created in or checked in to a folder. To modify the default metadata values for a folder, you must have Delete permission to the folder or be the Author and have Write permission.

If default values are not provided for all required fields, you are prompted to provide them when you create or check in the content item. If the folder has the **Prompt for Metadata** option selected, you are prompted to provide metadata values for the item rather than relying on the folder’s default metadata settings.

Default metadata values are also used as the default values when propagating metadata.

8.1.2.9.2 Metadata Propagation With proper permissions, you can propagate metadata values from a folder to its subfolders and content items. To propagate metadata to the content items in a particular folder, you must have Write permission for the folder and the content items themselves. To propagate to any folders below the folder in the hierarchy, you must have Delete permission the folders.

Content items in a folder do not necessarily have the same security settings. To propagate metadata to content items, you must also have Write permission for the content item. To restrict changes to folders only, you can optionally select the **Propagate To Folders Only** option.

When you propagate metadata, you select the metadata fields and can specify the values to propagate from the metadata available for the current folder. You can propagate any metadata value that you can change. For example, you can propagate the Security Group or Owner values, but you cannot propagate the Content ID. You can also propagate a blank field, such as the Comment or Expiration Date fields, to clear the associated values from content items.

You can configure folders to prevent propagation by selecting **Inhibit Propagation** in the folder information for that folder. You can optionally override a folder's inhibit setting using the **Force Propagation** setting on the Propagate window. For more information about propagation, see Section 8.2.2.3, "Propagate Folder Metadata."

8.1.2.9.3 Metadata Profiles An administrator can create sets of metadata as one or more profiles that the administrator or other users can easily apply to folders when specifying folder defaults or when propagating metadata. For more information about using profiles, see the *Oracle WebCenter Content Application Administrator's Guide for Content Server*.

8.1.2.10 Migrating Contribution Folder Content

If you have content in an existing Contribution Folders hierarchy (folders_g component) and want to migrate the folders and files to the Folders interface, you can use the Folders Migration utility to replicate the folder hierarchy and selectively migrate folder content. For more information about the Folders Migration Utility, see the *Oracle WebCenter Content System Administrator's Guide for Content Server*.

8.1.3 About Contribution Folders

Contribution Folders is an optional component for use with Content Server that, when enabled, provides a hierarchical folder interface to content in Content Server in the form of *contribution folders*. With contribution folders, you can create a multilevel folder structure.

Users can use the familiar folder and file interface to organize and manage content items. Users can create, delete, copy, and move content items. Users can check content items in, and out, and apply default metadata to content items by checking them in through a particular folder.

8.1.3.1 Content Item Security

The user logins and security controls in Content Server also apply to content that you manage through contribution folders. For example, if you have Read permission for a content item, you are able to view the file, but you are not able to check in a revision to the file.

8.1.3.2 Folder Metadata Inheritance

When you create a new folder, the metadata from the parent folder populates the fields for the new folder. The folder initially *inherits* metadata, but you can change its values without affecting the parent folder. A folder has the same metadata as a content item.

Subsequent changes to a parent folder's metadata do not affect the metadata for existing subfolders. To apply a parent folder's metadata to subfolders and content items, you can use the metadata propagation function. For more information, see Section 8.1.3.5, "Metadata Propagation."

8.1.3.3 Default Metadata Values

When a file is checked in to Content Server through a contribution folder, default metadata values are entered on the content check-in form automatically. Default metadata values are evaluated in the following order:

1. Contribution folder default values: When you choose **New Folder** from the **New Item** menu, any content default metadata values defined for that contribution folder are entered on the content check-in form. These values are defined on the Hierarchy Folder Configuration Page.

2. User default metadata values: If any content metadata defaults are not defined for the contribution folder, the user's default metadata values are applied. These values are defined by each user for new content items on their Default Information Field Configuration Page, and for revised content items on their Revision Information Field Configuration Page.

   Important: User default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server Web interface.

3. System default metadata values: The system default values are applied to any fields that are not defined by the contribution folder or the user's default metadata. These values are defined by the system administrator.

   Important: System default metadata values are only applicable when creating new content items using WebDAV. They are not applicable when using the Content Server Web interface.

4. None: You can leave a metadata field blank if it is not a required field. If you leave a required field blank, an error occurs and the content item is not checked in.

8.1.3.4 Trash Bin

The *Trash Bin* function is an optional feature that sends deleted items to a Trash folder, rather than permanently deleting the items. Items in the Trash folder can then be permanently deleted or restored to their original location in the folder hierarchy. This enables users to recover files and folders that have been mistakenly deleted.

Please note the following considerations for the Trash Bin feature:

- The Trash folder works much like a normal folder except that items deleted from the Trash folder are permanently deleted. For more information, see Section A.9.8, "Trash Exploring Page."
- Deleting a revision from a content information page bypasses the Trash folder and permanently deletes the revision.
- Users can select whether to make use of the Trash folder or permanently delete items immediately. They can also select whether to see all deleted items in the Trash folder or just the items they deleted themselves. For more information, see Section A.9.4, "Folder Configuration Page."
- Deleting an item from the Exploring page puts the item into the Trash folder.
- Deleting an item from WebDAV puts it into the Trash folder.

8.1.3.5 Metadata Propagation

The *metadata propagation* function enables contributors to copy default metadata values from a folder to its subfolders and content items. Typical uses for this function include:

- After moving a large number of content items to a new folder structure, you want to apply the top-level folder's default metadata to all subfolders and content items.
- You revised the default metadata for a folder, and you want to apply it to subfolders and content items within that folder.

Note the following considerations for metadata propagation:

- The propagation function applies each folder's metadata to all "uninhibited" subfolders and content items within those folders. Each uninhibited subfolder and content item inherits the metadata of the folder from which propagation was launched.
- When you inhibit a folder, it is not affected by metadata propagation from a higher-level folder. However, you can still launch metadata propagation *from* an inhibited folder.
- The system administrator selects which metadata fields are included in propagation. (This setting is systemwide.) By default, no metadata fields are included until they are specifically selected for metadata propagation.
- If a folder metadata field does not have a value defined, subfolders and content items within that folder may not inherit the "blank" value during propagation and any existing metadata values may stay intact for these items. The system administrator specifies how the system handles blank fields.
- When you launch metadata propagation, only folders and content items for which you have Write permission to the security group are affected.

8.1.3.6 Folder Content Item Revisions

When documents are edited and checked in to Content Server, the revised document must be converted, indexed, and released. Before this process is complete, the system considers the revised document to be the "latest" version. After the process is complete, the system considers the revised document to be the "latest released" version.

Depending on how Folders has been set up, users with read access to the content item see either the latest version or nothing at all if the item is not released. Authors, however, always see the latest version. By default, the latest version is available to all users with read access.

8.1.4 About WebDAV

WebDAV (Web-Based Distributed Authoring and Versioning) provides a way to remotely author and manage your content using clients that support the WebDAV protocol. For example, you can use Microsoft Windows Explorer to manage content in the repository rather than using the browser interface.

8.1.4.1 What is WebDAV?

WebDAV is an extension to the HTTP/1.1 protocol that allows clients to perform remote Web content authoring operations. The WebDAV protocol is specified by RFC 2518.0. For more information, see the WebDAV Resources Web site at

`http://www.webdav.org`

When a content management system such as Oracle WebCenter Content uses WebDAV, the WebDAV client serves as an alternate user interface to the native files in the content repository. The same versioning and security controls apply, whether an author uses the Web browser interface or a WebDAV client.

The WebDAV interface provides a subset of the options available through the browser interface. In general, you can create, delete, move, and copy both folders and content items, and you can modify and check in content items. To check out content items through the WebDAV interface, you must use a WebDAV client that can open the file. To perform other management tasks, such as specifying or propagating metadata values, you must use the standard browser interface.

You can use the WebDAV interface in Content Server with either the Contribution Folders interface or the Folders interface. For more information about the Contribution Folders interface, see Section 8.1.3, "About Contribution Folders." For more information about the Folders interface, see Section 8.1.2, "About Folders."

8.1.4.2 WebDAV Clients

A WebDAV client is an application that can send requests and receive responses using the WebDAV protocol. With a WebDAV client, you can check content out of the e Content Server repository, modify the content item, and check in a new revision using the native application menus.

You can use WebDAV folders in Windows Explorer to manage files that are created non-WebDAV application, but you must check content out of the Content Server repository using the Content Server browser interface rather than the native application.

8.1.4.3 Oracle WebCenter Content: Desktop

Oracle WebCenter Content: Desktop provides a set of embedded applications that help you seamlessly integrate your desktop experience with the WebDAV-based Content Server repository. Desktop provides convenient access to Content Server directly from Microsoft Windows Explorer, Microsoft Office applications (Word, Excel, and PowerPoint), and supported e-mail clients (Microsoft Outlook and Lotus Notes). Integrating Content Server with your desktop applications improves your ability to work with files on Content Server. You can easily manage files on the server and share files with other users directly from your desktop in addition to logging in to Content Server and using the Web browser interface. For more information about Desktop, see *Oracle WebCenter User's Guide for Desktop*.

8.2 Working with Folders

Folders provides a hierarchical folder interface, similar to a conventional file system, for organizing and locating some or all of the content in the repository.

This chapter provides information about using Folders. It covers the following topics:

- Section 8.2.1, "Folder Navigation"
- Section 8.2.2, "Working with Folders"
- Section 8.2.3, "Working with Content Items"
- Section 8.2.4, "Working with Search Options and Query Folders"
- Section 8.2.5, "Folder Access Example"

8.2.1 Folder Navigation

To view the folder hierarchy, click **Browse Content** in the trays area and click **Folders**. The Browse Content tray shows a tree view of the folder hierarchy. The basic hierarchy includes standard folders, such as the Users folder and any other folders created by your administrator.

To expand or collapse a particular level in the folder hierarchy, click the plus or minus icon next to the folder name in the Browse Content tray. To view the contents of a folder, click the folder name.

Note: Individual folders are displayed only if you have Read privileges for that folder.

When you open a folder, its contents are displayed in the folder content area with folders in the top portion and content items in the bottom portion. Page menus provide options for adding folders and content items and for managing the current folder. Folder content menus provide options for managing selected items (folders or content items) in the current folder. Individual folder and content item menus provide options for managing the associated item.

The path to the current folder is displayed at the top of the page. You can click any folder in the path to open the contents of that folder.

8.2.2 Working with Folders

Working with folders in the Folders interface is similar to working with folders in a conventional file system. You can copy, move, rename, and delete folders and files. You can also create shortcuts to folders or files so you can access a content item from multiple locations in the hierarchy. Additionally, you can use folder to apply and manage metadata for the content items contained in the folder.

This section covers the following topics:

- Section 8.2.2.1, "Create a Folder"
- Section 8.2.2.2, "Specify Default Folder Metadata"
- Section 8.2.2.3, "Propagate Folder Metadata"

For information about copying or moving folders, see Section 8.2.3.4, "Copy or Move Folders and Files." For information about deleting folders, see Section 8.2.3.6, "Delete Folders and Files."

8.2.2.1 Create a Folder

This procedure shows you how to do the following:

- Create a folder
- View and change folder information
- Rename a folder

1. Navigate to the folder where you want to create the new folder. You must have write permission in the folder where you want to create the new folder.
2. Choose **New Folder** from the **Add** menu on the folder page. The Folder Creation Form opens.
3. Specify a name for the folder.

Use standard Windows naming conventions when naming folders. Do not use special characters such as the forward or backward slash characters or the double quote character.

4. To specify **Additional Fields**, click **show advanced options** if the fields are not displayed.
5. Choose an **Owner** for the folder from the list of defined users. By default, the current user is the owner.
6. Choose a **Security Group** from the list of defined security groups. By default, the folder uses the security group of its parent folder.
7. To prevent the folder from having its metadata modified unintentionally, select **Inhibit Propagation.**

   You can override this setting by selecting Force Propagation during metadata propagation. For more information, see Section 8.2.2.3, "Propagate Folder Metadata."
8. To prompt the user to specify metadata rather than relying on the folder's default metadata settings when they create new content items in the folder select **Prompt For Metadata.**
9. Click **Create**. The folder page shows the new folder and its associated Actions menu.

   If a folder with the specified name already exists in this location, the newly created folder is named *Copy of <name>*.
10. To rename the folder, choose **Rename** from the folder Actions menu, specify the new name and click **OK**.

    Use standard Windows naming conventions when naming folders. Do not use special characters such as the forward or backward slash characters or the double quote character.

    For more information about copying and moving folders, see Section 8.2.3.4, "Copy or Move Folders and Files."
11. To change other metadata values, including the name, choose **Update Folder Information** from the folder Actions menu, change the values outlined in the steps above and click **OK**.

    To change metadata values for the folder when you are viewing the contents of the folder, choose **Folder Information** from the **Edit** menu on the page. For more information about folder metadata fields, see Section A.10.5, "Folder Editing Form."

8.2.2.2 Specify Default Folder Metadata

This procedure shows you how to define default metadata values to apply to new content items added to a folder. Default metadata values are also used as the default values when propagating metadata.

To change folder metadata, you must have Delete permission for the folder or be the Author and have Write permission.

1. Click **Browse Content** in the trays area, then locate and open the folder for which you want to define default metadata.
2. From the page Edit menu, choose **Metadata Values**. The Editing Default Metadata Values page opens.

3. Specify the metadata values you want to apply to new items added to the folder.

   These values apply only to new repository content items. They are not applied to content items defined in the repository when they are added to a folder. Although you can modify the values before propagation, these values also act as the default values for propagation (described later in this section). For more information about specific metadata fields, see Section A.7.1, "Content Check-In Form."

4. Click **Save**.

8.2.2.3 Propagate Folder Metadata

This procedure shows you how to propagate metadata values to the items in a query folder or to a folder and its subfolders.

To change folder metadata, you must have Delete permission for the folder or be the Author and have Write permission. To change content item metadata, you must have Write permission for the content item.

> **Note:** Depending on the contents of a folder, propagation can change metadata values for a significant number of folders and content items. Before you begin, make sure you know what the consequences of propagation are.

1. Click **Browse Content** in the trays area, then locate and open the folder or query folder in which you want to propagate metadata.
2. From the page Edit menu, choose **Propagate**. The Propagate page opens.

   The fields on the Propagate page are initially populated with the metadata values defined for the folder. Query folders show general defaults.

3. Select the check box next to a field you want to propagate.
4. If necessary, specify the value to propagate in the associated field. If you propagate an empty field, it clears the field for all affected items.

   For more information about specific metadata fields, see Section A.7.1, "Content Check-In Form."

5. Repeat steps 3 and 4 for each field you want to propagate.
6. To exclude content items and propagate metadata changes to subfolders only, select **Propagate To Folders Only**.
7. To override the Inhibit Propagation setting specified for all subfolders, select **Force Propagation**.

   > **Caution:** Propagation is recursive through all subfolders in the propagation folder. Propagation can change metadata values for a significant number of folders and content items. Use caution when propagating metadata and when using the **Force Propagation** option in particular.

8. Click **Propagate**.

8.2.3 Working with Content Items

Working with content items in the Folders interface is similar to working with files in a conventional file system, except that the "files" represent content items stored in the repository.

This section covers the following topics:

- Section 8.2.3.1, "Add a New Content Item to a Folder"
- Section 8.2.3.2, "Add an Existing Content Item to a Folder"
- Section 8.2.3.3, "Create a Folder or File Shortcut"
- Section 8.2.3.4, "Copy or Move Folders and Files"
- Section 8.2.3.5, "Check Out and Check in Files"
- Section 8.2.3.6, "Delete Folders and Files"

8.2.3.1 Add a New Content Item to a Folder

To check in a new content item through the folder interface, perform the following steps:

1. Navigate to the folder to which you want to add the content item.
2. Choose **New Content Item** from the page Add menu. The Content Check-In Form opens.
3. Provide metadata information as necessary. The form is populated with the default metadata values defined for the enclosing folder. Required fields are indicated with an asterisk (*).

   For more information about checking content items, see Section 5.4.1, "Checking In a New File." For more information about the metadata fields themselves, see Section A.7.1, "Content Check-In Form."
4. After you enter all the appropriate metadata values, click **Check In**.

   If the check-in is successful, and you are working with published items only, the Check-In Confirmation Page opens. If you are working with all items, the new revision is added to the list of available revisions.
5. The content item is checked in and is represented by a file in the current folder. The name of the file in the folder is the name of the native file you checked in.

   If an item with the specified name already exists in this location, the newly created folder is named *Copy of <name>*.
6. To rename the file, choose **Rename** from the file item menu. To change other metadata, choose **Update Content Information** from the file item menu.

8.2.3.2 Add an Existing Content Item to a Folder

To add a content item that is already in the repository to the folders interface, perform the following steps:

1. Navigate to the folder to which you want to add the content item.
2. Choose **Existing Content Item** from the page Add menu. The Add Existing Content Item window opens.
3. Provide metadata search information to locate the content item using any of the supported forms.

For more information about the expanded search form, see Section 3.1.4, "Advanced Search Page." For more information about the query builder form, see Section 3.1.5, "Query Builder Form."

4. After you enter all the appropriate metadata values, click **Search**.
5. The Search Results page displays the repository content items, if any, that match your search criteria. To add an item to the folder hierarchy, click **Select** next to the associated item.

   If the **Select** button is not available for a particular item, it is because there is already a file representing the item in the folder hierarchy.
6. The content item is represented by a file in the current folder. The name of the file in the folder is the name of the native file you checked in.

   If an item with the specified name already exists in this location, the newly created folder is named *Copy of <name>*.
7. To rename the file, choose **Rename** from the file item menu. To change other metadata, choose **Update Content Information** from the file item menu.

8.2.3.3 Create a Folder or File Shortcut

To create a shortcut to a target folder or file listed in the current folder and store the shortcut in a selected destination folder, perform the following steps:

1. Navigate to the folder that contains the folder or file for which you want to create a shortcut.
2. Choose **Create Shortcut** from the folder or file item menu. The Create Shortcut Window opens.
3. **Browse** to the destination folder where the shortcut will be stored and select the folder.
4. Verify the selected path in the Folder box at the bottom of the page and click **OK**.
5. Specify a name for the shortcut.

   Use standard Windows naming conventions when creating folders and files. If a shortcut with the specified name already exists in this location, the newly created shortcut is named *Copy of <name>*.
6. Click **OK**. If the shortcut is successfully created in a destination folder other than the current folder, click **Yes** to view the destination folder and click **No** to return to the current folder.

   Folder shortcuts are identified by a folder icon with an arrow. File shortcuts are identified by a document icon with an arrow.

8.2.3.4 Copy or Move Folders and Files

This procedure shows you how to copy or move folders or content items to another location:

1. To copy or move an entire folder, navigate to the parent folder of the folder you want to copy.

   To copy or move one or more selected items, navigate to the folder containing the items.
2. To copy or move a single item, choose **Copy** or **Move** from the associated item menu.

To copy or move multiple items, select the items and choose **Copy** or **Move** from the folder **Actions** menu.

The Choose a Destination window opens.

3. **Browse** to the target folder, select the folder, and click **OK**.
4. To specify how naming conflicts are resolved, click **Show Advanced Options**.
5. Copied files inherit the default metadata defined by the enclosing folder. By default, moved items retain their metadata values, including security metadata.

   If your administrator enabled the **Auto propagate destination's metadata to folder** option, you can select this option to have the moved items inherit the metadata defined by the enclosing folder in the same way that copied items do.
6. Specify how to resolve duplicate names when you copy or move folders or files. After the copy or move operation completes, a window lists any conflicts and their resolutions.
   - **Resolve conflicts if file/folder exists:** Folders or files with name conflicts are renamed in the destination with a prefix of "copy of". If more than one copy is created, each subsequent copy is given a numeric increment (1, 2, 3, and so on.)
   - **Override file/folder if exits:** For one or more files, delete the duplicate file in the destination and replace it with the source file.

     For folders, merge the contents of the source and destination folders and replace the security attributes and metadata of destination folder with those of the source folder. For file conflicts within folders, delete the duplicate file in the destination and replace it with the source file.

     Deleted files are expired in the repository and removed from the folders hierarchy. Any shortcuts to deleted items are also removed from the folders hierarchy.
   - **Skip copy/moves if file/folder exists:** Skip individual items with folder or file name conflicts, but continue with the remainder of the copy or move operation. Folders with name conflicts are skipped in their entirety, including their contents.
7. Click **OK**. The items are copied (or moved) to the destination folder.
8. A window opens confirming the copy or move operation and any naming conflicts and resolutions. Click **OK**.

   As with any content item created in a folder, any new content items in the repository are created with the default metadata values assigned by the parent folder according to the rules of inheritance define for the chain of folders.

8.2.3.5 Check Out and Check in Files

The folder interface does not provide special options for checking out content. Use the check-out options provided by the Content Information and Search Results pages.

For more information about standard content check out, see Section 6.2, "Checking Out Single Files."

Files in the folder interface always point to the most current revision available. When you check in a new version of a content item using the standard check-in options, the file and any shortcuts reference the new version.

For more information about standard content check in, see Section 5.4.3, "Checking In a Revised File."

8.2.3.6 Delete Folders and Files

This procedure shows you how to do the following:

- Remove a content item from the folder structure while leaving it in the repository
- Delete a content item from both the folder structure and the repository

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Caution: When you delete a folder, all files within the folder and its subfolders are also deleted. All deleted files and associated shortcuts are removed from the folders interface and expired in the repository. Use caution when deleting folders.

---

1. Navigate to the folder that contains the folder or file you want to delete.
2. To remove a single file from the folders interface but leave it intact in the repository, choose **Remove From Folder** from the item action menu.

   Alternatively, select one or more files in the folder and choose, **Remove From Folder** from the folder Actions menu.
3. To delete a single folder or file from the folders interface and expire the related content item in the repository, choose **Delete** from the item action menu.

   Alternatively, select one or more items in the folder and choose, **Delete** from the folder Actions menu.

8.2.4 Working with Search Options and Query Folders

This section covers the following topics:

- Section 8.2.4.1, "Search for a Folder or File"
- Section 8.2.4.2, "Save a Search as a Query Folder"
- Section 8.2.4.3, "Create or Modify a Query Folder"

8.2.4.1 Search for a Folder or File

Folders and shortcuts are not included in standard search or query folder results. To search for a folder, file, or shortcut in a given folder, perform the following steps:

Note: Folder and file searches search the specified folder only. They do not search subfolders.

---

1. Navigate to the folder you want to search. The Folder Search Form opens.
2. To search for a folder within the current folder, choose **Folder** from the page Search menu. To search for a file, choose **File** from the page Search menu.

   The Folder/File Search Form opens.
3. For a selected field under Folder Metadata, choose a comparison operator that specifies whether the value matches exactly, is a substring within the actual value, and so on.

For more information about search field operators, see Section 3.5.2.3, "Metadata Search Operators for a Database Metadata Search."

4. For a selected field, specify a search value. If you leave a field blank, it effectively matches all values.

   Some fields allow you to directly enter a full or partial value. Other fields require that you choose a value from a list of values or through another selection process. For more information about folder search fields, see Section A.10.6, "Folder/File Search Form."

5. Repeat steps 3 and 4 for each field you want to specify search criteria.
6. Under Results Options, specify how to sort the search results. Choose a sort value from the **Sort By** list and choose whether the results are sorted in **Ascending** or **Descending** order.
7. To initiate the search, click **Search**. To cancel the search, navigate away from the Folder/File Search Form.

8.2.4.2 Save a Search as a Query Folder

With Folders, you also have the option to save a standard search query as a query folder.

1. Enter your search criteria in the Quick Search field or the Expanded Form and click **Search**.

   Search options vary depending on system configuration. You can save any search you create as a query folder. For more information about creating and performing searches, see Section 3, "Searching for Content Items."

2. On the Search Results page, choose **Create Query Folder** from the **Search Actions** menu. The Create Query Folder window opens.
3. **Browse** to the **Parent Folder**, or destination, where the query folder will be stored, select the folder, and click **OK**.
4. Specify a **Folder Name** for the query folder.

   Use standard Windows naming conventions when creating folders.

5. Click **OK**. The query folder is created in the destination folder.

   Query folders are identified by a folder icon with an magnifying glass.

6. To modify the search criteria associated with a query folder, open the **Folder Information** window for the query folder from the associated item or page menus and click **Edit** next to the Query Text field.

   The Expanded Search form opens and displays the criteria currently defined for the query folder. Modify the criteria and click **Save**. Click **Save** to save the changes to the query folder information.

8.2.4.3 Create or Modify a Query Folder

To create or modify a query folder, perform the following steps:

1. Navigate to the folder where you want to create the new folder. You must have write permission in the folder where you want to create the new folder.
2. Choose **New Query Folder** from the **Add** menu on the folder page. The Query Folder Creation Form opens.
3. Specify a name for the folder.

Use standard Windows naming conventions when naming folders. Do not use special characters such as the forward or backward slash characters or the double quote character.

4. To specify the search criteria, click **Edit** next to the Query Text field. The default search form opens.

   Search options vary depending on system configuration. For more information about creating and performing searches, see Section 3, "Searching for Content Items."

5. To specify **Additional Fields**, click **Show** if the fields are not displayed.
6. Choose an **Owner** for the folder from the list of defined users. By default, the current user is the owner.
7. Choose a **Security Group** from the list of defined security groups. By default, the folder uses the security group of its parent folder.
8. Click **Create**. The folder page shows the new folder and its associated Actions menu.
9. To rename the folder, choose **Rename** from the Actions menu, specify the new name and click **OK**.

   Use standard Windows naming conventions when naming folders. Do not use special characters such as the forward or backward slash characters or the double quote character.

   For more information about copying and moving folders, see Section 8.2.3.4, "Copy or Move Folders and Files."

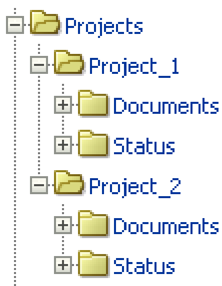
10. To change search criteria or other metadata values you specified when you created the folder, choose **Update Folder Information** from the folder Actions menu, change the values and click **OK**.

    To change metadata values for the folder when you are viewing the contents of the folder, choose **Folder Information** from the **Edit** menu on the page. For more information about folder metadata fields, see Section A.10.5, "Folder Editing Form."

8.2.5 Folder Access Example

Folders are a convenient way to grant access to certain content items. You assign security attributes to folders in the same way that you assign them to content items, including security group, account, and Access Control List attributes, if enabled. By default, content items inherit the security settings and other default metadata defined for the enclosing folder.

For example, assume you have a number of projects that members of your team are working on. You want each project to have its own folder (Project_1, Project_2, and so on) and separate folders to store project-related documents (Documents folder) and status documents (Status folder).



The security considerations for the folder structure are as follows:

- You want only members of your team to be able to add or modify the documents within the Projects folder.
- You want project team members to be able to read status documents for each project, but you want only project leads to be able to add and modify status documents.
- You want team members to be able to add and modify documents for a specific project. Some individuals may work on more than one project.
- Within each project, you may want to restrict the number of team members who can modify a given document. This requires Access Control Lists (ACL) to be enabled.

To accomplish this, ask your administrator to set up the following group, roles, and accounts and to enable Access Control List functionality. For more information about groups, accounts, and Access Control Lists, see the *Oracle WebCenter Content System Administrator's Guide for Content Server*.

- Roles: Have your administrator create the following roles:
  - **Team_Lead**
  - **Team_Member**
- Group: Have your administrator create a group called **Projects** and designate it as a special authorization group so you can use Access Control Lists. Have your administrator assign permissions to the roles in the group as follows:
  - **Team_Lead:** Assign Read (R), Write (W), Delete (D), and Admin (A) permissions.
  - **Team_Member:** Assign Read (R), Write (W), and Delete (D) permissions.
- Accounts: Have your administrator create the following accounts for each project:
  - **Project_1**
  - **Project_1/Documents**

  - **Project_1/Status**
- Users: Have your administrator assign roles and accounts to users as follows:
  - Team lead: Assign the **Team_Lead** role and the **Project** account with Read (R), Write (W), Delete (D), and Admin (A) permissions.
  - Team members: Assign the **Team_Member** role, the **Project_1/Documents** account with Read (R), Write (W), and Delete (D) permissions, and the **Project_1/Status** account with Read (R) permission.

Create the folder structure and assign security as follows:

Projects folder:

- Group: **Projects**

Projects/Project_1 folder:

- Group: **Projects** (inherited default)
- Account: **Project_1**

Projects/Project_1/Documents folder:

- Group: **Projects** (inherited default)
- Account: **Project_1/Documents**

Projects/Project_1/Status folder:

- Group: **Projects** (inherited default)
- Account: **Project_1/Status**

The Team_Lead role has the additional option of specifying Access Control List security on any content item in the Project_1 folder or its subfolders, further restricting access to those items. For more information about Access Control List security, see Section A.4, "Access Control Lists (ACL)."

8.3 Working with Contribution Folders

Contribution Folders is an optional component (Folders_g component) that provides a hierarchical folder interface within the browser, similar to a conventional file system, for organizing repository content. The newer, Folders component is meant to be a replacement for Contribution Folders. For more information about Folders, see Section 8.2, "Working with Folders."

If you have content in an existing Contribution Folders hierarchy and want to migrate the folders and files to the Folders interface, you can use the Folders Migration utility to replicate the folder hierarchy and selectively migrate folder content. For more information about the Folders Migration Utility, see the *Oracle WebCenter Content System Administrator's Guide for Content Server*.

This section covers the following topics:

- Section 8.3.7, "Checking In Content"
- Section 8.3.8, "Adding Contribution Folders"
- Section 8.3.10, "Moving Contribution Folders and Content"
- Section 8.3.11, "Creating a Shortcut"
- Section 8.3.12, "Deleting Contribution Folders and Their Content"
- Section 8.3.13, "Restoring Folders and Content from Trash"
- Section 8.3.14, "Propagating Metadata"
- Section 8.3.15, "Searching for Content in Folders"

This guide assumes that your Content Server instance is using the Trays layout with the Oracle skin, which is the default for Content Server.

8.3.1 Naming Folders

The Folders component mimics the Windows file system. Therefore, when you create a folder, you are not allowed to use double quotation marks in the name (for example, "doublequotedfolder"). Using double quotation marks causes an error. You must use the standard naming conventions for Windows when creating folders.

8.3.2 Defining User Configuration Settings

Use the following procedure to define your contribution folder configuration settings:

1. Click the **My Content Server** tray.
2. Click **My Folder Configuration**.

   The Folder Configuration Page opens.
3. Select a Content Style option.
4. If the Hide/Unhide feature is enabled, select or deselect the **Show hidden when browsing** check box.
5. If the Trash Bin function is enabled, select or deselect the following check boxes:
   - **Remove items immediately when deleted**
   - **Show only items that user has deleted in trash virtual folder**
6. Click **Update**.

8.3.3 Defining User Metadata Defaults for New Content

Use the following procedure to define default metadata values for new content checked in by a particular user.

These defaults are applied to any new content item checked in through a contribution folder *only* if a value is not defined for the folder. For more information, see Section 8.1.3.3, "Default Metadata Values."

These metadata values are applied only on initial check-in of a content item. These settings do not affect revisions to existing content. For information about how to set metadata defaults for revisions, see Section 8.3.4, "Defining User Metadata Defaults for Revised Content."

Important: Each user should follow this procedure to define their default metadata before using WebDAV to check in content through a contribution folder. Defined defaults help ensure that content items do not all have the same metadata, and that content can be checked in if required values are not defined for the folder or in the system defaults. Each WebDAV contributor should repeat this procedure after a required metadata field is added or after accounts are enabled.

To define user metadata defaults for new content:

1. Click the **My Content Server** tray.
2. Expand the **My Folder Configuration** link.
3. Click **Default Information Field Configuration for** ***user***.

   The Default Information Field Configuration Page opens.
4. Specify the default values to be applied to new content upon check-in. Use Idoc Script in any information field.
5. Click **Update**.

8.3.4 Defining User Metadata Defaults for Revised Content

Use the following procedure to define default metadata values for revised content checked in by a particular user. These defaults are applied to any content item revision checked in through a contribution folder *only* if a value is not defined for the folder. For more information, see Section 8.1.3.3, "Default Metadata Values."

These metadata values are applied only upon check-in of a revision; these settings do not affect new content items. For information about how to set metadata defaults for new content, see Section 8.3.3, "Defining User Metadata Defaults for New Content."

To define user metadata defaults for revised content:

1. Click the **My Content Server** tray.
2. Expand the **My Folder Configuration** link.
3. Click **Revision Information Field Configuration for User**.

   The Revision Information Field Configuration Page opens.
4. Specify the default values to be applied to revised content upon check-in. Use Idoc Script in any information field.
5. Click **Update**.

8.3.5 Viewing Contribution Folders

Use the following procedure to view a contribution folder from a content server Web page:

1. Click the **Browse Content** tray.
2. Click the **Contribution Folders** link.

   Exploring Contribution Folders opens. Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

3. Click folder links to drill down to the folder you want.
4. To view the Hierarchical Folder Information Page for a folder, click the Folder Information icon, choose **Folder Information** from the Action menu, or explore the folder and click the Info link.
5. If the Web Folder feature is enabled and you are using Internet Explorer 5.0 or higher, choose **Open Web Folder** from the **Content Actions** menu to view the folder in Windows Explorer.

8.3.6 Viewing Content Items

Use the following procedure to view content items from a contribution folder:

1. View the Exploring page for the contribution folder that contains the content item.

   Depending on how the system administrator set up the system, long display lists may be truncated and spread out over multiple pages. Navigation links are then provided to move between pages.

   For more information, see Section A.9.7, "Exploring Contribution Folders."
2. To view the content information for a content item, click the **Information** icon, or choose **Content Information** from the **Actions** icon shortcut menu.
3. To view a file, click the file link in the Name column.
   - If you selected the **Native** option under **Content Style** on the Folder Configuration Page, you can optionally open or save the file.
   - If you selected the **Web Viewable (Browse only)** option under **Content Style** on the Folder Configuration Page, the Web-viewable file opens.

8.3.7 Checking In Content

Use the following procedure to check in a file through a contribution folder:

1. View the Exploring page for the contribution folder you want to check the content item into.

   For more information, see Section A.9.7, "Exploring Contribution Folders."
2. Display the content check-in form using one of the following methods:
   - Choose **New Content** from the **Actions** menu.
   - Click the **Actions** icon for an existing content item, and then choose **Check In Similar**.
   - Click **New Check In** on the top menu, and then specify a folder in the **Folder** field on the check-in form.

   The content check-in form opens with the folder's default metadata filled in.
3. Enter the required metadata and any optional metadata for the content item.
4. Enter the path and file name of the **Primary File**. You cannot check two files with the same file name into the same folder.
5. In the **Inhibit Propagation** field, specify whether the content item receives propagated metadata.
   - Set the value to *false* to apply propagated metadata to the content item.
   - Set the value to *true* if the content item's metadata should remain unchanged during metadata propagation.

6. Click **Check In**.

If the number of content items in the folder exceeds the limit set by the system administrator, you receive an error message and cannot check in the new content item.

8.3.8 Adding Contribution Folders

To add a contribution folder, you must be a contributor.

Use the following procedure to add a contribution folder:

1. Choose **New Folder** from the **New Item** link on the Exploring Folder page:
2. Specify an owner for the contribution folder.
3. Specify any additional metadata values for the folder.
   - These metadata values are applied to content items upon initial check-in to this folder.
   - These metadata values override any values inherited from the parent folder.
   - Use Idoc Script in any information field.
4. In the Inhibit Propagation field, specify whether the folder receives metadata propagated from a higher-level folder.
   - Set the value to *false* if the folder receives propagated metadata.
   - Set the value to *true* if the folder's metadata remains unchanged during metadata propagation.
5. Click **Save**.

   The Exploring Contribution Folders pages shows the new contribution folder.

If the number of folders exceeds the limit set by the system administrator, you receive an error message and cannot check in the new folder.

8.3.9 Modifying Contribution Folders

To modify a contribution folder, you must have Write permission to the folder's security group. Folders without security metadata can be modified by all users.

Use the following procedure to modify a contribution folder:

1. Open the Hierarchical Folder Information Page.
2. Choose **Update** from the folder **Actions** menu.

   The Hierarchy Folder Configuration Page opens.
3. Revise one or more metadata values for the folder.
   - These metadata values are applied to content items upon initial check-in to this folder; these settings do not affect revisions to existing content in the folder.
   - These metadata values override any values inherited from the parent folder.
   - Use Idoc Script in any information field.
4. In the Inhibit Propagation field, specify whether the folder receives metadata propagated from a higher-level folder.
   - Set the value to *false* if the folder receives propagated metadata.

- Set the value to *true* if the folder's metadata remains unchanged during metadata propagation.

5. Click **Submit Update**.

   The Exploring Contribution Folders pages shows the modified contribution folder.

If the number of folders exceeds the limit set by the system administrator, you receive an error message and cannot check in the new folder.

8.3.10 Moving Contribution Folders and Content

Use the following procedure to move contribution folders and content items from one contribution folder to another:

1. View the Exploring page for the contribution folder that contains the folders, content items, or both to move.

   For more information, see Section A.9.7, "Exploring Contribution Folders."

2. Select the check boxes next to the folders and content items to be moved.
3. Click the item **Actions** icon, and choose **Move**.
4. Click the folder to move the selected items to. (You may have to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
5. Click **OK**.

   The selected items are moved to the target folder.

If local folder mapping is setup, if you move a file from one folder to another (either through the Folders user interface or WebDAV), the copy of that file in the local folder associated with the source folder is not deleted. For example, if you have a folder *WebSite*, files in this folder are automatically copied to its local folder, *C:/Website/*. If you now move a file from the folder *WebSite* to another folder, say, *Intranet*, with *Z:/Intranet/* as the local folder, then the file copy in *C:/Website/* is not deleted.

8.3.11 Creating a Shortcut

Use either of the following procedures to create a shortcut link to a contribution folder or content item in the folder hierarchy. You can create shortcuts in two ways:

- Section 8.3.11.1, "Creating a Shortcut from an Exploring Page"
- Section 8.3.11.2, "Creating a Shortcut from a Folder Information or Content Information Page"

8.3.11.1 Creating a Shortcut from an Exploring Page

Use the following procedure to create a shortcut from an exploring page:

1. View the Exploring page for the contribution folder that contains the folder or content item for which you want to create a shortcut.

   For more information, see Section A.9.7, "Exploring Contribution Folders."

2. Choose the folder or item **Actions** menu, and then choose **Create Shortcut**.

   The Browsing Window opens.

3. Click the folder where you want to create the shortcut link. (You may have to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.

4. Click **OK**.

   A shortcut link is created in the target folder.

8.3.11.2 Creating a Shortcut from a Folder Information or Content Information Page

Use the following procedure to create a shortcut from a folder information page or content information page:

1. View the Hierarchical Folder Information Page or Content Information page for the folder or content item for which you want to create a shortcut.
2. Choose **Create Shortcut** from the **Content Actions** menu.

   The Browsing Window opens.
3. Click the folder where you want to create the shortcut link. (You may have to navigate to a higher-level folder to display its subfolders.) The target folder is the open folder.
4. Click **OK**.

   A shortcut link is created in the target folder.

8.3.12 Deleting Contribution Folders and Their Content

This section covers the following topics:

- Section 8.3.12.1, "About Deleting Folders and Content"
- Section 8.3.12.2, "Deleting a Folder or Content Item"
- Section 8.3.12.3, "Permanently Deleting Folders and Content from Trash"

8.3.12.1 About Deleting Folders and Content

> **Caution:** When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. When you delete a content item, all revisions of that content item are deleted. Be extremely careful when deleting folders and content items so that you do not accidentally delete content.

Keep the following in mind when deleting contribution folders and content items:

- When you delete folders and content items from the Folders hierarchy, the action that occurs depends on whether the Trash Bin function is enabled and whether you have chosen to use the Trash Bin function in your user profile:

Trash Bin Function Enabled by System Administrator	"Remove items immediately when deleted" Check Box on the Folder Configuration Page	Result of Delete Action
Enabled	Cleared	Deleting a folder or content item moves it to the Trash folder. Items can be permanently deleted or restored from the Trash folder.
Enabled	Selected	Deleting a folder or content item permanently deletes it. *Items cannot be restored.*
Disabled	Selected or cleared	Deleting a folder or content item permanently deletes it. *Items cannot be restored.*

- To delete a content item, you must have Delete permission to the content item's security group. If accounts are enabled, you must have Delete permission to the account as well.
- To delete a contribution folder, you must be the owner of the folder or a user with Delete permission to the folder's security group. If accounts are enabled, you must have Delete permission to the account as well.
- If a folder contains any content items or subfolders that you do not have permission to delete, you cannot delete the folder.

8.3.12.2 Deleting a Folder or Content Item

Caution: When you delete a folder, all subfolders and all revisions of all content items in the folders are also deleted. When you delete a content item, all revisions of that content item are deleted. *Be extremely careful when deleting folders and content items so that you do not accidentally delete content.*

To delete a content item, you must have Delete permission for the security group of that content item. To delete a folder, you must be the Owner of the folder or have Delete permission for the folder's security group, and you must have Delete permission for the security groups of all subfolders and content items within the folder.

Use the following procedure to delete folders and content items:

1. View the Exploring page for the contribution folder that contains the folder or content item you want to delete.

   For more information, see Section A.9.7, "Exploring Contribution Folders."

2. Select the check box next to each folder and content item to be deleted.
3. For multiple selections, choose **Delete** from the **Actions** menu. For an individual selection, choose **Delete** from the **Actions** icon menu.

   You are asked to confirm the action.

4. Click **OK**.

   All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are deleted. Whether they can be restored depends on how Folders has been set up.

8.3.12.3 Permanently Deleting Folders and Content from Trash

Use the following procedure to permanently delete items from the Trash folder:

1. View the Exploring page for the Trash folder.

   For more information, see Section A.9.7, "Exploring Contribution Folders."

2. Select the check box next to each folder and content item to be permanently deleted.
3. For multiple selections, choose **Delete** from the **Actions** menu. For an individual selection, choose **Delete** from the **Actions** icon menu.

   You are asked to confirm the action.

4. Click **OK**.

All revisions of selected content items, any selected folders, any subfolders of selected folders, and all revisions of content items in these folders are permanently deleted from Content Server. *They cannot be restored.*

8.3.13 Restoring Folders and Content from Trash

If you delete a folder or content item from the Trash folder, the folder or item is permanently deleted from Content Server. To prevent permanent deletion of folders and content, you can restore them from the Trash folder to their original parent folders. Items that remain in the Trash folder are still searchable.

Use the following procedure to restore an item from the Trash folder to its original parent folder:

1. View the Exploring page for the Trash folder.

   For more information, see Section A.9.7, "Exploring Contribution Folders."

2. Click the **Actions** icon and choose **Restore**. (You can restore only one item at a time.)

3. Click **OK**.

   The item is restored to its original parent folder.

> **Important:** If the original parent folder has been deleted and is still in the Trash folder, the restored item is moved to the original folder. If the original folder has been permanently deleted, you cannot restore the item.

8.3.14 Propagating Metadata

Use the following procedure to copy metadata from a folder to its subfolders and content items.

This procedure replaces metadata values for folders and content items that are not identified as "inhibited," and there is no "undo." *Be extremely careful when propagating metadata so that you do not accidentally change values you meant to keep.*

The system administrator selects which metadata fields are included in propagation. This setting is systemwide. Be certain that you know which metadata fields are enabled for propagation before launching the process.

You can only propagate metadata for a folder if you are the owner or administrator of that folder. Empty metadata field values may not be propagated, depending on how the system has been set up.

1. Display the Hierarchical Folder Information Page for the folder from which you want to propagate metadata.

2. Choose **Propagate** from the **Folder Actions** menu.

   The metadata values defined for the current folder are copied to any uninhibited subfolders and content items within those folders. Only content items and folders for which you have Write permission to the security group are affected.

8.3.15 Searching for Content in Folders

Your Content Server instance might or might not be configured for subfolders. If it is not, then you can still search for items in a single folder. Otherwise, you have the choice to search for content in a folder or the folder and everything below. If there are many subfolders, you might be limited in how many are actually searched.

If Folders supports searching in a folder and its subfolders, then follow this procedure to search for content items in Folders:

1. Click **Search**.

   The Search page opens with a **Browse** button.

2. Click **Browse** to find and select the folder, including its subfolders, to search.
3. Specify any other parameters on the Search page and click **Search**.

8.4 Working with WebDAV

You can use the WebDAV interface in Content Server with either the Contribution Folders interface (Folders_g component) or the Folders interface (FrameworkFolders component). Except where noted, the topics in this section apply to both components.

This section covers the following topics:

- Section 8.4.1, "Working with Folders"
- Section 8.4.2, "Working with Content"
- Section 8.4.3, "Displaying Web Pages"

8.4.1 Working with Folders

This section covers these topics:

- Section 8.4.1.1, "WebDAV Folders"
- Section 8.4.1.2, "Connecting to a WebDAV Folder"
- Section 8.4.1.3, "Viewing Folders"
- Section 8.4.1.4, "Creating a New Folder"

8.4.1.1 WebDAV Folders

You connect to WebDAV folder as you would a networked location. The credentials you use are the same as those you use for the standard browser interface for Oracle WebCenter Content Server. You can work with folders and folder content as defined by your user permissions. For example, if you have Read permission for a content item, you can view the file, but you cannot check in a revision to the file.

The WebDAV interface provides a subset of the options available through the browser interface. In general, you can create, delete, move, and copy both folders and content items, and you can modify and check in content items. To check out content items through the WebDAV interface, you must use a WebDAV client that can open the file. To perform other management tasks, such as specifying or propagating metadata values, you must use the standard browser interface.

8.4.1.2 Connecting to a WebDAV Folder

You connect to a WebDAV folder as you would connect to a networked location. For example, to connect to a WebDAV folder in the Windows XP operating system:

1. In Windows Explorer, click **My Network Places** in the Folders (left) pane.
2. Double-click **Add Network Place**.

The Add Network Place Wizard screen opens. Click **Next**.

3. Click **Choose another network location** and click **Next**.
4. Enter the Web address of the WebDAV component using the following syntax:

   http[s]://*host-name:[port]/web-root*/idcplg/webdav

   For example:

   http://server.example.com/cs/idcplg/webdav

   If you are not sure which protocol, host name, or root folder to enter, see your system administrator.
5. Click **Next**. You are prompted to enter a user name and password.
6. Enter the user name and password that you use to access Content Server and click **OK**.
7. Enter a name for the WebDAV folder to display in My Network Places and click **Next**.
8. Optionally select **Open this network place when I click Finish**, and click **Finish**.

   A shortcut with the name you specified is displayed in My Network Places. With Windows Explorer, you can navigate the folder hierarchy, create, move, copy, paste, and delete folders and files.

8.4.1.3 Viewing Folders

You can view folders in Windows Explorer or from the Open or Save As dialog in a WebDAV client. You can access the folders in either of the following ways:

- Click the Web folder under the My Network Places node
- Expand the Web Folders node under the My Computer node, and then select the Web folder

8.4.1.4 Creating a New Folder

You can create a new folder in Windows Explorer or from the Open or Save As dialog in a WebDAV client. Right-click an existing Web folder, choose **New**, and then choose **Folder**.

- The newly created folder has the same default metadata as its parent folder. For information about how to modify the default metadata for Contribution Folders, see Section 8.3.3, "Defining User Metadata Defaults for New Content." For information about how to modify the default metadata for Folders, see Section 8.2.2.2, "Specify Default Folder Metadata."
- You cannot create a new folder at the root level.
- You can create folders within your personal folder (/Users/<username>/), however you typically cannot create a new folder in the Users directory itself.
- You cannot create a new query folder. To specify the associated query, you must have access to the folder metadata which is only accessible through the Folders browser interface.
- Do not use the following characters in the folder name:
  - Forward slash (/)
  - Backward slash (\)
  - Number sign (#)

– Quotation mark (")

8.4.2 Working with Content

This section covers the following topics:

- Section 8.4.2.2, "Check-In Troubleshooting"
- Section 8.4.2.3, "Checking Out Content"
- Section 8.4.2.4, "Viewing Content"
- Section 8.4.2.5, "Modifying Content"
- Section 8.4.2.6, "Deleting a Folder or Content Item"
- Section 8.4.2.7, "Restoring a Contribution Folder or Content Item"
- Section 8.4.2.8, "Copying Content"
- Section 8.4.2.9, "Moving Content"

With WebDAV folders in Windows Explorer, you can check in, view, delete, copy, and move files that were not created in a supported WebDAV client, but you must check them out through the browser interface.

8.4.2.1 Checking In Content

To check in a content item through Windows Explorer, use either of the following methods:

- Drag and drop a file from your hard drive or another network drive into a folder.
- Copy a file from your hard drive or another network drive and paste it into a folder.

To check in a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on), Save a file in a folder and then close the file.

8.4.2.2 Check-In Troubleshooting

Placing a file in a folder checks the file into the Content Server repository. Keep the following points in mind when checking in files through WebDAV.

General Check-In Considerations

- You can use Windows Explorer to manage files that were created in a non-WebDAV client, but to check content out of the Content Server repository, you must use a WebDAV client.
- You cannot check two files with the same file name into the same folder.
- Make sure you define default values for required metadata fields for a folder or an error will occur when you try to check in content.

  For information about how to modify the default metadata for Contribution Folders, see Section 8.3.3, "Defining User Metadata Defaults for New Content." For information about how to modify the default metadata for Folders, see Section 8.2.2.2, "Specify Default Folder Metadata."
- If the Save As window opens when you attempt to place a file in a folder, you do not have Write privileges to the security group defined for that folder. You must select a different folder, or save the file on your hard drive and then check in the file through a Web browser where you can select the appropriate metadata.

- If your file has double-byte characters (for example, Chinese, Japanese, or Korean) in the file name and Content Server is running on a Western European operating system, you may not be able to check in the file through WebDAV due to a limitation in Microsoft's WebDAV clients. Eliminate double-byte characters from the file name or check in the file through the Web browser interface of Content Server.
- Do not use the number sign (#) in your file name. The number sign (#) is an illegal WebDAV character.
- If you use a shortcut to open a folder, the folder might not show recent changes to content items until you refresh the display by pressing **F5** or selecting **Refresh** from the View menu. This is a known cache problem with folder shortcuts in Microsoft Windows.

Check-In Considerations for Contribution Folders

- The title of the checked-in content item depends on the value of the WebDAV title allocation configuration parameter as set by the system administrator. The title is either the file name (with or without the file extension) or the default title metadata value defined for the folder where the content item resides. Content item titles are assigned as follows:
  - If the WebDAV title inheritance configuration setting is disabled (the default value), the title is the file name *without* the file extension (for example, "monthly_report"). This naming convention is applied even if a default title metadata value is defined for the folder.
  - If the WebDAV title inheritance configuration setting is enabled and no default title metadata value has been defined for the folder, the title is the file name *with* the file extension (for example, "monthly_report.doc").
  - If the WebDAV title inheritance configuration setting is enabled and a default title metadata value is defined for the folder, the title is the defined name (for example, "Monthly Report").
- In most WebDAV configurations, an open file is not checked in to Content Server repository until the file is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save creates a new revision in Content Server.

8.4.2.3 Checking Out Content

Opening a file from a folder either through Windows Explorer or through a WebDAV client such as a Microsoft Office application checks out the file from the Content Server repository and locks the file so that other users can only view it.

The Undo Check Out option cancels the content item check-out. This option is displayed only if the content item is checked out, and it is only available to the user who checked out the content item.

8.4.2.4 Viewing Content

You can view a content item without affecting the revision number by opening the content item and then closing the file without saving it. This action results in an "Undo Checkout" rather than a check-in of a new revision.

Caution: If you save any changes to a file opened from a WebDAV folder, you create a new revision.

8.4.2.5 Modifying Content

Modifying a file in a folder checks in a new revision of the content item. Use one of the following procedures to modify a content item.

8.4.2.5.1 Modifying a File in a WebDAV Client Format Use the following procedure to modify a file that is in a WebDAV client supported format (Word, Excel, PowerPoint, and so on):

1. Open the file from a folder, either through Windows Explorer or from a WebDAV client.

   The file is checked out of the Content Server repository.
2. Make changes to the file.
3. Save the changes.
4. Close the file.

   The file is checked in as a new revision.

In most WebDAV configurations, an open file is not checked in to the Content Server repository until the file is closed, so you can save the file repeatedly without affecting the revision number. Your system administrator can change this so that each save, including automatic saves, creates a new revision in Content Server.

8.4.2.5.2 Modifying a File in a Non-WebDAV Client Format Use the following procedure to modify a file that is not in a WebDAV client supported format:

1. Copy the file from a folder to a temporary location. Do not change the file name.
2. Modify the file.
3. Save the changes to the temporary file and close the file.
4. Move or copy the file to its original folder, and replace the existing file.

   The file is checked in as a new revision.

8.4.2.6 Deleting a Folder or Content Item

You can delete a folder or content item from Windows Explorer or from the Open or Save As window in a WebDAV client. Browse to the folder or content item you want to delete, right-click, and choose **Delete** from the popup menu (or press the Delete key).

> **Caution:** When you delete a folder, all files within the folder and its subfolders are also deleted. All deleted files and associated shortcuts are removed from the folders interface and expired in the repository. Use caution when deleting folders or content items.

For detailed information on security and the Trash Bin function for Contribution Folders, see Section 8.3.12, "Deleting Contribution Folders and Their Content." For information about the effects of deleting content in Folders, see Section 8.2.3.6, "Delete Folders and Files."

8.4.2.7 Restoring a Contribution Folder or Content Item

If you are working with Contribution Folders and the Trash Bin function is enabled, you can restore a folder or content item from Windows Explorer using one of the following methods:

- Drag and drop the folder or file from the Trash folder to another contribution folder.
- Cut the folder or file from the Trash folder and paste it into another contribution folder.

8.4.2.8 Copying Content

Copying a file from one folder to another checks in the copied file as a new content item. If the file has the same file name as an existing file in the target folder, a new revision is checked in. The new content item or new revision is stored with the file name and metadata of the latest revision of the source. Any of the following actions copies a content item from one folder to another if you elect to replace the existing file:

8.4.2.8.1 Copying Through Windows Explorer Use one of the following methods to copy a content item through Windows Explorer:

- Right-drag a file from a folder to another, release, and choose **Copy Here**.
- Copy a file from a folder and paste it into another folder.

8.4.2.8.2 Copying Through Microsoft Office Use the following method to copy a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Open a file from a folder, from the **File** menu, choose **Save As**, select a different folder, click **OK**, and close the file.

> **Important:** If the Save As dialog opens twice, you do not have Write privileges to the security group defined for the folder. You must select a different folder, or save the file on your hard drive and then check in the file through a Web browser where you can select the appropriate metadata.

8.4.2.9 Moving Content

Any of the following actions moves a content item from one folder to another:

8.4.2.9.1 Moving Through Windows Explorer Use one of the following methods to move a content item through Windows Explorer:

- Drag and drop a file from one folder to another.
- Cut a file from a folder and paste it into another folder.

8.4.2.9.2 Moving Through Microsoft Office Use the following method to move a content item through a Microsoft Office application (Word, Excel, PowerPoint, and so on):

- Open a file from a folder, from the **File** menu, choose **Save As**, select a different folder, click **OK**, and close the file.

Moving a file to a different folder does not change the metadata. To apply the new parent folder's metadata, you can use the metadata propagation function. For more information, see Section 8.1.3.5, "Metadata Propagation."

8.4.3 Displaying Web Pages

You can access Content Server folder Web pages through Windows Explorer rather than through a Web browser.

8.4.3.1 Configuring Windows Explorer

To be able to display Web pages through Windows Explorer, the application must be set to display the full path in the title bar:

1. In Windows Explorer, from the **Tools** menu, choose **Folder Options**.

   The Folder Options window opens.

2. Open the View tab.
3. Under Files and Folders, select the **Display the full path in title bar** check box.
4. Click **OK**.

8.4.3.2 Displaying a Web Page

Use the following procedure to display a content server Web page from Windows Explorer:

1. Access the Web Folders folder in Windows Explorer. This folder is usually under My Computer.

   If the Web Folders folder is not displayed, access your folders under My Network Places. You might have to do this a few times for Web Folders to appear.

2. In Windows Explorer, double-click the folder on the right for which you want to display the Web page.
3. Click the Address bar at the top of the window.
4. Press the Enter key.

   The exploring page for the folder opens.

9

Grouping Content with Folios

This chapter describes folio concepts in Oracle WebCenter Content Server and how to use folios to organize content in a consistent and repeatable structure.

- Section 9.1, "Content Folios"
- Section 9.2, "Working with Folios"

9.1 Content Folios

Oracle WebCenter Content Server provides a quick and effective way to assemble, track, and access logical groupings of multiple content items from within the secure environment of Oracle WebCenter Content Server. For example, you can assemble all items relevant to an upcoming brochure, such as images, logos, legal disclosures, and ad copy, and send them through a workflow process. Or perhaps a new project requires a virtual place to assemble all relevant content items in a particular hierarchy, whenever they are checked in, with restricted access to particular areas of the hierarchy. Or a video may have to be associated and tracked with release waivers and narration text.

This section contains the following topics:

- Section 9.1.1, "About Content Folios"
- Section 9.1.2, "When to Use a Folio"

9.1.1 About Content Folios

This section describes folios and how to use them:

- Section 9.1.1.1, "What a Folio Is"
- Section 9.1.1.2, "The Folio Structure"

9.1.1.1 What a Folio Is

Technically, a content folio is an XML file checked in to Content Server that uses elements to define a hierarchical structure of nodes, slots, and specified content items in Content Server. In practice, a content folio is a logical grouping or a framework to structure content stored in Content Server.

A *simple folio* is a flat container, while an *advanced folio* can nest content in a hierarchy within folders. In an advanced folio, you can establish the hierarchy before, during, or after you assemble the content items.

You can add content to existing folios or lock them so changes cannot be made. You can add content items folio by searching the repository. You can add content items to an advanced folio by checking new items into the repository or by searching for existing content. An advanced folio can also contain hyperlinks to outside resources such as Web sites or shared network drives.

9.1.1.2 The Folio Structure

Within Content Server, a folio opens starting at the root, or top level. Each simple folio contains content items displayed in a table similar to a standard search results page. You can add content to a simple folio by searching through Content Server.

Each advanced folio can contain folders, called nodes, placeholders for content, called slots, and content items, displayed by default in a hierarchical structure, similar to a standard file system. Slots in an advanced folio are populated with content items by either checking in a new item, or searching for an existing item in Content Server and inserting it into the slot.

Figure 9–1 Simple Folio Structure

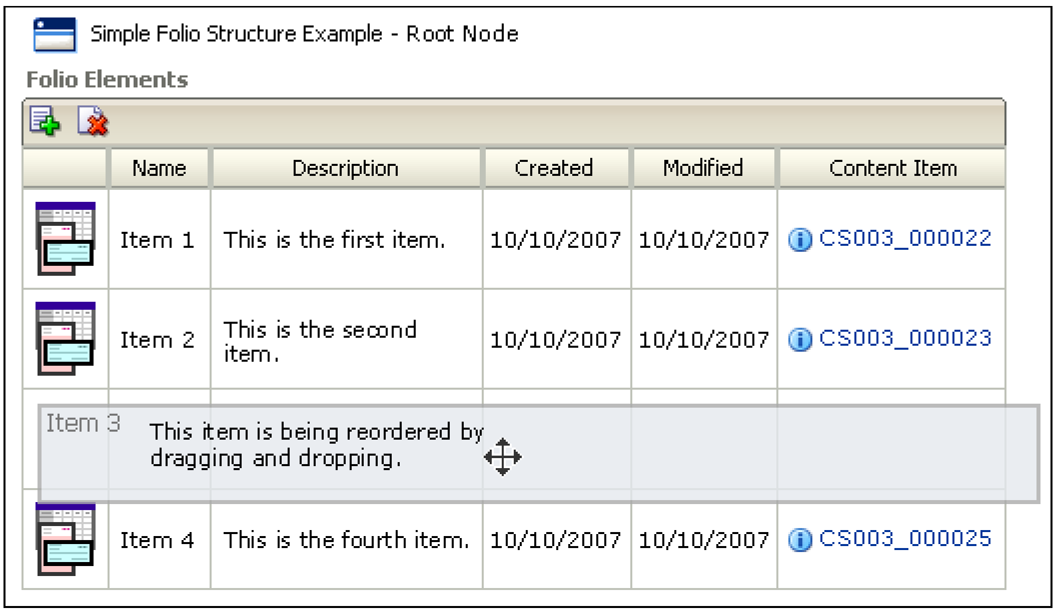
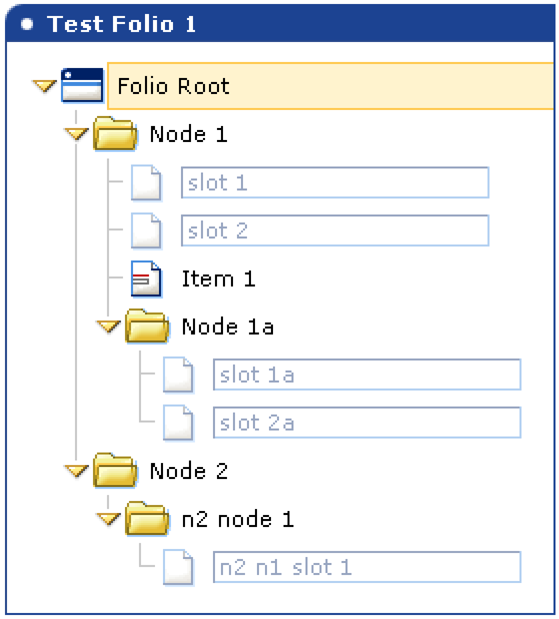


Figure 9–2 Advanced Folio Structure



9.1.2 When to Use a Folio

Use a folio any time you want to create a logical grouping of content, or when you want to provide a structure for other people to create a logical grouping of content. Use folios to associate content with a project or vendor, or to group multiple content items in a hierarchy. The following topics describe when to use folios:

- Section 9.1.2.1, "Structured Organization of Content"
- Section 9.1.2.2, "Management of Records and Reports"
- Section 9.1.2.3, "Management of Digital Assets and Production"
- Section 9.1.2.4, "Custom Uses"

9.1.2.1 Structured Organization of Content

Use Folios to organize content. For example, a company has a consistent way of giving sales presentations to prospective clients, with existing content items used in each new presentation, along with new content specific to the prospective client. Each presentation includes printed material with current background information on the company, printed material of recent press coverage, a slide presentation pertinent to the prospective client, and comments by members of several different departments. Create a folio template that includes content items of the most recent background and press coverage automatically, and has empty slots for the new slide presentation and new comments from each department. When you develop a presentation for a new client, use the template to create a folio that and route it in workflow. The background information and press coverage reflects the most recent information automatically, and the necessary people insert the required slide presentation and comments as it passes to them in the workflow.

9.1.2.2 Management of Records and Reports

Folios are useful when you want to create and review a group of documents as part of one or more workflow processes. For example, an agency generates intelligence reports on various topics. Each report typically has many documents arranged in a particular hierarchy, and every report has the same hierarchy. A system administrator creates a template with nodes in the correct hierarchy. In the appropriate nodes of the hierarchy, he clones required forms, inserts current versions of standard content items included in each report, and creates slots where new content items must be inserted, with labels for the slots indicating what each is for.

When an agent begins a new report, the agent creates a new folio based on the template created by the system administrator. After the agent collects and enters certain crucial information, other agents contribute additional information. After agents contribute all the required parts of the report, meaning that all slots in the folio are filled, the folio is sent through one or more workflow processes. The processes may involve further editing and analysis of the data. There may also be processes where one or more the documents contained in the report must be translated. The translated documents may be added as part of the report if required, or a link could be inserted in the folio to the translations, stored separately.

Security is maintained throughout the creation, review, and translation process based on existing Content Server permissions, meaning that not all contents of the folio are visible to all participants of the workflow. For example, certain employees with *Secret* clearance cannot see documents or nodes that require *Top Secret* clearance. In such cases, the agents with *Secret* clearance also remain unaware of the existence of *Top Secret* items in the folio. Employees who have *Top Secret* clearance see all *Top Secret* and *Secret* documents in the folio. At any stage in the creation or workflow process, an authorized agent can easily collect all the items in the folio and download them as a compressed file. Similarly, an authorized user can compile PDFs or content converted to PDF (with PDF Converter) as a single PDF file for easy printing.

9.1.2.3 Management of Digital Assets and Production

Often catalogs, technical manuals, and other collateral material require many separate files that must be managed, reviewed, and sent to a vendor for production. A folio is an ideal way of organizing such content.

For example, a large retail chain produces advertising biweekly flyers distributed with newspapers, quarterly catalogs distributed by mail, and an online Web site. The three products, flyer, catalog, and Web site, share images and text. Each flyer has 8 pages of products, the catalog has 120 pages, and the Web site lists the entire inventory.

An advertising/marketing manager at the company begins a new flyer by selecting the Flyer template from the folio template options, and begins a new catalog by selecting the Catalog template.

The new flyer folio contains a slot for the design file, and 8 nodes representing each page. Each node contains a sub-node for images and slots for ad copy. Depending on how the template is set up, the slots could be blank or filled with cloned versions of the previous flyer copy and images as a starting point.

The new catalog folio contains a slot for the catalog design file, a slot for discussion of the catalog design, a node for global images, and 7 nodes representing each section of the catalog. Each section node has a slot for the section design file, a sub-node for images, and another sub-node for ad copy.

The folios are sent into workflow to others who create content for the empty slots or modify the existing content. As items are checked in to Content Server, a single item is added to each of the folios. When all items are checked in to a folio, the folio continues on in the workflow to the layout designers, who create the flyer and catalog designs. When each folio is done, it is locked and future flyers and catalogs are started by copying these or beginning fresh using the appropriate template.

9.1.2.4 Custom Uses

The preceding examples are only a few ways in which you can use folios in Oracle Content Server. If you would like help implementing Content Server within your organization, contact Oracle Consulting Services.

9.2 Working with Folios

Like any other item in Content Server, you create folios and check them in to the repository. You can search for and review associated metadata. You can track folio revisions and lock or unlock folios to control changes to the folio.

This section covers the following topics:

- Section 9.2.1, "Creating a Simple Folio"
- Section 9.2.2, "Creating an Advanced Folio"
- Section 9.2.3, "Modifying Folio Structure and Content"
- Section 9.2.4, "Taking Snapshots"
- Section 9.2.5, "Locking and Unlocking Folios"
- Section 9.2.6, "Downloading Folio Renditions"
- Section 9.2.7, "Finding Existing Folios"
- Section 9.2.8, "Viewing Folios"
- Section 9.2.9, "Viewing Folio Information"
- Section 9.2.10, "Subscribing to Folios"
- Section 9.2.11, "Using Digital Asset Baskets"
- Section 9.2.12, "Understanding Folio Workflows"

9.2.1 Creating a Simple Folio

A simple folio creates a flat folio with no additional hierarchy. A simple folio displays content in a table, similar to a search results page. You can convert a simple folio to an advanced folio later if you require additional structure, however you cannot convert an advanced folio to a simple folio.

Although a simple folio displays content in a manner similar to a standard Content Server search results page, there is an important difference. A standard search results page displays content information from a content item's metadata. The Edit Simple Folio Page displays element information from the XML file stored in Content Server that defines the folio. This element information is unique to the folio, and can be changed in the folio without affecting the content item's metadata. For more information, see Section 9.2.3.1.4, "Updating Simple Folio Element Information," and Section A.12.5.2, "Element Info Tray."

To create a simple folio after you have logged in to Content Server:

1. Click the **Content Management** tray.
2. Click **New Folio**. The Pick Folio Type Page opens.
3. Accept the default, Simple Folio.
4. Click **Load folio**. The Edit Simple Folio Page opens.
5. Choose **Save folio** from the **Actions** menu. The Set Folio Profile Page opens.

Important: You must save the folio before navigating away from it. Saving the folio checks the folio into Content Server. If you do not save the folio, it and any changes to it are lost.

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6. Select the profile to be used with the folio, if any, and click **Next**. The Folio Check In Page opens.
7. Enter the required information and click **Check in**. The Folio Check In Confirmation Page opens.
8. Select how to proceed and click **Finish**. Options are:
   - Continue editing the folio to add content: The Edit Folio Page opens.
   - View content information for the folio: The content information page for the folio opens.
   - View the folio: The View Folio Page opens.

9.2.2 Creating an Advanced Folio

An advanced folio is a folio that allows for a hierarchical structure. The system administrator may define the structure in a template. If the folio has no template associated with it, you can modify the folio structure dynamically as you create and edit the folio. The structure of a template-based folio may or may not be modifiable, depending on the template.

To create an advanced folio after you have logged in:

1. Click the **Content Management** tray.
2. Click **New Folio**. The Pick Folio Type Page opens.
3. Select **Advanced Folio** and optionally select a template.
4. Click **Load folio**. If a content item associated with a selected folio template is set to be cloned, then the Set Folio Profile Page opens and you are prompted to first check in the folio and skip to Step 6. If not, The Edit Folio Page opens.
5. Choose **Save folio** from the **Actions** menu. The Set Folio Profile Page opens.

Important: You must save the page before navigating away from it. Saving the folio checks the folio into Content Server. If you do not save the folio, it and any changes to it are lost.

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6. Select the profile to be used with the folio, if any, and click **Next**. The Folio Check In Page opens.
7. Enter the required information and click **Check in**. The Folio Check In Confirmation Page opens.
8. Select how to proceed and click **Finish**. Options are:
   - Continue editing the folio to add structure or content: The Edit Folio Page opens.
   - View content information for the folio: The Content Server content information page for the folio opens.
   - View the folio: The View Folio Page opens.

9.2.3 Modifying Folio Structure and Content

Simple folios have a flat structure displayed as a table. You can change the order of the content with the Edit Simple Folio Page. You can add or delete content, but you cannot add hierarchical structure to a simple folio. You can convert a simple folio to an advanced folio later if you require additional structure, however you cannot convert an advanced folio to a simple folio.

Advanced folios have a hierarchical structure. If a predefined template is selected when the folio is created, the folio may or may not be modified, depending on the properties defined for the template by the system administrator. If no template is selected when the folio is created, the folio has a single, root node. You can add, modify, move, and delete nodes, slots, and content items within an advanced folio's structure and set the associated properties with the Edit Folio Page.

This section covers the following topics:

- Section 9.2.3.1, "Editing a Simple Folio"
- Section 9.2.3.2, "Editing an Advanced Folio"

9.2.3.1 Editing a Simple Folio

Simple folios have a flat structure. You can add, delete, or reorder items within a simple folio. Unlike advanced folios, items added to a simple folio must be checked in to Content Server.

9.2.3.1.1 Adding Items to a Simple Folio To add items to a simple folio, use the Edit Simple Folio Page.

To add content to a simple folio:

1. On the Edit Simple Folio Page, click the **Add Row** icon in the table heading above the thumbnail column. A search profile page opens.
2. Select a search profile, if necessary, and click **Next**. The appropriate search form opens.
3. Enter your search criteria and click **Search**. A search results page opens.
4. Select the item or items you want to add to the simple folio and click **Next**. The selected items are added to the content listed in the simple folio.
5. Choose **Save changes** from the **Actions** menu to save the content to the folio.

Important: You must save the page before navigating away from it. If you do not save the folio, it and any changes to it are lost.

9.2.3.1.2 Deleting Items from a Simple Folio To delete items from a simple folio, use the Edit Simple Folio Page.

To delete content from a simple folio:

1. To select the item to be removed from the folio on the Edit Simple Folio Page, click the row of the item to be deleted. The row is highlighted.

Tip: To select multiple, sequential items, hold the shift key down and click the first and last items. To select multiple, non-sequential items, hold the control key down and click each item.

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2. Click the **Delete Row** icon in the table heading above the thumbnail column. The item or items are removed from the displayed list of items in the folio.
3. Choose **Save changes** from the **Actions** menu to save the content to the folio.

> **Important:** You must save the page before navigating away from it. If you do not save the folio, it and any changes to it are lost.

9.2.3.1.3 Reordering Items in a Simple Folio To reorder items in a simple folio, drag and release them.

To reorder items in a simple folio:

1. Click and hold on the row you want to move and drag it to the new position, then release.
2. Choose **Save changes** from the **Actions** menu to save the content to the folio.

9.2.3.1.4 Updating Simple Folio Element Information The content of a simple folio is specified in an XML file stored in Content Server. This folio information is displayed in the table of the Edit Simple Folio Page. Because this information is specific to the folio, you can change the folio information without affecting the metadata of the content item or the information in any other folio with which a content item may be associated.

To update the element information in a simple folio:

1. On the Edit Simple Folio Page, double-click the information you want to update. An editable text field opens above the information. By default, you can update only the name and description.
2. Modify the information and press the **Enter** key, or click anywhere outside of the text field. The changes are applied.
3. Choose **Save changes** from the page **Actions** menu. The element information is updated.

9.2.3.2 Editing an Advanced Folio

An advanced folio is a folio that allows for a hierarchical structure and the insertion of *Hypertexts*, which are hyperlinks to Web sites. Like a simple folio, you can add, delete, or reorder items within an advanced folio. Unlike simple folios, you can nest items in folders (nodes), create empty slots as placeholders for content items, search for and add items, and check in new content through the folio interface.

The structure and content associated with an advanced folio is specified in an XML file stored in Content Server. This information is displayed in the Element Info Tray area of the Edit Folio Page. Because this information is specific to the folio, you can change the folio information without affecting the metadata of the content item or the information in any other folio with which a content item may be associated.

The structure of an advanced folio may be predefined in a template by the system administrator. The structure of a template-based folio may or may not be modified later, depending on the template.

9.2.3.2.1 Adding and Organizing Nodes and Slots You can add, move, and delete nodes and slots from folios with the Edit Folio Page. Working with the folio hierarchy and organizing items within it is similar to working with folders and files in other environments, such as a computer file system. For example, you can drag-and-drop content items into a folder or slot from the Source Items Tray, and drag-and-drop nodes, slots, and items within the folio hierarchy area to reorganize them. Additionally, right-click a node, slot, or item in the folio hierarchy section to display a contextual menu with options for the selection identical to those in the contextual menu of the Element Info area.

To add nodes or slots to a folio:

1. Navigate to the Edit Folio Page of the folio to modify.
2. Select the node in which to add a new node or slot. You can select a root node, or a node within another node.
3. Right-click the selected node or click the contextual menu icon in the Element Info area to open an element contextual menu.
4. Choose **Create Node** or **Create Slot** from the contextual menu. A new node or slot is displayed.
5. Choose **Save changes** from the **Actions** menu to save the changes to the folder hierarchy.

Important: If you do not save changes before navigating away from the folio, any changes are lost.

9.2.3.2.2 Adding Content Items to an Advanced Folio Content items are added to an advanced folio by using the Source Items tray on the Edit Folio Page, the Element Info contextual menu, a search results page, or a digital asset basket. For example, content items are added to a folio by one of the following ways:

- By using the Source Items area on the Edit Folio Page to search for existing content, and then dragging the items into the folio hierarchy

  For more information, see Section 9.2.3.2.3, "Adding Items from the Source Items Area."

- By displaying a digital asset basket in the Source Items area on the Edit Folio Page, and then dragging the items into the folio hierarchy

  For more information, see Section 9.2.3.2.3, "Adding Items from the Source Items Area."

- By choosing **Insert Item by Search** from the **Element Info** contextual menu to search for existing content and add it to the folio

  For more information, see Section 9.2.3.2.4, "Inserting an Existing Item Using a Contextual Menu."

- By choosing *Insert Item by Checkin* from the Element Info contextual menu to check a new content item and add it to the folio

  For more information, see Section 9.2.3.2.5, "Inserting an New Item Using a Contextual Menu."

- By using a search results page to add existing content to the Source Items area of a new or existing advanced folio

  For more information, see Section 9.2.3.2.6, "Adding Items from a Search Results Page."

- By publishing content gathered in a digital asset basket to a new folio created during the publishing process

For more information, see Section 9.2.3.2.7, "Adding Items from a Digital Asset Basket."

9.2.3.2.3 Adding Items from the Source Items Area The Source Items area of an Edit Folio Page displays content checked in to Content Server. The content may be collected in a digital asset basket that is displayed in the Source Items area, or collected using the Source Items area search feature. The source items contextual menu lists each set of items that can be displayed in the Source Items area.

To add items to a folio from the Source Items area:

1. Navigate to the Edit Folio Page of the folio where you want to add content.
2. Choose the content set containing the items to add from the Source Items area contextual menu.
3. Select the appropriate item in the Source Items area, and drag it to the node or slot in the folio to which to add the item.
4. Choose **Save changes** from the Edit Folio Page **Actions** menu.

Important: If you do not save changes before navigating away from the folio, any changes are lost.

If no items have been collected into a digital asset basket or into the Source Items area, you can search for items using the Source Items area search function.

To collect items into the Source Items area using the search function

1. Navigate to the Edit Folio Page of the folio where you want to add content.
2. Click **Search** in the Source Items area. The Search for Items page opens.
3. Select a profile to use for searching, if any, and click **Next**. A search form opens.
4. Select the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page opens.
5. Select the check box next to the item or items in the search results to collect, then click **Next**. The items are listed in the Source Items area.
6. Choose **Save changes** from the Edit Folio Page Actions menu.

Note: You cannot select items across multiple pages of search results.

9.2.3.2.4 Inserting an Existing Item Using a Contextual Menu Items that have been checked in can be searched for and inserted directly into a folio node or slot by choosing **Insert Item by Search** from the **Element Info** contextual menu. You can also right-click the appropriate node or slot to access this contextual menu.

To search for and insert a content item directly into a folio node or slot:

1. Navigate to the Edit Folio Page of the folio where you want to add content.
2. Select the node or slot into which the content goes.
3. To open the **Element Info** contextual menu, either right-click the node or slot, or click the contextual menu in the Element Info area. The **Element Info** contextual menu opens.

4. Choose **Insert Item by Search.** The Search for Item page opens.
5. Choose the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page opens.
6. Click **Select** next to the item to insert. The item is inserted into the folio.

9.2.3.2.5 Inserting an New Item Using a Contextual Menu New items that have not yet been checked in can be inserted directly into a folio node or slot by using **Insert Item by Check In** in the Element Info contextual menu. You can also right-click the appropriate node or slot to access this contextual menu.

To search for and insert a content item directly into a folio node or slot:

1. Navigate to the Edit Folio Page of the folio where you want to add content.
2. Select the node or slot into which the content goes.
3. To open the **Element Info** contextual menu, either right-click the node or slot, or click the contextual menu in the Element Info area. The **Element Info** contextual menu opens.
4. Choose **Insert Item by Check In.** The Item Check In page opens.
5. Fill in the appropriate criteria for the item you are checking in, and click **Check In**. A check in confirmation page opens.
6. Click **Add Item to Folio**. The item is inserted into the folio.
7. Choose **Save changes** from the Edit Folio Page **Actions** menu.

9.2.3.2.6 Adding Items from a Search Results Page You can add items from a search results page either directly to a new folio, or to the Source Items area of an existing folio or new template-based folio. When listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. For more information, see Section 9.2.3.2.3, "Adding Items from the Source Items Area."

To add items from a Search Results Page to a new folio:

1. From a search results page, select the check box next to the item or items you want to add to the folio.
2. Choose **Add items to folio** from the table **Actions** menu above the check boxes. The Add Items To Folio page opens.
3. Select **New folio** and click **Next**. The Pick Folio Type page opens.
4. Select **Simple Folio,** or select **Advanced Folio** and choose an appropriate template, if any.
   - Selecting **Simple Folio** inserts the selected content items in the root node of a flat, single node folio. For more information, see Section A.12.4, "Edit Simple Folio Page."
   - Selecting **Advanced Folio** enables the Folio Template list, providing access to folio templates with structure predefined by a system administrator. For more information, see Section A.12.5, "Edit Folio Page."
5. Click **Load folio**. If **Simple Folio** was selected in Step 4, then the Edit Simple Folio Page opens with the selected elements listed. If **Advanced Folio** was selected in Step 4, then the Edit Folio Page opens with the selected content items inserted into the root node of the advanced folio.
6. Choose **Save changes** from the Edit Folio Page **Actions** menu.

Important: If you do not save changes before navigating away from the folio, any changes are lost.

To add items from a Search Results Page to an existing folio:

1. From a search results page, select the check box next to the item or items you want to add to the folio.
2. Choose **Add items to folio** from the table **Actions** menu above the check boxes. The Add Items To Folio page opens.
3. Select **Existing folio**, and click **Next**. The Select Folio Profile page opens.
4. Select the appropriate profile, if any, and click **Next**. The Search for Existing Folio page opens.
5. Choose the criteria appropriate to the folio for which you are searching, and click **Search**. The Folio Listing page opens.
6. Click **Select** by the folio to which the content items are to be added. The Edit Folio Page of the selected folio opens, with the content items listed in the Source Items area. When listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. For more information, see Section 9.2.3.2.3, "Adding Items from the Source Items Area."
7. Choose **Save changes** from the Edit Folio Page **Actions** menu.

9.2.3.2.7 Adding Items from a Digital Asset Basket Digital asset baskets are used to manage collected items. Items in digital asset baskets are displayed in the Source Items area of a folio when a digital asset basket is chosen from the Source Items contextual menu. When displayed in the Source Items area, content in a digital asset basket can be added to the folio by dragging it to the appropriate node or slot. For more information, see Section 9.2.3.2.3, "Adding Items from the Source Items Area."

Additionally, items in a digital asset basket can be published to a new folio from the Digital Asset Basket page.

To publish content in a digital asset basket:

1. Open **My Baskets** in the **My Content Server** tray and select the digital asset basket that contains the items to be published to a new folio. The digital asset basket page for that basket opens.
2. Choose **Publish to folio** from the page **Actions** menu. The Edit Folio Page opens with the published items inserted at the root level of a new folio.
3. Choose **Save folio** from the Edit Folio Page **Actions** menu.
4. Continue with Step 6 of Section 9.2.2, "Creating an Advanced Folio."

Important: If you do not save changes before navigating away from the folio, any changes are lost.

9.2.3.2.8 Updating Advanced Folio Element Information To update the element information in an advanced folio:

1. Select the node, slot, or item you want to update in the Folio Structure Tray of the Edit Folio Page. The element information is displayed in the Element Info Tray.

2. Modify the information and press the **Enter** key, or click anywhere outside of the text field. The changes are applied.
3. Choose **Save changes** from the page **Actions** menu. The element information is updated.

9.2.4 Taking Snapshots

A folio's hierarchy is defined in an XML file checked in to Content Server as a content item. Like any content item, a folio can have multiple revisions. Unlike other content items, however, new revisions of a folio are created by taking a snapshot of the folio using the Edit Folio Page Actions menu, rather than explicitly checking out the content and checking in a new revision.

When a snapshot is taken, the current hierarchy is saved and duplicated as a new revision. The new revision can continue to be edited. The previous revision maintains the folio hierarchy at the point the snapshot was taken. Like any content item, you can access the revision history of the folio from the folio content information page.

To take a snapshot of a folio:

1. Navigate to the Edit Folio Page for the folio.
2. Choose **Create snapshot** from the **Actions** menu. The Edit Folio page refreshes.

> **Tip:** You can verify that a new revision has been created by choosing **Content Item Info** from the **Actions** menu on the Edit Folio Page and reviewing the revision history on the Content Information page.

9.2.5 Locking and Unlocking Folios

Locking a folio takes a snapshot of a folio and locks it, preventing it from being edited. After a folio is locked, people who have rights to edit the folio are directed to the View Folio page instead of the Edit Folio Page.

To lock a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Choose **Lock folio** from the Actions menu. The View Folio page opens.

If required, you can unlock a locked folio for additional edits. Unlocking a folio duplicates the locked folios hierarchy as a new revision available for editing.

To unlock a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Choose **Create editable revision** from the Actions menu. The Edit Folio page opens.

9.2.6 Downloading Folio Renditions

Your system administrator defines renditions and can make them available in a variety of forms. For example, a single ZIP file rendition could contain all folio content to which you have access. A PDF rendition could assemble all folio content to which you have access into a single PDF file suitable for printing.

To download renditions of a folio:

1. Navigate to the Edit Folio Page of the folio.
2. Choose the rendition you require from the **Renderers** menu. A dialog box asking for the download location opens.

Important: A PDF rendition is only possible if the content associated with the folio has a PDF Web-viewable file. That is, either the associated content item is a PDF file, or that your system administrator has set up PDF Converter to generate a PDF version.

Important: Only folio items that have a PDF version become part of the PDF rendition.

9.2.7 Finding Existing Folios

Because Content Server manages a folio as a single XML file, you can find folios by searching Content Server in the same way you would find any content item. You can use the search tray, the Advanced Search page, or the Quick Search field to search for folio titles or other associated metadata. Only folios for which you have permissions are displayed in the search results. A folio icon is displayed in the Actions column of the search results field. Click the icon to display the folio. If you can edit the folio, the Edit Folio Page opens, otherwise, the View Folio Page opens.

On the content info page of a content item that is in a folio, there is a Folio Membership section (above the Revision table) with a "show" link which lists the folios to which the content is a member. There are also action icons next to the listed folios with the option to View the Folio or see it's content info.

9.2.8 Viewing Folios

You can view Folios in the following ways:

- The Edit Folio Page displays the folio hierarchy and allows you to edit the folio, provided you have the rights to do so.
- The View Folio Page shows, by default, the folio hierarchy but does not allow you to edit it. Your system administrator can define additional views that may not resemble the default folder hierarchy view.
- View the native XML file (file extension .xcsr) from a content information page link.

9.2.9 Viewing Folio Information

Folio information, including revision history, is displayed on the content information page of the XML file checked in to Content Server. To access folio information, click the Info icon next to a folio in the Actions column on a search results page, or choose **Content Item info** from the **Actions** menu on the Edit Simple Folio Page, Edit Folio Page, or View Folio Page.

9.2.10 Subscribing to Folios

You can subscribe to simple and advanced folios like any other item in Content Server. Because changes can be made to folios and folio items without causing a new revision to the folio, however, you can choose the types of changes that cause you to be notified using the Subscribe to folio_name page.

To subscribe to changes made to a folio or folio items:

1. Choose **Subscribe** from the **Content Actions** menu on the content information page of the folio to which you want to subscribe. The Subscribe to folio_name page opens.
2. Select the check box next to one or more of the actions for which to be notified:
   - **Child update**: Any change to content linked to by this folio sends notification
   - **Add**: Additions to this folio sends notification
   - **Modify**: Modifications to the attributes in this folio sends notification
   - **Delete**: Deletions from this folio sends notification
3. Click **Subscribe**. The standard content information page for the folio opens.

9.2.11 Using Digital Asset Baskets

Digital asset baskets are a useful way to collect items checked in to Content Server. You add content to a digital asset basket from the search results page. When collected in a digital asset basket, items can be published to new folios or easily accessed from within existing folios in the Source Items Tray of the Edit Folio Page. You can create multiple baskets with the Manage Content Baskets Page to help organize content by project, author, date, type, or any other way that you find useful.

Content added to digital asset baskets still resides in the repository. It does not change physical locations. Instead, the metadata for items in a digital asset basket updates to reflect the basket or baskets to which a content item is added. Click a digital asset basket link to execute a search for the metadata reflecting that digital asset basket, and return a search result page listing the content items. The same content can be collected in multiple baskets.

9.2.11.1 Managing Digital Asset Baskets

Digital asset baskets are created and deleted using the Manage Content Baskets Page. You can create multiple baskets, but only one basket is active at a time. You can only add content to the active basket.

To create a digital asset basket:

1. Click **My Baskets** in the **My Content Server** tray. The Manage digital asset baskets page opens.
2. Click **Append basket**. A new field is displayed on the page.
3. Enter a name for the basket in the new field.
4. Select **Active** next to the new basket to make it the active basket, otherwise leave disabled. Only the active basket can have content added to it.
5. Click **Update**. The new basket is displayed under **My Baskets** in the **My Content Server** tray.

To delete a digital asset basket:

1. Click **My Baskets** in the **My Content Server** tray. The Manage digital asset baskets page opens.

2. Select **Delete** next to the basket to delete and click **Update**. The basket is removed from the Manage digital asset baskets page and from under **My Baskets** in the **My Content Server** tray.

9.2.11.2 Working with Digital Asset Baskets

You can create multiple digital asset baskets to help organize collected content. Only the active basket can have content added to it. Content is added to the active basket from a search results page. You can move content between baskets, copy content into another basket, and reorder content within a basket.

9.2.11.2.1 Setting the Active Basket

You can set the active basket on the Manage Digital Asset Baskets page.

To set the active basket:

1. Click **My Baskets** in the **My Content Server** tray. The Manage Digital Asset Baskets page opens.
2. Select **Active** next to the basket and click **Update**. The Basket Icon changes, and *Active* is displayed next to the newly active basket under **My Baskets** in the **My Content Server** tray.

9.2.11.2.2 Adding Content to the Active Basket You can add content to the active basket from a search results page.

To add content to the active basket:

1. From a search results page, select the check box next to the item or items you want to add to the active basket.
2. Choose **Add to active basket** from the table **Actions** menu above the check boxes. The Home page opens.
3. To verify that the content is added to the active basket, open **My Baskets** in the **My Content Server tray** and click the active basket icon. The active basket page opens.

9.2.11.2.3 Moving and Copying Content Items If you inadvertently add content to the wrong basket and want to move it, or to reorganize your content into different baskets, you can do so. Also, you can copy content in one basket into another basket, so that it is displayed in both.

To move or copy content items from one basket to another:

1. Open **My Baskets** in the **My Content Server tray** and click the basket link of the basket from which you want to move or copy content.
2. Select the check box next to the item or items you want to move or copy.
3. Choose **Move selected items** or **Copy selected items** from the table Actions menu. The Move Basket Items page or Copy Basket Items page opens.
4. Click the basket to which the items are to be moved or copied. The Home page opens.

9.2.11.2.4 Removing Content Items You can remove items from any digital asset basket.

To remove content items from a basket:

1. Open **My Baskets** in the **My Content Server tray** and click the basket link of the basket from which you want to remove content.
2. Select the check box next to the item or items to remove.
3. Choose **Remove selected items** from the Actions menu. The Home page opens.

9.2.12 Understanding Folio Workflows

When working with folios in a workflow, it is important to remember that technically a folio is an XML file checked in to Content Server that lists associated content in a meaningful way. When a folio is routed in a workflow, it is the associated XML file that is routed. It is the structure of the folio that is reviewed and edited. The items themselves are not routed.

Think of the folio as a list of items. When a folio is routed in a workflow, you are asked to review the list of items, and possibly to update, add to, or rearrange the items. In the example in Section 9.1.2.1, "Structured Organization of Content," a company used a template to create a folio to include information for a sales presentation. The new folio has the latest press releases and company background associated with it automatically, based on the template, and empty slots for slide presentations from several departments pertinent to the prospective client.

In this case, when the folio gets routed through a workflow, the appropriate people are asked to create slide presentations and insert them into the appropriate slots on the folio. The slide presentations they work on can go through any number of separate workflows and be checked in and out any number of times, but the folio won't move on in the workflow until content is associated with the specified empty slots. After that is done and the folio moves out of workflow, the folio is associated with the latest revisions of the content items listed in the folio, until a snapshot of the folio is taken or the folio is locked.

10

Using Images and Videos

This chapter describes how to quickly find, group, convert, and download images and videos of various sizes, formats, and resolutions from within Oracle WebCenter Content Server using the Digital Asset Manager functionality.

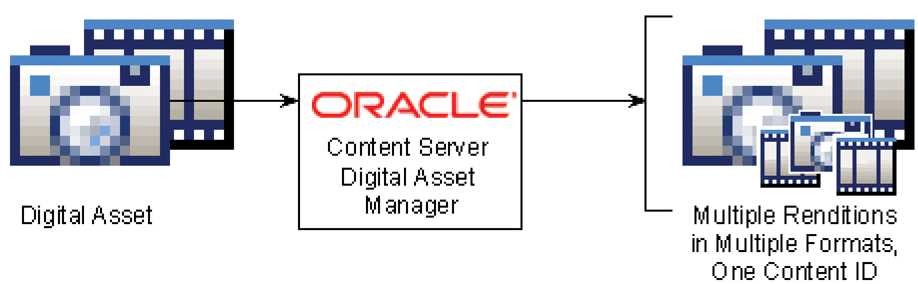
This functionality is installed but disabled by default. Your system administrator chooses whether to enable this functionality for your site. The chapter covers the following topics:

10.1 About Digital Asset Manager

Digital Asset Manager enables you to quickly find, group, convert, and download images and videos of various sizes, formats, and resolutions to meet your business requirements, while maintaining a consistency of use across your organization. For example, an organization may have a logo in a variety of sizes for advertisements, Web pages, and presentation, or a training video in a variety of formats for streaming on an intranet, presenting to an audience, or copying to tape.

Work with your system administrator and other contributors to define the appropriate size and output. At check in, the digital asset is automatically converted into the defined formats and sizes, known as renditions. You can then search for the asset using standard metadata or closed-caption text if it is a video asset. From the Rendition Information page you can add renditions to a digital asset basket and download a single compressed file that contains all of the renditions.

Figure 10–1 Overview



Digital Asset Manager adds the following pages to Oracle Content Server:

- Rendition Information Page
- Video Preferences Page
- Digital Asset Basket Page
- Add a Rendition Page
- Rendition Parameters Page
- DAM Search Fields Administration for *content-server* page
- Link E-Mail Confirmation
- Image Data page
- Add/Edit Attachments page

Digital Asset Manager also adds functionality to the Content Check In, Content Information, Content Information Update pages, all search result pages, and the **My Content Server** tray.

10.2 Working with Digital Asset Manager

This section covers the following topics:

- Section 10.2.1, "About Using Digital Asset Manager"
- Section 10.2.2, "Supported Input Formats"
- Section 10.2.3, "Supported Video Output Formats"
- Section 10.2.4, "Checking In a Digital Asset"
- Section 10.2.5, "Finding Renditions and Information"
- Section 10.2.6, "Rendition Information Page"
- Section 10.2.7, "Image Data Page"
- Section 10.2.8, "Rendition Parameters Page"
- Section 10.2.9, "Video Preferences Page"
- Section 10.2.10, "Working with Renditions"
- Section 10.2.11, "Working with Standard Content Items"
- Section 10.2.12, "Digital Asset Manager on a Macintosh Client"

10.2.1 About Using Digital Asset Manager

Digital Asset Manager enables you to create and find images and videos in specified formats and sizes. Digital Asset Manager can help your organization maintain consistent standards for branding and asset use, while providing the right content to the right people in the right format.

Digital Asset Manager creates multiple formats of digital assets automatically when they are checked in to Oracle Content Server, and lists the formats under one content ID. Digital assets, such as a corporate artwork or commercial videos, maintain a standard size and quality in each format required by your organization. The content management and workflow features of Oracle Content Server uses only approved versions because Digital Asset Manager creates them from a single source managed by Oracle Content Server.

If you use digital assets, Digital Asset Manager gives you the confidence that you are using the approved asset in the proper format. For example, an image of the logo in a format for use on a Web-site can be bundled and downloaded with other formats of the logo for use in office presentations or print collateral, all from a single digital asset checked in to Oracle Content Server. Or, a low-bandwidth version of a training video can be posted to a streaming server while a high-bandwidth version can be provided to a vendor for replication to tape or DVD.

Each format created by Digital Asset Manager is called a rendition. Each image rendition includes information about size, color, format, and other criteria defined by your system administrator. Each video rendition includes information about display size, bandwidth, and expected use. Renditions are grouped into rendition sets. When you check in a digital asset, you choose a rendition set, which then determines what renditions are created for the asset. When finding a digital asset for use, all renditions of the asset are listed on the asset's Rendition Information page, and are available for download.

Figure 10–2 Example Image Rendition Set and Resulting Rendition Listing

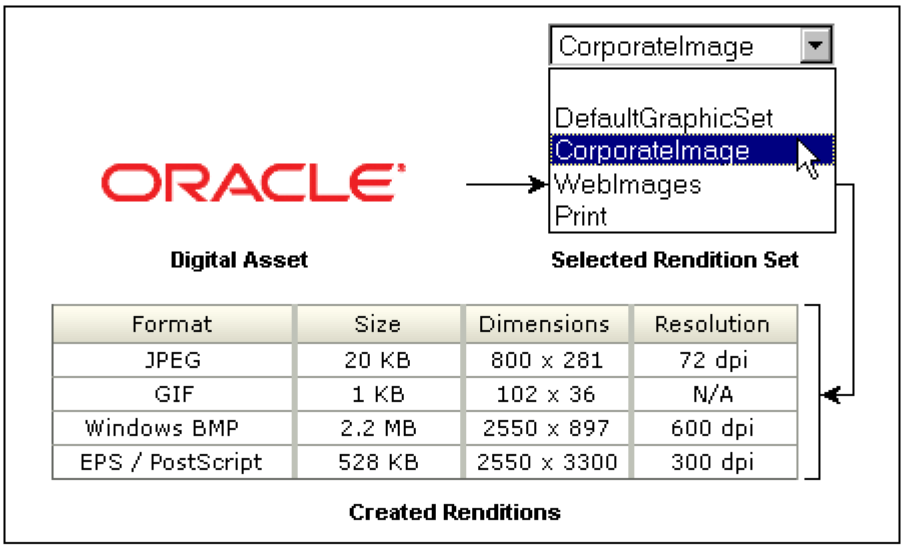
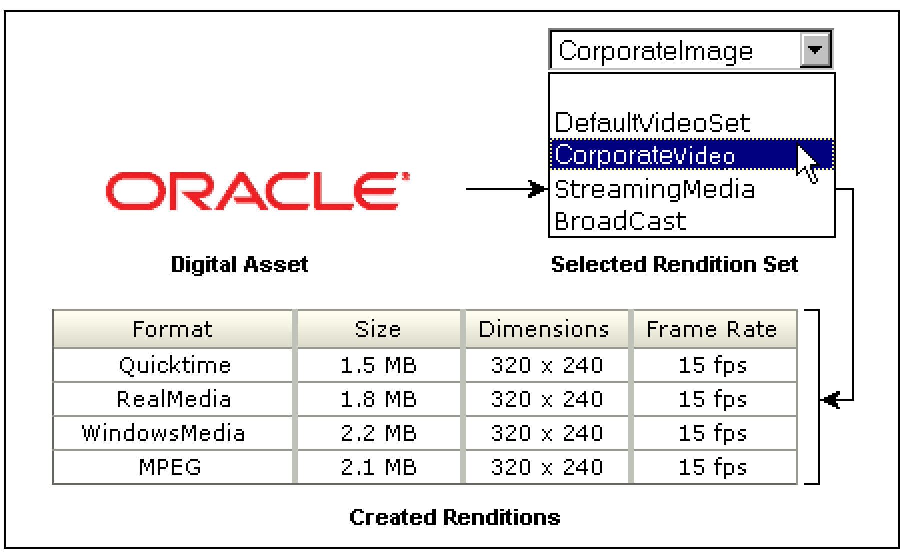


Figure 10–3 Example Video Rendition Set and Resulting Rendition Listing



10.2.2 Supported Input Formats

Supported input formats are determined by the graphic or video conversion application as set up by your system administrator.

Image Input Formats

Common image input formats include the following:

- JPG/JPEG (Joint Photographic Expert Group)
- GIF (Graphics Interchange Format)
- BMP (Bitmap)
- PNG (Portable Network Graphics)
- TIFF (Tag Image File Format)
- PSD (Adobe Photoshop)
- AI (Adobe Illustrator)
- PDF (Portable Document Format)

Image Video Formats

Common video input formats include the following:

- Flash Media Format
- MPEG Layer 3 and 4 Elementary Stream Media Format
- PacketVideo MPEG4 Format
- QuickTime Media Format
- QuickTime Streaming Format
- Windows Media Format
- AVI Media Format
- DVD Stream Media Format
- MPEG1 System Stream Media Format
- MPEG2 Program Stream Media Format
- MPEG2 Transport Stream Format
- MPEG4 Media Format
- Pinnacle MediaStream Media Format

For a comprehensive listing of supported format, see the conversion application documentations.

Formats supported by the conversion application must also be associated with the conversion process within Oracle Content Server by the system administrator using the Oracle Content Server Configuration Manager. If a supported format is not rendering, see your system administrator.

10.2.3 Supported Video Output Formats

Output formats are limited to what your browser displays effectively. Only output formats supported by Windows Media Player, Real Player, Flash Player, or Quicktime Player are available for viewing in your Web browser. Any assets rendered in a format not supported by those players is still be managed by Oracle Content Server, but is available only for download only.

Digital Asset Manager currently supports the following video output formats:

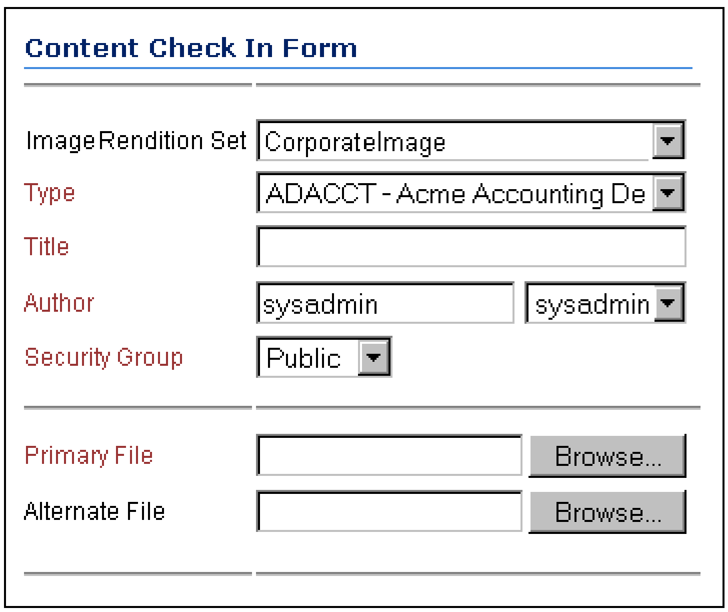
- MPEG Layers 1, 2, and 4 (.mpg, .mpeg, .mp2, .mp4)
- Quicktime (.mov)
- Audio Video Interleave (.avi)
- Flash Video (.flv)

Other output formats not listed here but supported by your media player may work when set up properly by your system administrator. For additional format requests, see your system administrator. For information on formats supported by your media player, see the player's help system.

10.2.4 Checking In a Digital Asset

With Digital Asset Manager installed, the Rendition Set list is displayed.

Figure 10–4 Content Check in Form with Rendition Set List



To check in a digital asset, perform these steps:

1. Open the content check-in form.
2. Choose a rendition set from the Rendition Set list.
3. Enter a title and any additional metadata for the asset. The title you enter must be 249 or fewer characters in length.
4. Click **Browse** to locate the primary file.
5. Click **Check In**. The Check In Confirmation page opens.

Oracle Content Server uses the file extension, such as .psd, .jpg, .mov, or .avi, to determine if an item is a digital asset. Digital assets checked in to Oracle Content Server must have the correct file extension appended to the file name. For example, a

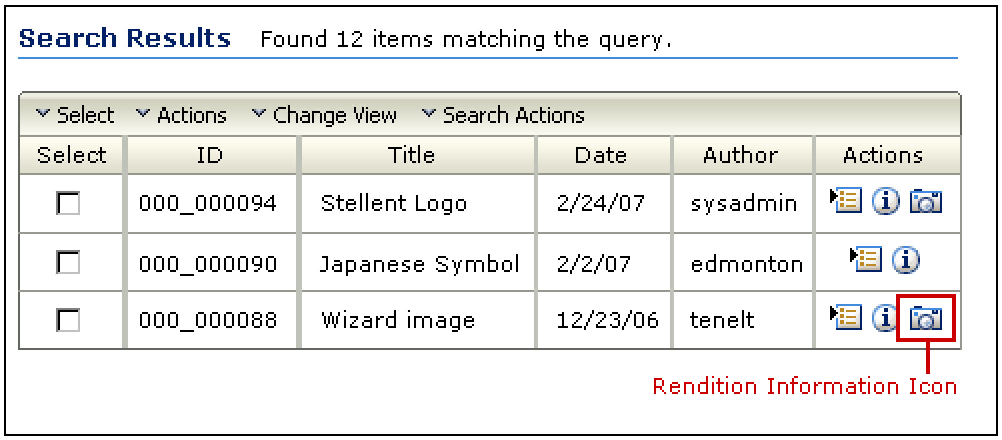
Photoshop file named CorporateLogo.psd is correctly identified by Oracle Content Server as a digital asset, but one named CorporateLogo is not.

Do not select an alternate file when checking in a digital asset. Doing so prevents the primary file from rendering.

10.2.5 Finding Renditions and Information

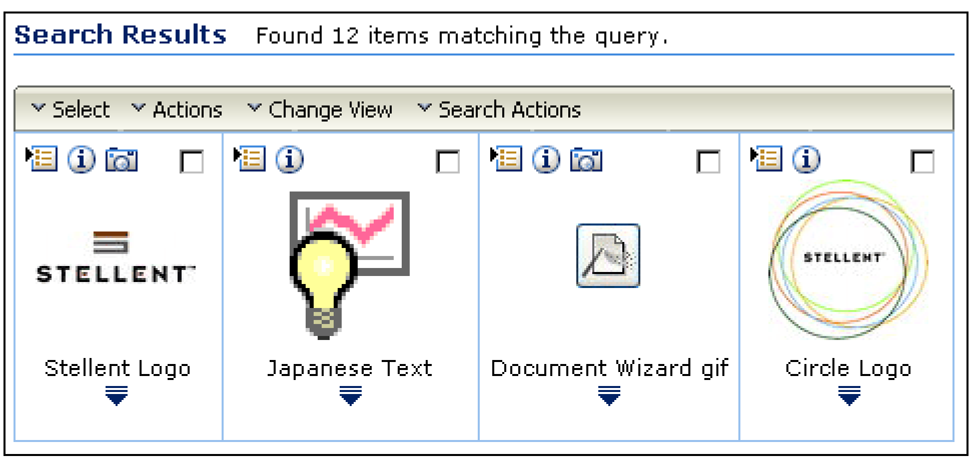
Digital Asset Manager builds on the functionality of Oracle Content Server. Searching for digital assets is identical to searching for other types of content. Digital assets have an additional icon displayed in the standard search results page. The Rendition Information icon links to the Rendition Information page of the asset.

Figure 10–5 Search Result Page with Rendition Information Icon



Because you are working with images and videos, you may want to set your default search result view to Thumbnail View. To do so, choose **Thumbnail View** from the **Content Actions** menu on a search results page.

Figure 10–6 Thumbnail View Search Results Page.

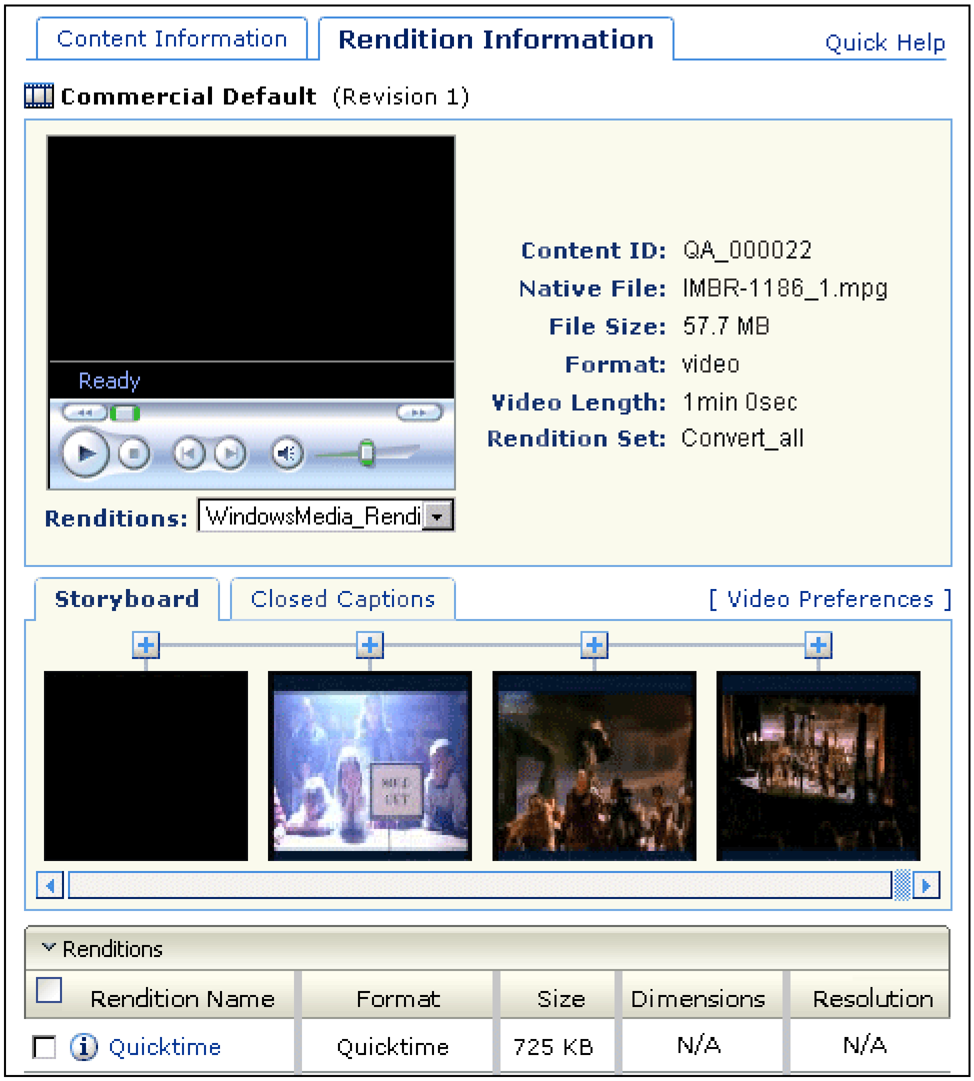


10.2.6 Rendition Information Page

When a digital asset is checked in to Oracle Content Server, multiple renditions are created based on the rendition set chosen at the time of check in. Just like with standard content, information about the original content item is indexed and displayed on the Content Information page. However, with a digital asset, information about the created renditions is also displayed on the Rendition Information page, and on the story board and any closed-captioned text for video assets.

To access the Rendition Information page, click the associated link on the Content Information page, or from a search result page using the **Rendition Information** icon or the **Rendition information** link in the item **Actions** menu.

The Rendition Information page lists the renditions of an asset and provides a variety of information about each rendition.

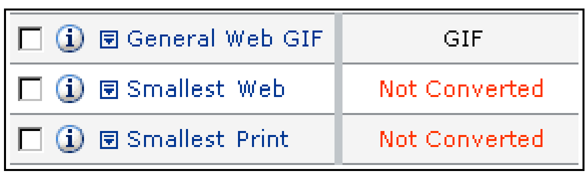


Page Item	Description
Content Information	Displays the Content Information page for the digital asset, showing metadata indexed by Oracle Content Server and a listing of any revision history of the asset. It also provides access to actions for content items.
Preview section	Shows a Web-viewable rendition of the content item with minimal metadata. For an image asset, click the preview image to display the primary rendition in a new window. The system administrator specifies the primary image. It is typically larger than the preview image.

Page Item	Description
Renditions list (video asset only)	Switches the rendition format in the preview section, based on available rendition formats.
Content ID	The unique identifier used by Oracle Content Server to manage the digital asset. Specified at check in.
Native File	The name of the source file of the digital asset.
File Size	The storage size of the source file.
Format	Identifies the format of the native file, the `mime` type.
Video Length (video asset only)	Specifies how much time it takes to play the full video.
Rendition Set	Identifies the metadata option selected when the digital asset was checked in that determines what renditions are created.
Navigation section (video asset only)	Provides options for navigating through a digital asset using keyframes in a storyboard, or closed caption text if it is available.
Storyboard (video asset only)	Displays a series of keyframes from various intervals in the video. Click a keyframe to initiate the video at that point in the preview section. You can configure the number of keyframes displayed on the Video Preferences page. Click the plus icon above a keyframe to expand the storyboard, inserting additional keyframes after the one whose icon was clicked. The storyboard enables you to drill down to view keyframes representing shorter intervals of time in the video.
Closed Captions (video asset only)	Displays the closed captioned text of a video if it is available. Click the icon next to a line of text to initiate the video at that point in the preview section. If no closed captioned text is available in the video, this tab is not displayed.
Video Preferences (video asset only)	Displays the Video Preferences page, on which you can specify the video format and bandwidth preference for the preview on the Rendition Information page, and the number of keyframes displayed.
Plus/Minus icon (video asset only)	Click the plus icon above a keyframe to expand the storyboard, inserting additional keyframes after the one whose icon was clicked. Click **Refresh** in the upper right of page to collapse all opened keyframes.
Renditions section	Lists the renditions stored under the content ID.
Rendition Name	Name for each rendition, defined in the rendition set chosen at the time the digital asset was checked in or updated.
Rendition Name Info icon	Displays the Rendition Parameters page. The Rendition Parameters page lists information about the parameters of the specific rendition as logged by the conversion application when the rendition was created. This information is valuable to you if you want detailed information about the rendition creation process, or about rendition parameters otherwise unavailable to you.
Rendition Name Description icon (image asset only)	Displays a more detailed description of the rendition. If no icon is present, then no description exists for the rendition.
Format	Identifies the rendition's file format, or way of organizing and storing the information in the rendition file, as the `mime` type. If an image rendition fails, then the format column displays `Not Converted` for that rendition. Click the Rendition Name Info Icon of a failed rendition to display the Rendition Parameters page with information about the cause of the failure.

Page Item	Description
Size (video asset only)	Lists the required storage size of a rendition.
Dimensions (video asset only)	Lists the height and width, in pixels, of a rendition.
Framerate (video asset only)	The rate at which each frame of a video is presented, specified in Frames Per Second.
Renditions menu	Download: Bundles the selected renditions into a single compressed file and copies the file to a local or networked storage space. Add to Basket: Adds the selected renditions and the native file to the digital asset basket. E-mail Links: Opens a prompt that enables the user to enter one or more e-mail addresses. Then the e-mail is generated and sent from within the server, after which a confirmation page is shown that displays the format of the e-mail. The URL links to the selected rendition or native file are copied into the body of a new message. Delete: (image asset only) Removes selected renditions from the rendition set. Add a New Rendition: (image asset only) Displays the Add a Rendition page, enabling a user to manually attach a file to the existing rendition set.

Figure 10–7 Rendition Parameters listing with information about the cause of the failure.



Accessing The Rendition Information Page

To access the Rendition Information page of a digital asset from any page in Oracle Content Server, perform one of these steps:

1. Search for the digital asset for which to view rendition information.
2. Click the **Rendition Information** icon next to the appropriate digital asset on a search results page, or choose **Rendition Information** from the item **Action** menu. The Rendition Information page opens.

Alternately, you can access the Rendition Information page from the digital asset basket by performing these steps:

1. Click the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.
2. Click the **Rendition Information** icon next to the appropriate digital asset in your digital asset basket. The Rendition Information page opens.

When the Rendition Information page opens, click the tabs at the top of the page to switch between the Content Information page, the Rendition Information page, and the Image Data page for the asset.

10.2.7 Image Data Page

The Image Data page displays information about the native image file checked in to Content Server. However, what that information is and how it is displayed is contingent on:

- The specific information the camera or application captures, and
- Whether the image is generated by a digital camera or an application (such as Photoshop).

Image Information

The specific information that is displayed is dependent on the type of camera or application used to generate the image. Different digital cameras collect different information, depending on the camera features and capabilities.

Additionally, one camera might have a built-in GPS system and can record GPS coordinates into the image file. Another camera might not have that capability, and so wouldn't be able to output that information to the Image Data page. Similarly, an application such as Photoshop may generate information specific to its feature set while Paint Shop Pro would generate different information specific to its different feature set.

Display Formats

How the information is displayed on the **Image Data** tab is dependent on whether the native image file is a JPEG from a digital camera or if it is from an application. Digital cameras store information using the EXIF standard (Exchangeable Image File format), which is a subset of the XMP standard (Extensible Metadata Platform). Both methods use the Oracle Outside In filters to generate XML to structure the data.

If the image is a JPEG from a digital camera, Outside In specifies the document type as JPEG File Interchange, and the EXIF data is displayed on the **Image Data** tab in a flat listing. If the image is from an application such as Adobe Photoshop, Outside In specifies the document type as coming from the application (for example, `document type="Adobe Photoshop"`), and the XMP data is displayed on the **Image Data** tab with some hierarchical structure.

Note: If the image is a digital photograph that has been manipulated in Photoshop, the EXIF data gets aggregated and formatted as part of the XMP data, because EXIF is a subset of XMP.

Figure 10–8 shows the contents of the **Image Data** tab for a checked in digital photo. In this case, the information includes the image thumbnail and the photo's digital properties.

Figure 10–8 Image Data Page of a Digital Photo

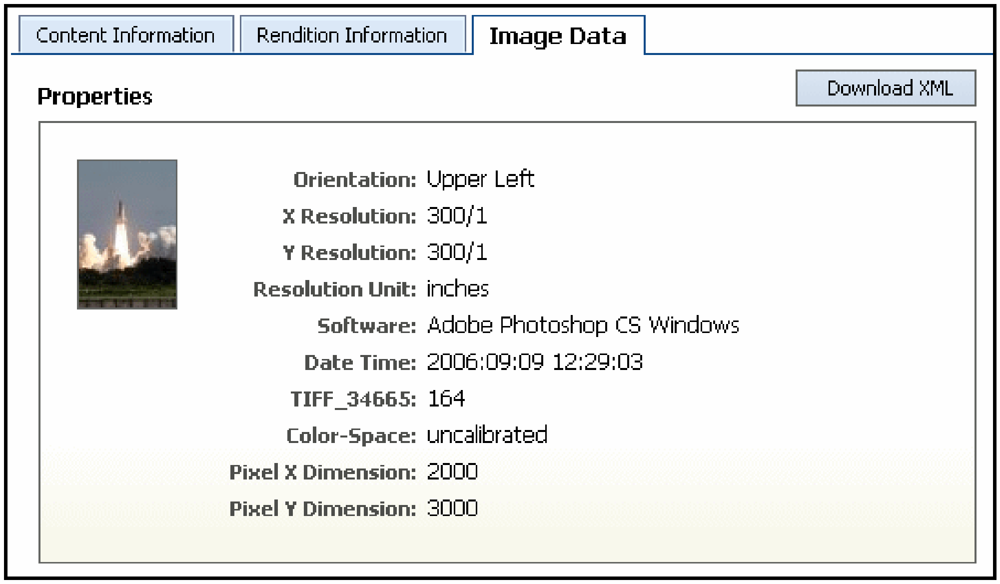
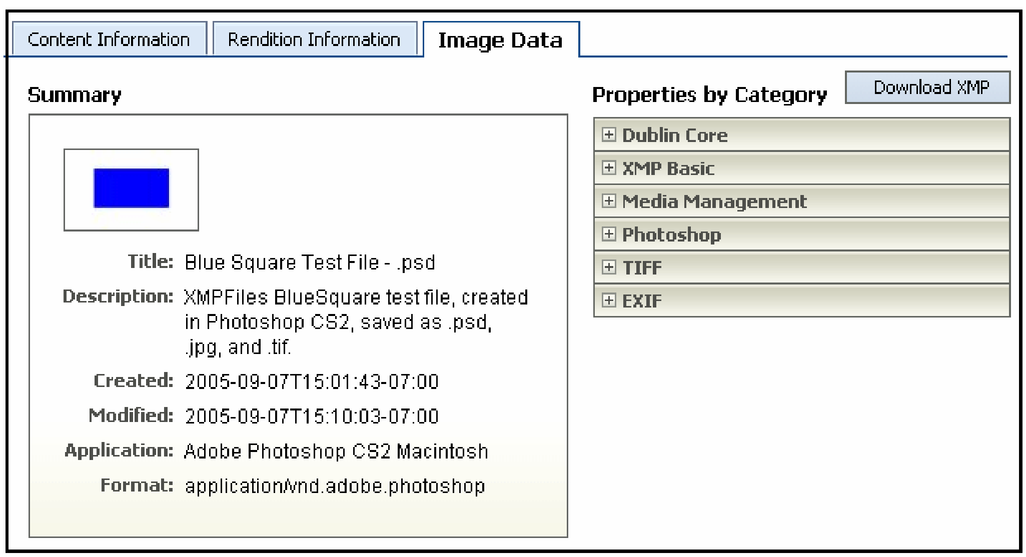


Figure 10–9 shows the contents of the **Image Data** tab for a Photoshop document with the XMP data displayed in a hierarchy.

Figure 10–9 Image Data Page of a Photoshop Image



Accessing the Image Data Page

To access the Image Data page of a digital asset from any page in Oracle Content Server, perform one of these steps:

1. Search for the digital asset for which to view rendition information.
2. Navigate to either the Rendition Information page or the Content Information pages, and click the **Image Data** tab
3. Click the **Image Data** tab.

Alternately, you can access the Image Data page from the digital asset basket by performing these steps:

1. Click the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.
2. Click the **Rendition Information** icon next to the appropriate digital asset in your digital asset basket. The Rendition Information page opens.

When the Image Data page opens, click the links at the top of the page to switch between the Content Information page, the Rendition Information page, and the Image Data page for the asset.

10.2.8 Rendition Parameters Page

To access the Rendition Parameters page, click the **Rendition Name Information** icon next to a rendition name on the Rendition Information page.

If an image rendition fails, the format column in the Renditions section of the Rendition Information page displays `Not Converted` for that rendition. In the case of a failed rendition, the Rendition Parameters page displays information about the cause of the failure.

Figure 10–10 Example of an image Rendition Parameters page.

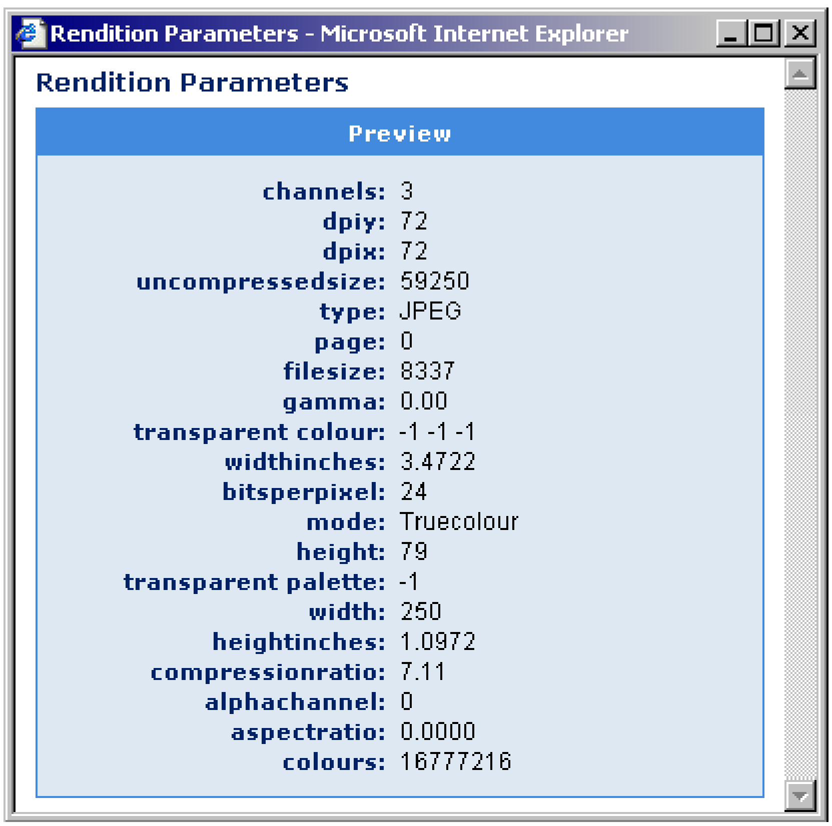
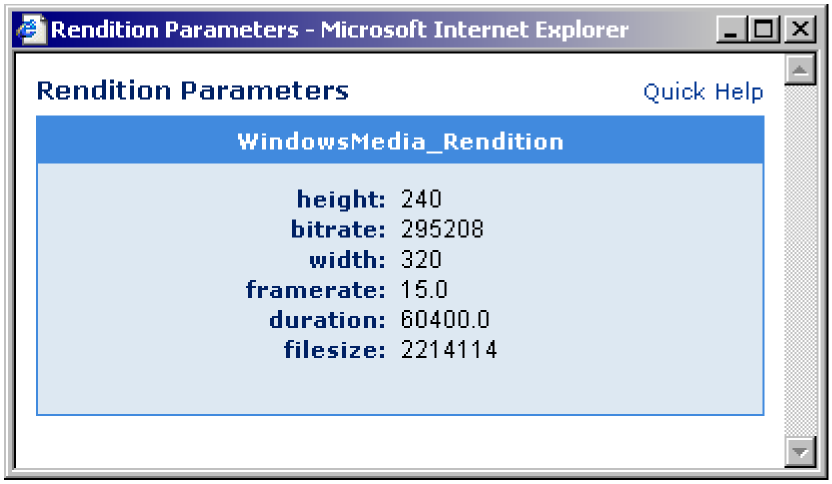


Figure 10–11 Example of a Video Rendition Parameters Page.



Accessing The Rendition Parameters Page

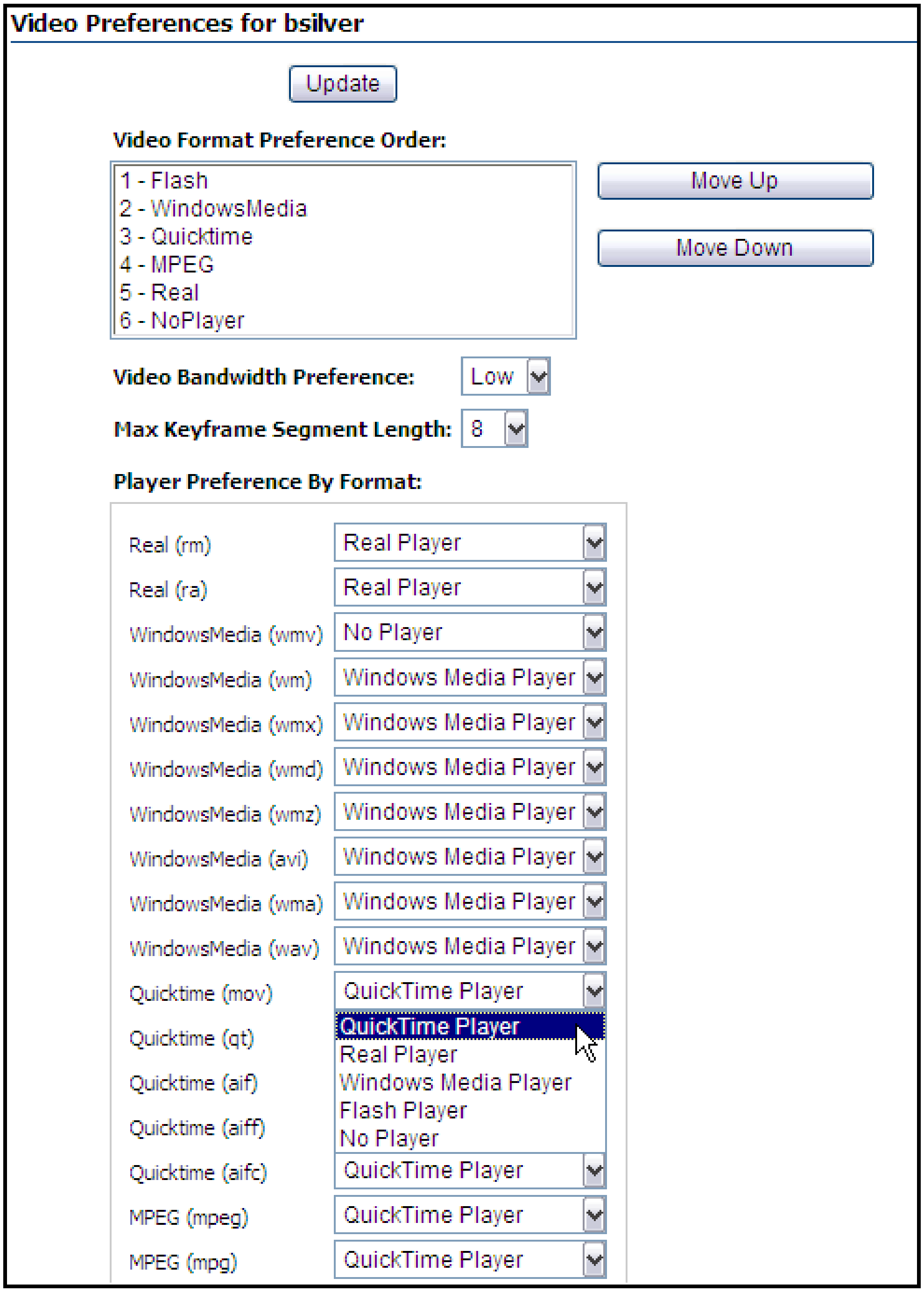
To access the parameters of each specific rendition, perform these steps:

1. Access the Rendition Information page.
2. Click the **Rendition Name Info** icon. The Rendition Parameters page opens.

10.2.9 Video Preferences Page

To play a video rendition, use the preview section of the Rendition Information Page or click a Web-viewable link on the Content Information, digital asset basket, or search results pages. Digital Asset Manager determines what format to use as the default for the preview window based on information you specify on the Video Preferences page. You can also specify the number of keyframes displayed in the storyboard on the Rendition Information page, and your preferred bandwidth for the preview.

Other features of the Video Preferences page enable you to specify a video player for each rendition format and to set a No Player Option and a No Format Option for both that affect the preview display on the Rendition Information Page. To open and play renditions in a standalone player, click the rendition name in the rendition section of the Rendition Information page. The player chosen is then determined by file format and helper application settings unique to your computer and browser, outside of Video Manager.



Accessing the Video Preferences Page

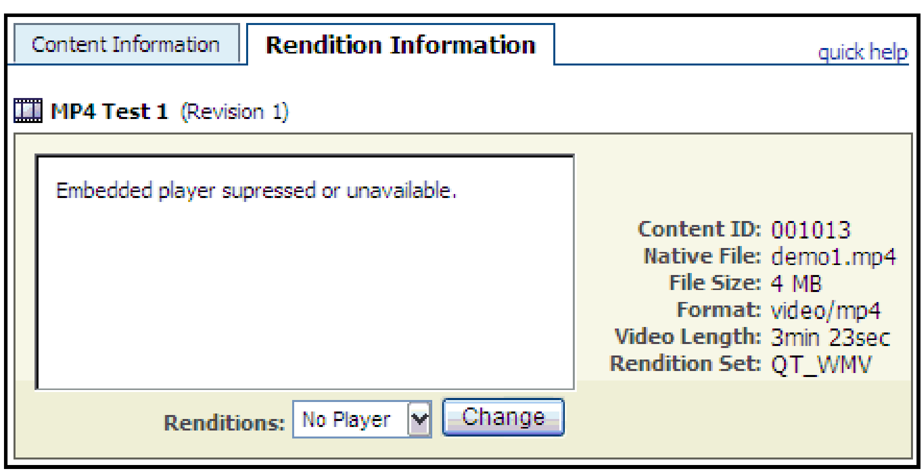
To access the Video Preferences page, perform these steps:

1. Access the Rendition Information page, or click the **My Content Server** tray.
2. Click **Video Preferences**. The Video Preferences page opens.

Page Item	Description
Video Format Preference Order	Specifies the preferred media format used in the Rendition Information page preview section for renditions, and with a rendition's Web-viewable link in a search result, digital asset basket, or content information page. Because a rendition set may not have a rendition in the preferred format, Video Manager plays the rendition using the first available format found in the order listed here. The NoPlayer option enables you to suppress one or more of the media formats here, depending on your preference. The placement of the NoPlayer option determines what media format is available. For example, if you move the NoPlayer option immediately following WindowsMedia, then all other formats are ignored. For more information, see Section 10.2.9.1, "No Format Option."
Move Up	Moves a selected media format up in the preference order.
Move Down	Moves a selected media format down in the preference order.
Video Bandwidth Preference	Specifies the preferred size of streaming and local videos by using the size information from the rendition listing. Low: Smaller video best suited when connecting to Video Manager using a modem to dial in. High: Larger video best suited when connecting to Video Manager through a high speed connection, such a corporate network or broadband internet connection.
Max Keyframe Segment Length	Specifies the maximum number of keyframes displayed at each drill-down level in the storyboard section of a Rendition Information page.
Player Preference By Format	Enables you to specify a video player for each media format included in the list. For more information, see Section 10.2.9.2, "No Player Option."
Update	Submits changes made to the Video Preferences page.

10.2.9.1 No Format Option

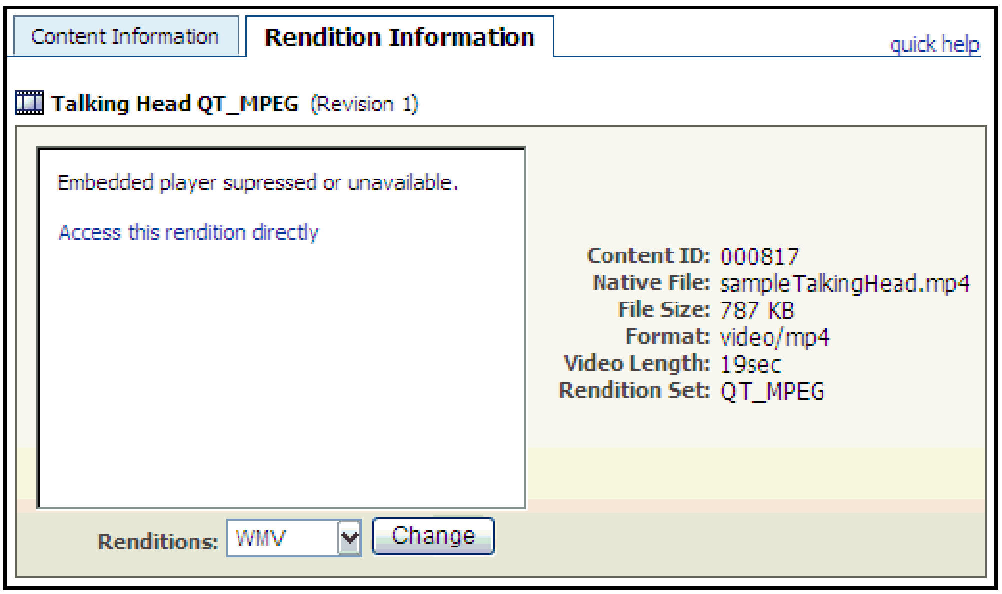
Depending on what priority you have assigned to the No Format option in the Video Format Preference Order section on the Video Preferences Page, the preview area of the Rendition Information Page may or may not display the video preview player. For example, the following graphic illustrates that this rendition set does not contain any preferred video format. That is, all formats available in this set appear below the No Format option in the Video Format Preference Order which means that they have been suppressed.



10.2.9.2 No Player Option

The Player Preference By Format section of the Video Preferences Page enables you to set a video player for each media format included in the list. For example, if you set the preference for Quicktime to be No Format, then this option suppresses that format in the preview area of the Rendition Information Page as illustrated in the following graphic. Click **Access this rendition directly** to open a new window and play the video using the applicable default player.

Note: The No Format Option placement always overrides the selected settings for media formats listed in the Player Preference By Format section.



10.2.10 Working with Renditions

Digital Asset Manager not only creates renditions automatically, it provides a personal space where you can store renditions you are currently working on, called the digital asset basket. Your digital asset basket is unique to you, and contains only the renditions you choose to include.

You can add items to your digital asset basket from a search results page, from the Rendition Information page, or from the Content Information page. To view the items in your digital asset basket, click **My Baskets** and then **Digital Asset Basket** in the My Content Server tray.

By design, the digital asset basket can contain renditions from different revisions of the same digital asset. If you use your basket to quickly find a rendition of an asset, such as a corporate logo or video, remember that you may not be accessing the most recent revision of the asset. If a newer revision has been checked in to Oracle Content Server, a notification is displayed next to the revision number in the Description column. Click the notification to display the Content Information page of the latest revision.

You can do the following tasks with renditions:

- Section 10.2.10.1, "Storing Renditions in Your Digital Asset Basket"

- Section 10.2.10.2, "Viewing Items in Your Digital Asset Basket"
- Section 10.2.10.3, "Removing Items from Your Digital Asset Basket"
- Section 10.2.10.4, "Adding and Removing Renditions in a Rendition Set"
- Section 10.2.10.5, "Downloading Multiple Items"
- Section 10.2.10.6, "Creating Renditions"
- Section 10.2.10.7, "Updating Renditions"

10.2.10.1 Storing Renditions in Your Digital Asset Basket

You can store any rendition from any revision of a digital asset in your digital asset basket, and the Web-viewable or native file from any revision of a content item, provided the revision is released by Oracle Content Server.

From the digital asset basket, you can select renditions from one or multiple assets to be compressed into a single file and downloaded to a local or networked drive, or send links to selected renditions in an e-mail. You can also use the digital asset basket to access the content information and rendition information pages of content items and digital assets.

You can add items to your digital asset basket from the following pages:

- Rendition Information page (native file and all renditions)
- Content Information page (native and Web-viewable files only)
- Search Results page (native and Web-viewable files only)

When you add a rendition to the digital asset basket, it may not be listed at the top of the digital asset basket page. Items in the digital asset basket are listed in descending order first by content ID and then by revision number. If a rendition of a content item revision is in the digital asset basket, additional renditions are added to that revision's listing. Additionally, if a newer revision of a content item in your digital asset basket has been checked in to Oracle Content Server, a notification is displayed next to the revision number in the Description column. Click the notification to display the Content Information page of the latest revision.

To add renditions to your digital asset basket from the Rendition Information page, perform these steps:

1. Access the rendition information page of an asset. The rendition information page opens.
2. Select the check box next to a rendition to add the rendition to your digital asset basket.
3. From the **Renditions** list, choose **Add to Basket**. The Digital Asset Basket page opens with the renditions you selected listed in the Selected Renditions column of the item.

To add all renditions to your digital asset basket, select all items. You do not have to select the check box next to any rendition if using this option.

To add the native or Web-viewable file to your digital asset basket from the Content Information page, perform the following steps:

1. Access the Content Information page of an item.
2. From the **Content Actions** menu, choose one of these:
   - **Add Native File to Digital Asset Basket**

- **Add Web-Viewable File to Digital Asset Basket**

The Digital Asset Basket page opens with the selected items listed in the Selected Renditions column of the item.

You cannot add both the native file and the Web-viewable file to the digital asset basket at the same time using the Content Information page. If the item is a digital asset and has a Rendition Information page, use it to add multiple items to the digital asset basket at the same time.

To add the native or Web-viewable file to your digital asset basket from a search results page, perform the following steps:

1. From a search results page, select the check box next to the item or items you want to add to your digital asset basket.
2. From the **Content Actions** menu, choose either of these items:
   - **Add Native Files to Digital Asset Basket**
   - **Add Web-Viewable Files to Digital Asset Basket**

   The Digital Asset Basket page opens with the selected items listed in the Selected Renditions column of the item.

To add all native or Web-viewable items on a search results page to your digital asset basket, choose **All** from the **Select** menu. You do not have to select the check box next to any item if using this option. Also, Web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. You cannot download them from the digital asset basket. To download a rendition, use the Rendition Information page.

10.2.10.2 Viewing Items in Your Digital Asset Basket

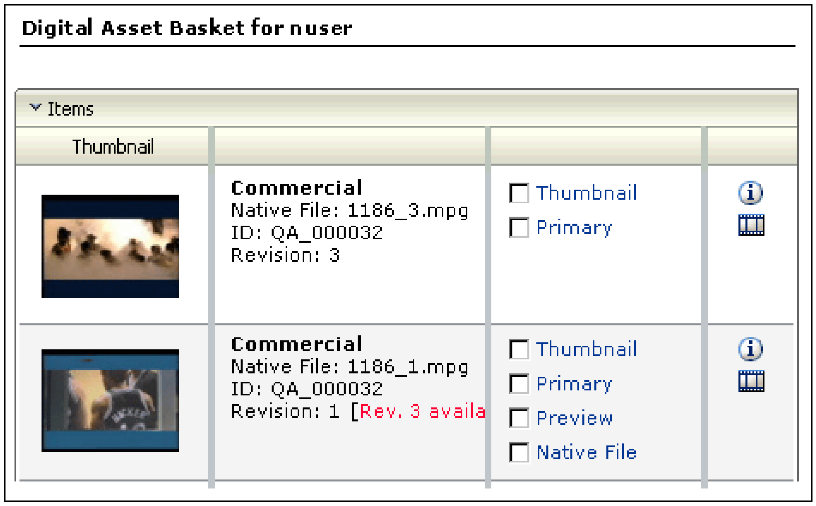
To access the digital asset basket, click **My Basket** and then **Digital Asset Basket** in the **My Content Server** tray. From the digital asset basket, you can select renditions from one or multiple assets to be compressed into a single file and downloaded to a local or networked drive, or send links to selected renditions in an e-mail. You can also use the digital asset basket to access the content information and rendition information pages of content items and digital assets.

To access the Digital Asset Basket page, perform these steps:

1. Click the **My Content Server** tray.
2. Click **My Baskets**.
3. Click **Digital Asset Basket**.

   The digital asset basket page opens.

Digital Asset Basket Page



Page Item	Description
Thumbnail	Opens the Web-viewable rendition in a separate window. Your system administrator specifies the Web-viewable rendition. It is typically larger than the thumbnail or preview renditions. For video assets, you determine the Web-viewable rendition based on the choices you make on the Video Preferences Page.
Description	Title, native file, Content ID, and Revision metadata of the content item. If a newer revision of the content item has been checked in to Oracle Content Server, a notification is displayed next to the revision number. Click the notification to display the Content Information page of the latest revision.
Selected Renditions	Listing of all renditions of a content item saved to the digital asset basket.
Content Info icon	Links to the Content Information page of an item.
Rendition Info icon	Links to the Rendition Information Page of an item.
Items menu	■ Download: Bundles the selected items into a single compressed file and copies the file to a local or networked storage space. Web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. You cannot download them from the digital asset basket. To download a rendition, use the Rendition Information Page. ■ E-mail Links: Opens a prompt that enables the user to enter one or more e-mail addresses. Then the e-mail is generated and sent from within the server, after which a confirmation page is shown that displays the format of the e-mail. The URL links to the selected items are copied into the body of a new message. ■ Remove: Removes the selected items from the digital asset basket. ■ Empty Basket: Removes all items from the digital asset basket.

Items in the digital asset basket are listed in descending order first by content ID and then by revision number. If a rendition of a content item revision is in the digital asset basket, additional renditions are added to that revision's listing.

10.2.10.3 Removing Items from Your Digital Asset Basket

Because you can store renditions from different revisions of a digital asset in the digital asset basket, renditions listed in the digital asset basket are not necessarily the latest revision. It is a good idea to remove the renditions from your digital asset basket when you no longer require them.

You can store a link to the most recent revision of any content item in Oracle Content Server by searching for the item's content ID, then choosing **Save Search** from the **Content Actions** menu on the search result page. The link is saved in the My Saved Queries folder in your **My Content Server** tray. Click the saved search link to always access the most recent revision of a content item.

To remove individual renditions from your digital asset basket:

1. Click the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.

   The digital asset basket page opens.

2. Select the check box next to the renditions to be removed in the Selected Renditions column on the digital asset basket page.
3. Choose **Remove** from the **Items** menu.

   The items are removed from the digital asset basket.

To remove all items from your digital asset basket:

1. Click the **My Content Server** tray, click **My Baskets**, and then click **Digital Asset Basket**.

   The digital asset basket page opens.

2. Choose **Empty Basket** from the **Items** menu.

   All items in the digital asset basket are removed. You do not have to select the check box next renditions when removing them all from your basket.

Removing renditions and other items from your digital asset basket does not remove them from Oracle Content Server. You can remove renditions and other items from Oracle Content Server using the Rendition or Content Information pages. Renditions and other items listed in your digital asset basket are not available if they have been removed from Oracle Content Server.

10.2.10.4 Adding and Removing Renditions in a Rendition Set

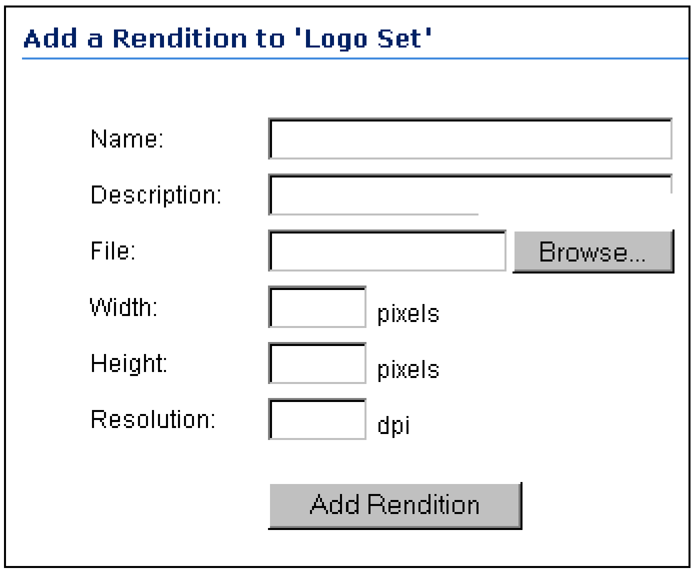
Digital Asset Manager automatically creates multiple renditions of digital assets and manages them in Oracle Content Server under one content ID. Digital Asset Manager provides the content management and workflow benefits of Oracle Content Server while ensuring that you have access to all the types of renditions you need. One content ID provides single-point access to all items relevant to the digital asset.

In some situations, you may want to associate an additional rendition or other file to a digital asset, or remove a rendition that is no longer useful. For example, you may need a rendition that is a slightly different size than the one created by the rendition set, or uses a different color palette, so you want to add the new one and remove the old one. Or, you may have a text file with instructions to a vendor on how they are to use a logo. Files such as these can be added to a digital asset's existing set of renditions using the Add a Rendition page, accessed from the Rendition Information page, and removed directly from the Rendition Information page.

Add a Rendition Page

You can access the Add a Rendition page from the **Renditions** menu on the Rendition Information page of an asset. An added rendition is assumed to be a graphic file, and metadata fields on the Add a Rendition page allow you to manually add information pertinent to graphic renditions. Added renditions can be any type of file, however. For example, if you have a text file with instructions on how to output a PDF file, you can attach the text file as a rendition of the original asset. You should note, though, that Oracle Content Server does not manipulate added renditions. It does not modify a rendition based on information entered into the metadata fields, nor does it convert an added rendition to a Web-viewable format, nor index it for searching.

- Metadata on the Add a Rendition page is for information only. It does not change the size of an added graphic file, and it does not get indexed for searching.
- You can add any type of file as a rendition. It does not have to be a graphic file. To view added renditions, you must have the native application or suitable viewer for the added rendition's file format.



Page Item	Description
Name	A descriptive name given to the attached file, listed in the Rendition Name column on the Rendition Information page.
Description	Description of the attached file, listed on the Rendition Information page when the Rendition Name Description icon is clicked.
File	Used to locate the file to be attached.
Width	Used to specify the width of the attached file in the Dimensions column on the Rendition Information page. This option applies to graphic files.
Height	Used to specify the height of the attached file in the Dimensions column on the Rendition Information page. This option applies to graphic files.
Resolution	Used to specify the resolution of the attached file in the Resolution column on the Rendition Information page. This option applies to graphic files.

To add a rendition to an existing rendition set:

1. Access the Rendition Information page.
2. Choose **Add New Rendition** from the **Renditions** menu. The Add a Rendition page opens.
3. Enter a name for the rendition in the Name field (required). The name is displayed in the Rendition Name column of the Rendition Information page.
4. Enter a description for the rendition in the Description field (optional). To display the description, click the **Rendition Name Description** icon in the Rendition Name column of the Rendition Information Page.
5. Click **Browse** to locate the rendition or other file you want to add to the rendition set (required). You can select any type of file.
6. Fill in the pixel dimensions and resolution information in the Width, Height, and Resolution fields (optional).
7. Click **Add Rendition**. The Rendition Information page opens, showing the added rendition.

   Metadata on the Add a Rendition page is for information only. It does not change the size of an added graphic file, and it is not indexed for searching.

To delete a rendition from an existing rendition set:

1. Access the Rendition Information page.
2. Select the check box next to the rendition you want to delete. You can select multiple renditions to delete.
3. Choose **Delete** from the **Renditions** menu. The Rendition Information page opens without the deleted rendition.

   Renditions and other items are not available if they have been removed from Oracle Content Server. When you delete a rendition from the system, it disappears from the basket display.

10.2.10.5 Downloading Multiple Items

You can compress renditions and other content items into a single file and downloaded to a local or networked drive, for example, when you want to send multiple renditions or native files to others. You can do this from the Digital Asset Basket page or Rendition Information page.

To download multiple renditions:

1. Access the digital asset basket or Rendition Information page.
2. Select the check box next to the renditions you want to download. The renditions are listed in the Selected Renditions column of the Digital Asset Basket page, or the Rendition Name column of the Renditions Information page.
3. Choose **Download** from the **Renditions** menu on the Rendition Information page or from the **Items** menu on the Digital Asset Basket page.
4. Follow the download instructions as they are displayed on screen.

Notes:

- To download all renditions in your digital asset basket, or on the Rendition Information page, select all items, and then choose the **Download** menu option. You do not have to select the check box next to any rendition if using this option.
- Web-viewable files of video renditions added to the digital asset basket are suitable for viewing only from the digital asset basket. You cannot download them from the digital asset basket. To download a rendition, use the Rendition Information page.
- You can remove renditions and other items from Oracle Content Server using the Rendition or Content Information pages.

10.2.10.6 Creating Renditions

Renditions are created automatically when a digital asset is checked in. The types of renditions created are determined by criteria defined in the selected rendition set.

To create renditions:

1. Access the Content Check In form.
2. Choose a rendition set from the Rendition Set list.
3. Enter a title and any additional metadata for the asset. The title you enter must be 249 or fewer characters in length.
4. Click **Browse** to locate the primary file.
5. Click **Check In**. The Check In Confirmation page opens.

Notes

- Oracle Content Server uses the file extension, such as .psd, .jpg, .mov, or .avi, to determine if an item is a digital asset. You must append the correct extension to the file name for all digital assets checked in to Oracle Content Server. For example, a Photoshop file named CorporateLogo.psd is correctly identified by Oracle Content Server as a digital asset, but one named CorporateLogo is not.
- Do not select an alternate file when checking in a digital asset. Doing so prevents the primary file from rendering.

10.2.10.7 Updating Renditions

If an incorrect rendition set was selected when a digital asset was checked in, or if a new rendition set has been created, you may want to update the renditions created for a digital asset.

To update to a different rendition set, perform these steps:

1. Choose **Update** from the **Content Actions** menu on the Content Information page.
2. Choose a different rendition set from the Rendition Set list.
3. Click **Submit Update**. The Content Information page opens.

Notes

- You cannot display rendition information while an asset is being processed by Oracle Content Server and Digital Asset Manager. If an asset is being processed, the status in the revision history on the Content Information page is GenWWW, and the Rendition Information page displays a message saying the content item is not released yet.

- Updating a rendition set replaces the previous renditions with a new set, effectively removing the previous set from Oracle Content Server.

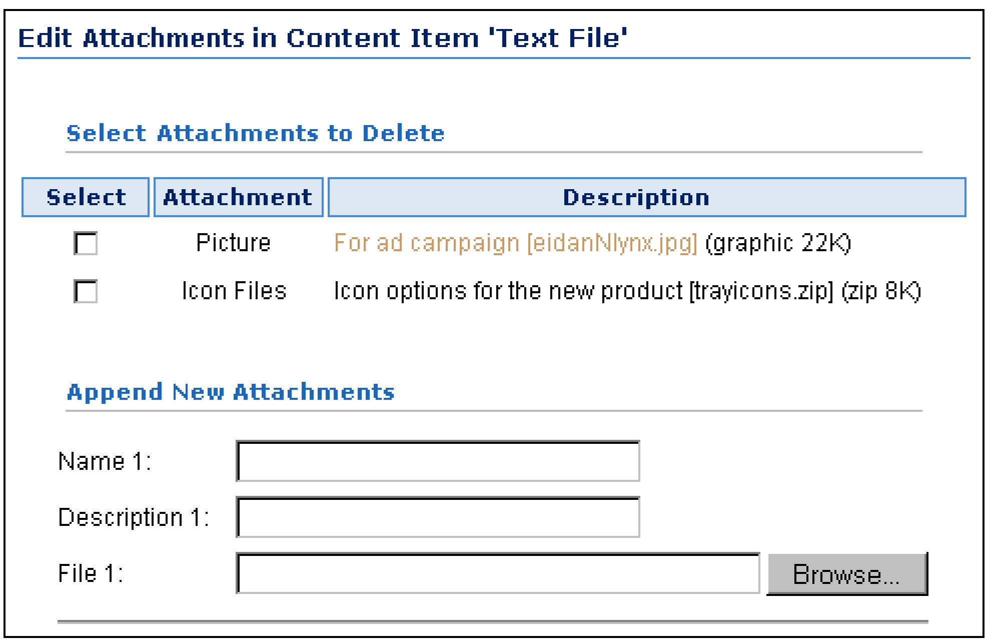
10.2.11 Working with Standard Content Items

Digital Asset Manager adds functionality to Oracle Content Server that extends to content items that are not digital assets. You can add native and Web-viewable versions of content items to your digital asset basket, and add or delete attachments to content items from the Content Information page.

Add/Edit Attachments

In some situations, you may want to associate an additional rendition or other file to a content item that is not a digital asset, or remove an attachment that is no longer useful. For example, you may attach a customer's new logo to a piece of collateral that uses it and remove the old one, or you may attach a text file with project contact information to a project plan. You can add files such as these to a content item using the Add/Edit Attachments page, accessed from the **Content Actions** menu on the Content Information page. Attached files are not converted to a Web-viewable format, and are not indexed for searching by Oracle Content Server.

Figure 10–12 Adding or Editing an attachment with the Edit Attachments page



Page Item	Description
Attachment column	Lists the name given to an existing attached file at the time it was attached.
Description column	Lists the description given to an existing attached file at the time it was attached.
Name field	Used to enter the name of the file to be attached. Displayed in the Attachments section of the Content Information page.

Page Item	Description
Description field	Used to enter the description of the file to be attached. Displayed in the Attachments section of the Content Information page.
File field	Used to locate the file to be attached.
Add/Edit Attachment Button	Submits the information to Oracle Content Server.

To add an attachment to a content item:

1. Access the Content Information page.
2. Choose **Add/Edit Attachments** from the **Content Actions** menu. The Add/Edit Attachments page opens.
3. Enter a name for the attachment in the Name field (required). The name is displayed in the Attachments section of the Content Information page.
4. Enter a description for the rendition in the Description field (optional). The description is displayed in the Attachments section of the Content Information page.
5. Click **Browse** to locate the rendition or other file you want to attach to the content item (required). It can be any type of file.
6. Click **Add/Edit Attachments**. The Content Information page opens, showing the attached file in the Attachments section.

   Metadata on the Add/Edit Attachments page is for information only. It does not get indexed for searching.

To delete an attachment from a content item:

1. Access the Content Information page.
2. Choose **Add/Edit Attachments** from the **Content Actions** menu. The Add/Edit Attachments page opens.
3. Select the check box next to the attachment you want to delete. You can select multiple attachments to delete.
4. Click **Edit Attachments**. The Content Information page opens without the attachment.

10.2.12 Digital Asset Manager on a Macintosh Client

Digital Asset Manager renders digital assets when checked in using a Macintosh client provided the filename of the asset has a valid file extension. However, files created on Macintosh operating systems before OS X may have information stored in a file resource fork. Information in a resource fork may include custom fonts used by the file and is not transferred.

Depending on your organization's requirements, removing the resource fork generally does not create a problem. One exception to this is if the asset uses custom fonts and the rendition set includes a PDF rendition.

10.3 FlipFactory Supported Formats

Digital Asset Manager currently supports use of Telestream's FlipFactory for video conversion. Visit the Telestream site or consult the FlipFactory help system for additional documentation on FlipFactory (www.telestream.net).

Formats supported by the video conversion application must also be associated with Oracle Content Server by the system administrator using the Oracle Content Server Configuration Manager. If a supported format does not render, see your system administrator.

FlipFactory supports the following formats:

- Section 10.3.1, "Streaming Media Formats"
- Section 10.3.2, "Broadcast Media Formats"
- Section 10.3.3, "Professional Media Formats"

10.3.1 Streaming Media Formats

Format	Description
3GP Media Format	.3gp
Flash Media Format	.flv
MPEG Layer 3 Elementary Stream Media Format	MPEG Layer 3 is compliant with the MPEG-3 global standard; it interoperates with MPEG-3 compliant hardware and software from other companies.
MPEG Layer 4 Elementary Stream Media Format	MPEG Layer 4 is compliant with the MPEG-4 global standard; it interoperates with MPEG-4 compliant hardware and software from other companies.
PacketVideo MPEG4 Format	PacketVideo MPEG-4 is compliant with the MPEG-4 global standard; it interoperates with MPEG-4 compliant hardware and software from other companies. PacketVideo MPEG-4 is compliant with the following standards: MPEG-4 (ISO/IEC), H.263 baseline (ITU), 3G-324M (3GPP), RTSP/RTP/RTCP (IETF).
QuickTime Media Format	FlipFactory uses the Basic Sorenson codec by default. If the Sorenson codec is to be used for professional work, Telestream recommends that you replace the Basic Sorenson codec with the Sorenson Professional codec. You can obtain the Professional codec directly from Sorenson at www.sorenson.com.
QuickTime Streaming Format	FlipFactory uses the Basic Sorenson codec by default. If the Sorenson codec is to be used for professional work, Telestream recommends that you replace the basic codec with the Sorenson Professional codec. You can obtain the Professional codec directly from Sorenson at www.sorenson.com.
VideoClipStream Media Format	.asf
WAVE Audio Media Format	.wav
Windows Media Format	.wmf

10.3.2 Broadcast Media Formats

Format	Description
Abekas 6000 Format	Connection to an Abekas 6000 server is through its network ports: 10/100 Ethernet, Gigabit Ethernet, or Fibre Channel. Contact Accom or Telestream technical support for details.
Grass Valley Group Profile GXF Media Format	Connection to Grass Valley Group server's real-time system must be made through a 10/100 Ethernet card (XP) or Fibre Channel (PDR and XP). Contact the Grass Valley Group or Telestream technical support for details. Profile Direct Convert Codec Profile Direct Convert video codec converts any MPEG2 video directly into Grass Valley Profile format. This does not require decoding to baseband and then re-encoding to the new format. The media file is deconstructed from one format and reconstructed into the Profile format. Generally, this is done many times faster than real time. The video profile, GOP structure and bit rate are retained. For example, If the input file is standard MPEG2 50Mbps, I-frame only, then the resulting converted file is GVG GXF 50Mpbs I-frame only.
Leitch Media Format	
MXF Media Format	.mxf
Omneon Media Format	.omf
SeaChange Media Format	
Sony MAV70 Media Format	
Vortex Media Format	

10.3.3 Professional Media Formats

Format	Description
AVI Media Format	
Avid OMF Media Format	
Avid TransferManager DV Media Format	
ClipMail MPEG Format	
DV Stream Media Format	
DVD Stream Media Format	
IPV SpectreView Media Format	
MPEG1 System Stream Media Format	
MPEG2 Program Stream Media Format	
MPEG2 Transport Stream Format	

Format	Description
MPEG4 Media Format	
MXF Stream Format	
Pinnacle Liquid Media Format	
Pinnacle MediaStream Media Format	
VOD Transport Stream Media Format	

10.4 Included Image Rendition Sets

Digital Asset Manager installs three predefined rendition sets for rendering image assets. By default, these rendition sets are configured for use with Oracle Outside In Technology (ImageExport).

If your system administrator has modified the default image rendition sets or set up Digital Asset Manager to use a different conversion application, then the rendition sets listed here might not be applicable. For more information about the conversion application used and any custom rendition set, check with your system administrator.

The predefined rendition sets follow:

- Section 10.4.1, "BasicRenditions"
- Section 10.4.2, "ThumbnailOnly"
- Section 10.4.3, "MultipleFormats"

Digital Asset Manager requires the `BasicRenditions` rendition set. Your system administrator can add or delete other rendition sets, depending on your company's requirements.

10.4.1 BasicRenditions

Rendition Name	Rendition Description
Web	A 72 dpi JPEG no bigger than 800x600 pixels (primary Web-viewable image)
Thumbnail	A 72 dpi PNG exactly 80 pixels high (displayed in the Classic and Thumbnail search results views)
Preview	A 72 dpi GIF exactly 250 pixels wide (displayed on Rendition Information page)

10.4.2 ThumbnailOnly

Rendition Name	Rendition Description
Thumbnail	A 72 dpi PNG exactly 80 pixels high

10.4.3 MultipleFormats

Rendition Name	Rendition Description
Web	A 72 dpi JPEG no bigger than 800x600 pixels
Thumbnail	A 72 dpi PNG exactly 80 pixels high
Preview	A 72 dpi GIF exactly 250 pixels wide
Jpeg2000	A 72 dpi JPEG 2000 no bigger than 800x600 wide
Tiff	A TIFF
Bitmap	A Bitmap

10.5 Oracle Outside In Technology Image Formats

Digital Asset Manager can be configured to work with many different conversion applications. By default, Digital Asset Manager provides predefined image asset rendition sets for use with Oracle Outside In Technology. To determine which conversion application your organization uses, check with your system administrator. If it is Oracle Outside In Technology, the following output formats are available to you.

Formats supported by the graphic conversion application must also be associated with Content Server by the system administrator, using the Configuration Manager. If a supported format does not render, see your system administrator.

For more information about Oracle Outside In Technology, see its Documentation Library at:

http://download.oracle.com/docs/cd/E14154_01/index.htm

Format	Version
Raster Image	
CALS Raster (GP4)	Type I
CALS Raster (GP4)	Type II
Computer Graphics Metafile	ANSI
Computer Graphics Metafile	CALS
Computer Graphics Metafile	NIST
Encapsulated PostScript (EPS)	TIFF header only
GEM Image (Bitmap)	
Graphics Interchange Format (GIF)	
IBM Graphics Data Format (GDF)	1.0
IBM Picture Interchange Format	1.0
JBIG2	Graphic Embeddings in PDF
JFIF (JPEG not in TIFF format)	
JPEG	
JPEG 2000	JP2

Format	Version
Kodak Flash Pix	
Kodak Photo CD	1.0
Lotus PIC	
Lotus Snapshot	
Macintosh PICT	BMP only
Macintosh PICT2	BMP only
MacPaint	
Microsoft Windows Bitmap	
Microsoft Windows Cursor	
Microsoft Windows Icon	
OS/2 Bitmap	
OS/2 Warp Bitmap	
Paint Shop Pro (Win32 only)	5.0, 6.0
PC Paintbrush (PCX)	
PC Paintbrush DCX (multi-page PCX)	
Portable Bitmap (PBM)	
Portable Graymap PGM	
Portable Network Graphics (PNG)	
Portable Pixmap (PPM)	
Progressive JPEG	
StarOffice Draw	6.x – 8.0
Sun Raster	
TIFF	Group 5 & 6
TIFF CCITT	Group 3 & 4
TruVision TGA (Targa)	2.0
WBMP wireless graphics format	
Word Perfect Graphics	1.0
X-Windows Bitmap	x10 compatible
x10 compatible	x10 compatible
X-Windows Pixmap	x10 compatible
WordPerfect Graphics	1.0 - 10.0
Vector Image	
Adobe Illustrator	4.0 - 7.0, 9.0
Adobe Illustrator (XMP only)	11 – 13 (CS 1 – 3))
Adobe InDesign (XMP only)	3.0 – 5.0 (CS 1 - 3)
Adobe InDesign Interchange (XMP only)	
Adobe Photoshop (XMP only)	8.0 – 10.0 (CS 1 – 3)
Adobe PDF	1.0 – 1.7 (Acrobat 1 - 9)

Format	Version
Adobe Photoshop	4.0
Ami Draw	SDW
AutoCAD Drawing	2.5, 2.6
AutoCAD Drawing	9.0 – 14.0
AutoCAD Drawing	2000i - 2007
AutoShade Rendering	2
Corel Draw	2.0 – 9.0
Corel Draw Clipart	5.0, 7.0
Enhanced Metafile (EMF)	
Escher graphics	
FrameMaker Graphics (FMV)	3.0 – 5.0
Gem File (Vector)	
Harvard Graphics Chart DOS	2.0 – 3.0
Harvard Graphics for Windows	
HP Graphics Language	2.0
IGES Drawing	5.1 – 5.3
Micrografx Designer	through 3.1
Micrografx Designer	6.0
Micrografx Draw	through 4.0
Microsoft XPS (Text only)	
Novell PerfectWorks Draw	2
OpenOffice Draw	1.1 – 3.0
Visio (Page Preview mode WMF/EMF)	4.0
Visio	5.0 - 2007
Visio XML VSX (File ID only)	2007
Windows Metafile	

A

User Interface

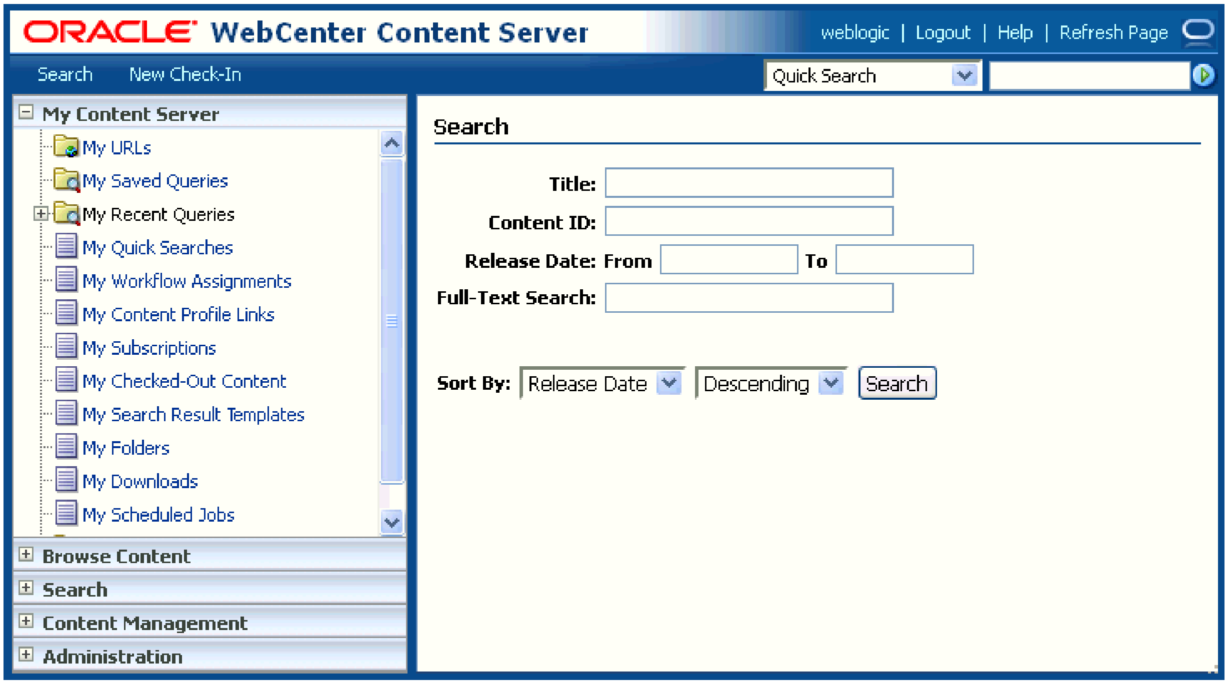
This appendix describes the user interface for Oracle WebCenter Content Server including window and menu elements and options.

A.1 Getting Started

This section covers the following topics:

A.1.1 Home Page

The home page opens when you first log in. The home page typically includes the tray navigation, the top toolbar, and other page content and functions as determined by your system administrator. To return to the home page at any time, click the **Content Server** link in the upper left.



If you set up a default saved query, the results are displayed on this page (you may have to scroll down to view them).

A.1.2 Toolbar

The toolbar at the top of Content Server Web pages contains navigation links, online help, and the Quick Search feature.

Note: The Search and New Check-In links may list multiple options if your system administrator creates and enables Content Profiles to provide alternative metadata forms.

Link	Description
Content Server	Displays the Home Page.
Search	Displays the Advanced Search Page, which you can use to perform metadata and full-text searches to find specific files.
New Check In	Displays the Content Check-In Form, which you can use to check new files into Content Server.
User profile link	Displays the User Profile Page and provides information for editing your user profile. The link is either a user name or the user's full name.
Logout	Logs out of Content Server. This option is available only if the optional ExtranetLook component is installed.
Help	Displays the online help system.

Link	Description
Refresh Page	Updates the current page.
Quick Search	Searches for the specified term in the supported metadata fields and in the content item text if supported by your system. For more information, see Section A.2.1, "Quick Search Field."

A.1.3 Trays

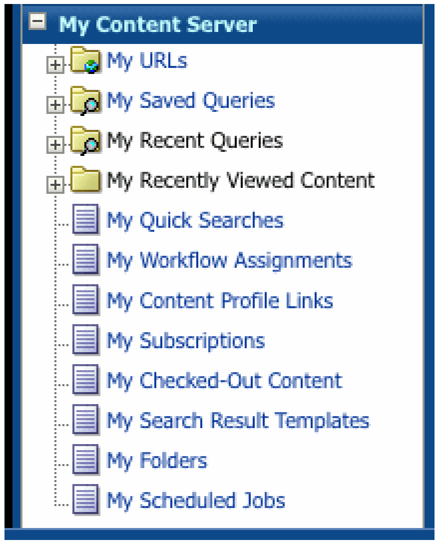
The trays on the left side of Content Server Web pages provide quick access to most of the functional areas in Content Server. You can add functions you use often, such as predefined searches and links to your favorite Web sites.

Note: Trays are part of the frame-based Trays layout option, and are the default navigation tool for Content Server. If you select Top Menus on the User Profile Page, then you can access Content Server functionality from a series of menus located above the main content area.

Link	Description
Microsoft Login	If you are logged in to your Microsoft network, click this link to log in to Content Server. This link is present only if your organization is using Microsoft Network security to log in to Content Server. Many browsers, such as Mozilla Firefox, support logging in with this security. Your Content Server instance may be integrated with your enterprise login system. For more information, ask your system administrator.
My Content Server	Displays the My Content Server Tray with options to view URLs and queries you have saved, content you have checked out, open workflow assignments, available metadata profiles, personal folders, and so on.
Browse Content	Expands to display a hierarchy of folders. You can expand and collapse the levels of folders in the tray and click on a folder to show the content of the folder in the work area. For more information, see Section A.10, "Folders Interface."
Search	Displays the Search Tray. From this page, you can perform metadata and full-text searches to find specific files.
Content Management	Displays the Content Management Tray with options to view content items that are checked out or expired, or that are active in workflow.

A.1.4 My Content Server Tray

You can use the My Content Server tray to display URLs and queries you have saved, content you have checked out, open workflow assignments, available metadata profiles, personal folders, and so on. To open this tray, click **My Content Server** in the trays area.

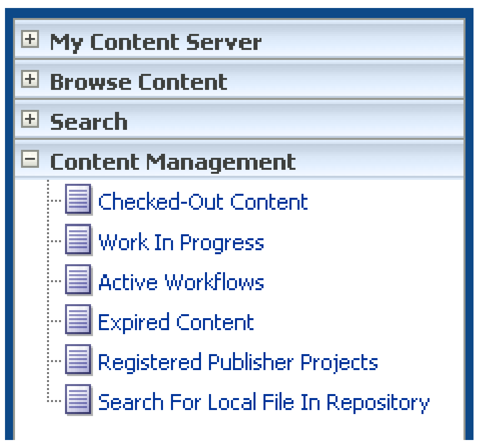


Link	Description
My URLs	Expand **My URLs** to display previously saved URLs. Click a URL to open the target address in the work area. Click **My URLs** to specify and save links you want to make readily available: **Title**: The displayed name of the link. **URL**: The complete Uniform Resource Locator (URL) of the Web site; for example: `http://www.oracle.com`.
My Saved Queries	Opens the Saved Queries Page page to modify or delete previously saved queries. Expand **My Saved Queries** to display previously saved queries. Click a query to execute the associated search. To save a query, choose **Save Search** from the **Actions** menu on the Search Results Page.
My Recent Queries	Expand **My Recent Queries** to display the text form of the queries you performed recently. Click a query to execute the associated search. Click **Clear** to remove all queries from the list.
My Recently Viewed Content	Expand **My Recently Viewed Content** to display the most recent Content Information Pages you have viewed. Click a list item to open Content Information Page for that item.
My Quick Searches	Displays the Quick Searches Page which lists both the quick searches your administrator creates and the quick searches you explicitly create with the **Create New** option on this page.
My Workflow Assignments	Displays the Workflow in Queue Page which lists of all content items currently in a workflow for which you have responsibility.
My Content Profile Links	Displays a list of your defined content profiles. Click a link to display the profile.
My Subscriptions	Displays the Subscriptions Page which lists of all content items to which you subscribe.
My Checked-Out Content	Displays the Checked-Out Content for User Page which lists of all content you have checked out.

Link	Description
My Search Result Templates	Displays the Search Result Templates for User Page, from which you can build custom search results views.
My Folders	Displays a list of personal folders. Expand or collapse a particular level in the folder hierarchy to view folders contained within that folder. Click a folder name to display the contents of the folder in the work area. For more information about folders, see Section A.10, "Folders Interface."
My Downloads	Displays a list of recent content items that you have downloaded from Content Server.
My Scheduled Jobs	Displays a list of jobs requiring your attention.

A.1.5 Content Management Tray

You can use the Content Management tray to manage content in Content Server. You must be a Contributor to access this tray. To open this tray, click **Content Management** in the trays area.



Link	Description
Checked Out Content	Opens the Checked-Out Content for User Page that lists all files currently checked out of Content Server.
Work In Progress	Opens the Work In Progress Page that lists files that have been checked in, but not released.
Active Workflows	Opens the Active Workflows Page that lists the currently active workflows.
Expired Content	Opens the Expired Content Page that lists files that have expired or that are set to expire soon.
Search For Local File In Repository	Opens the Search for Local File Page that lets you select and compare a file from a local file system against all electronically signed content to which you have access. You can validate an external file against a single content item from the Content Information - Signatures Tab.

A.2 Search Pages

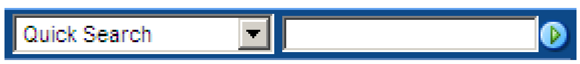
This section describes the pages and options for performing Content Server searches.

This section covers the following topics:

- Section A.2.1, "Quick Search Field"
- Section A.2.2, "Quick Searches Page"
- Section A.2.3, "Create/Edit Targeted Quick Search Page"
- Section A.2.4, "Home Page Search Fields"
- Section A.2.5, "Search Tray"
- Section A.2.6, "Advanced Search Page"
- Section A.2.7, "Search Results Page"
- Section A.2.8, "Saved Queries Page"
- Section A.2.9, "Expired Content Page"

A.2.1 Quick Search Field

You can use the Quick Search field to perform a search at any time. By default, the Quick Search field searches for the specified search terms in the title, content ID metadata, and text indexed for full-text search if your system supports it. You can also create custom search queries that incorporate the specified search terms. For more information, see Section A.2.2, "Quick Searches Page."



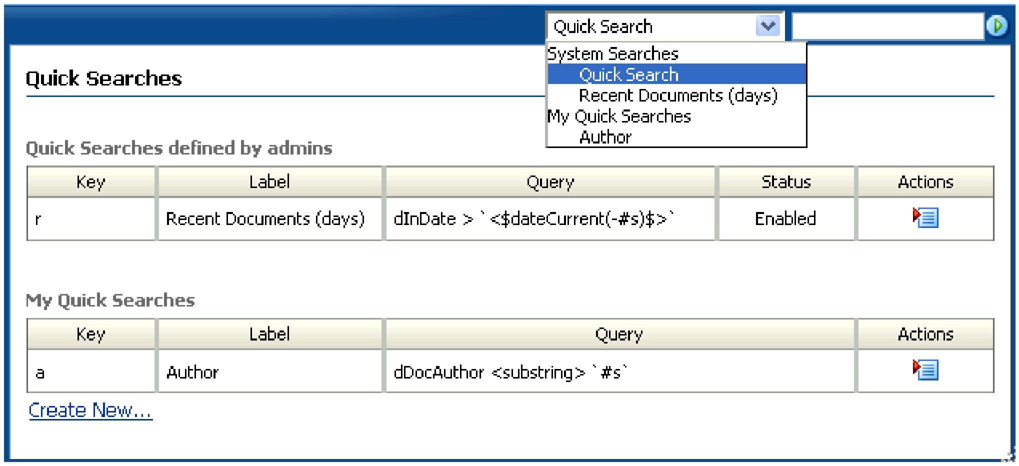
Note: If you have changed your layout to the Classic layout, you can select **Quick Search** on your Adding Links to Favorites page to enable the Quick Search field.

Item	Description
Quick Search	Displays available search queries. The default query (labeled Quick Search) searches for the specified search terms in the title, content ID metadata, and text indexed for full-text search if your system supports it. The name of the selected query persists until you select another query. The list can contain queries created by your administrator (listed under System Searches), and queries that you create (listed under My Quick Searches) with the Quick Searches Page.
Text entry field	Enter search terms for use with the selected query.
Search icon	Initiates the search and displays a Search Results Page for specified query and search terms.

A.2.2 Quick Searches Page

You can use the Quick Searches page to create and manage predefined search queries listed in the Quick Search menu. An administrator can create queries that are available for all users. A user can enable or disable these queries and create queries that are available only for their own use.

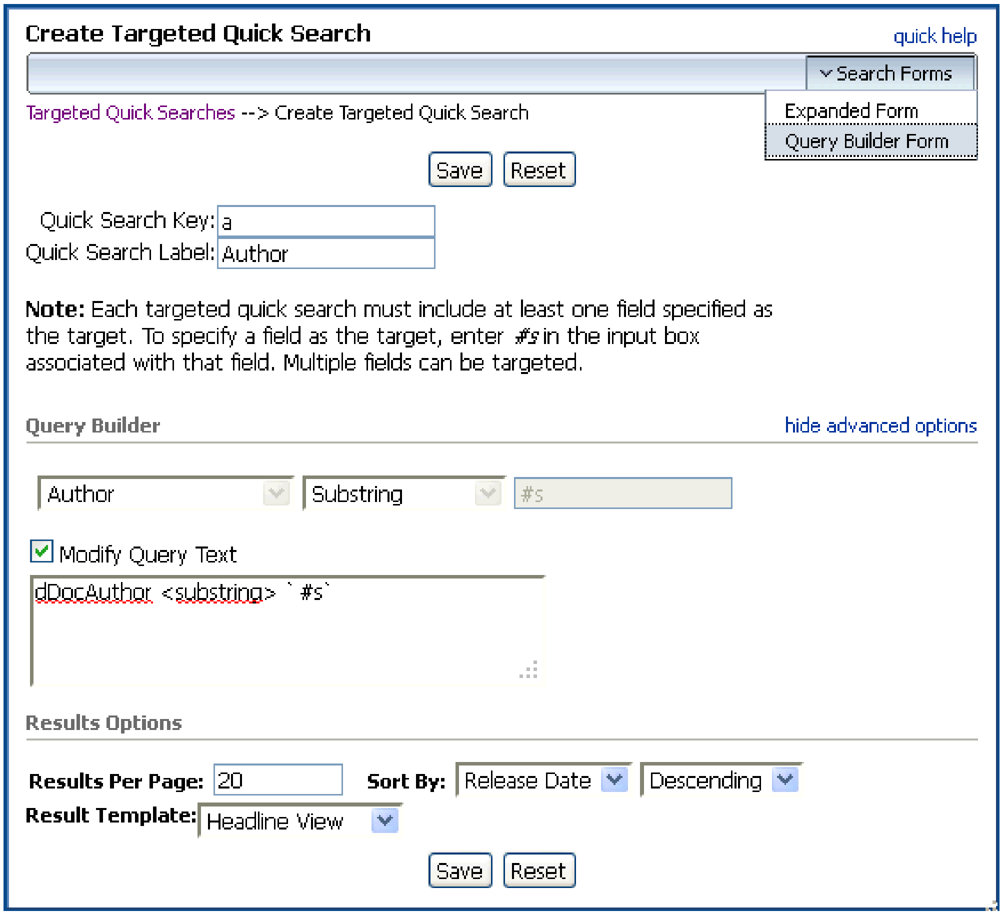
To access the Quick Searches page, click **My Quick Searches** in the My Content Server tray.



Element	Description
Quick Searches defined by admins	These are queries defined by an administrator and are listed under System Searches in the Quick Search list. These searches are available for all users. Use the options in the associated Actions menu to enable or disable the search. Disabled searches are not displayed in the Quick Search list.
My Quick Searches	These are queries you create. They are listed under My Quick Searches in the Quick Search list. Searches you create are always listed in the Quick Search list (you can delete, but not disable them.)
Key	Displays the keyboard shortcut to select the search from the Quick Search list. Searches are listed in ascending order based on the Key in both the table and in the Quick Search list.
Label	Displays the name shown in the Quick Search list.
Query	Displays the text of the query.
Actions list	Provides the following actions: **Edit:** Opens the Create/Edit Targeted Quick Search Page to modify the search query itself or other query parameters. **Delete:** Immediately removes the associated Quick Search from the table.
Create New	Opens the Create/Edit Targeted Quick Search Page to create a new quick search.

A.2.3 Create/Edit Targeted Quick Search Page

You can use the Create/Edit Targeted Quick Search page to create or edit custom search queries that are then listed in the My Quick Searches tray and in the Quick Search menu. The Create/Edit Targeted Quick Search page is a modified form of the Advanced Search Page that includes additional display-related options.

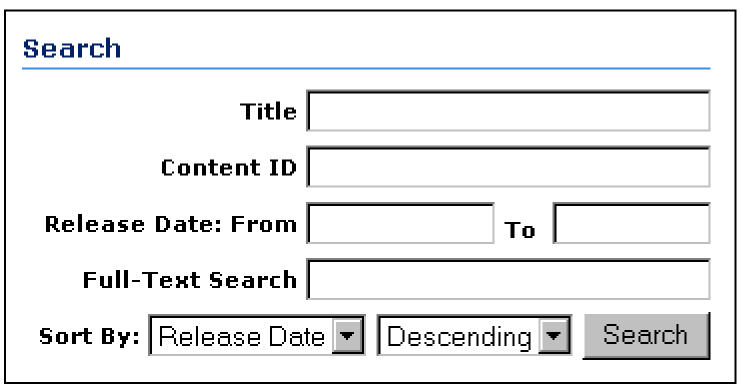


Element	Description
Search Forms	Select the form to use to create the search query. The Expanded Form is selected by default. For more information about these forms, see Section A.2.6, "Advanced Search Page." The form you select when you create the quick search is the form you must use when you edit the quick search (this menu is not available when you edit an existing quick search.) **Note:** If you want to manually edit the query text, use the Query Builder form.
Quick Search Key	Specify a keyboard shortcut to select the search from the Quick Search list. Searches are listed in ascending order based on this Key on the Quick Searches Page and in the Quick Search list. Use lower case letters or numbers. Duplicate keys within the My Quick Searches table are not allowed. Although it is best to use a single character, you can use multiple character keys to avoid duplicate key names. Only the first character acts as the shortcut. For Example, if you have keys a1, a2, and a3, the first time you press **a**, you select the search associated with key a1. The next time you press **a**, you select the search associated with key a2, and so on.
Quick Search Label	Specify the name to display in the Quick Search list.

Element	Description
Metadata Search/ Query Builder	Specify search criteria in one of the forms you choose from the the Search Forms menu. Enter **#s** in one or more fields to represent the search terms entered by the user in the Quick Search field. To further restrict the search, you can provide specific values for one or more search fields, but you must include **#s** in at least one field. If you use the Query Builder form, you can manually edit the query when you click **show advanced query builder options** and then select **Modify Query Text**. For more information about these forms, see Section A.2.6, "Advanced Search Page."
Results Options	For information about standard Results Options provide with search forms, see Section A.2.6.3, "Results Options." The Create/Edit Targeted Quick Search window adds the following Results Option: **Result Template**: To specify the format for the results of the quick search, select a template from the list of available templates. When you run the associated quick search, the template you select becomes the new default search results template until you explicitly change it with another quick search, a saved search, or on the search results page.

A.2.4 Home Page Search Fields

You can use the home page search fields to perform a metadata search, full-text search, or a combination of both from the Content Server Home Page.



The home page shows only the most commonly used search fields.

Element	Description
Title	A descriptive name for the content item.
Content ID	The unique identifier for the content item.
Release Date	The date that the item was released to Content Server. **From:** The search finds items released on or after this date. **To:** The search finds items released before (but not on) this date.

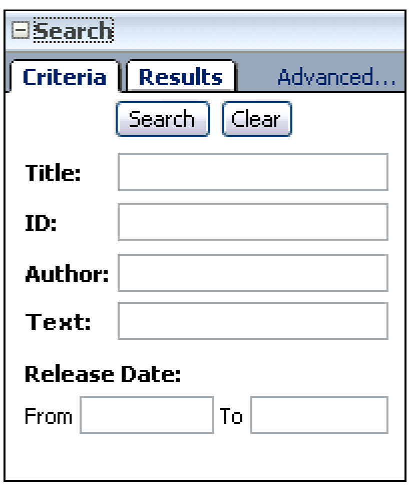
Element	Description
Full-Text Search	Enter full-text search terms. If your system administrator has configured Content Server to search database metadata only, the Full-Text Search field is not displayed.
Sort By	Specifies the field that the search results sort on: **Release Date (default):** Sorts by the Release Date metadata field. **Title:** Sorts alphabetically by the Title metadata field.
Order	Specifies the sort order of the search results: **Descending (default):** Sorts alphabetical results in Z through A order; numeric results in 9 through 0 order; and date results in newest to oldest order. **Ascending:** Sorts alphabetical results in A through Z order; numeric results in 0 through 9 order; and date results in oldest to newest order.
Search	Displays a list of the content items that match the search criteria on a Search Results Page.

A.2.5 Search Tray

You can use the Search tray to perform metadata, full-text, or combination search. Click the **Search** tray in the trays area to expand or collapse the tray.

A.2.5.1 Criteria Tab

You can use the **Criteria** tab on the Search Tray to enter your search criteria.

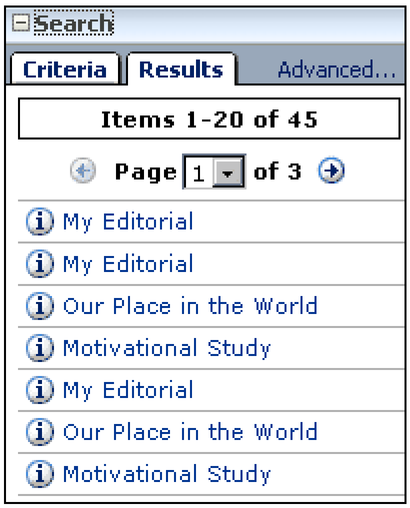


Element	Description
Advanced	Displays the Advanced Search Page.
Search	Submits the search criteria entered to Content Server.
Clear	Clears any criteria entered into the search fields.
Title	A descriptive name for the content item.
ID	The unique identifier for the content item.
Author	The author of the content item.

Element	Description
Text	Enter text search terms. If your system administrator has configured Content Server to search database metadata only, the Text field is not displayed.
Release Date	The date that the item was released to Content Server. **From:** The search finds items released on or after this date. **To:** The search finds items released before (but not on) this date.

A.2.5.2 Results Tab

You can use the **Results** tab in the Search Tray to view search results based on the criteria you entered on the **Criteria** tab.



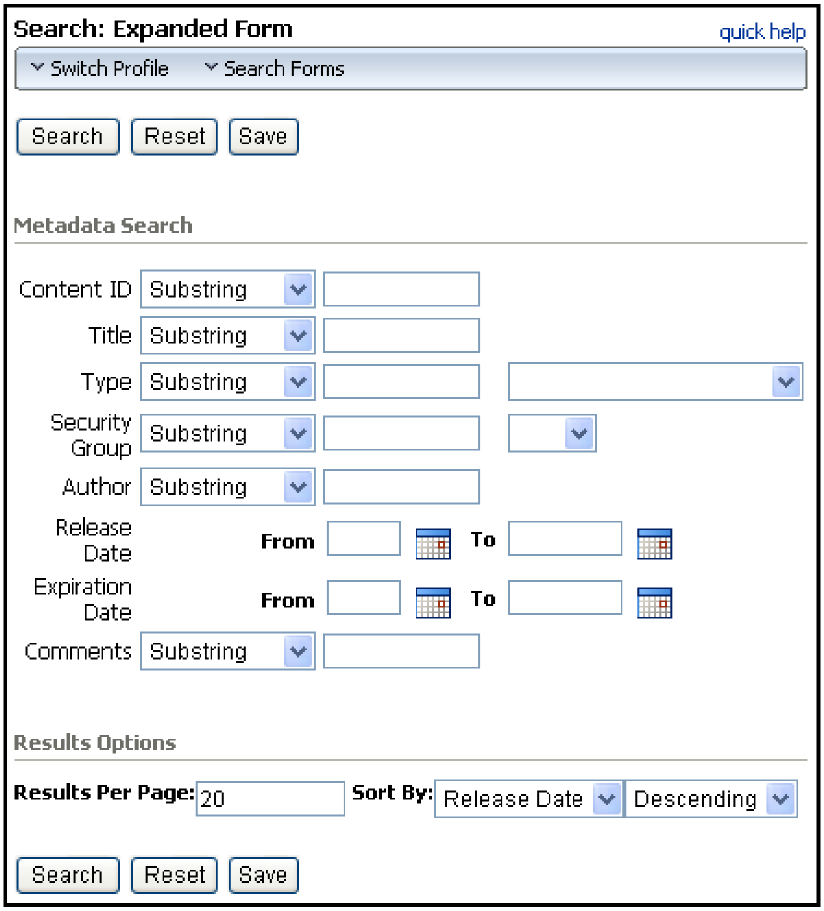
The search results remain on the **Results** tab until you perform a new search or refresh the page.

Element	Description
Advanced	Displays the Advanced Search Page.
Previous icon	Returns to the previous search results page in a series.
Next icon	Advances to the next search results page in a series.
Page	Select a specific page in a series to go directly to that page.
Info icon	Displays the content information of the corresponding content item.

A.2.6 Advanced Search Page

You can use the advanced search page to build a search using either the Expanded Form to view all criteria options, or the Query Builder Form to select search criteria from menus as required. With the Query Builder Form, you can also manually edit the query text.

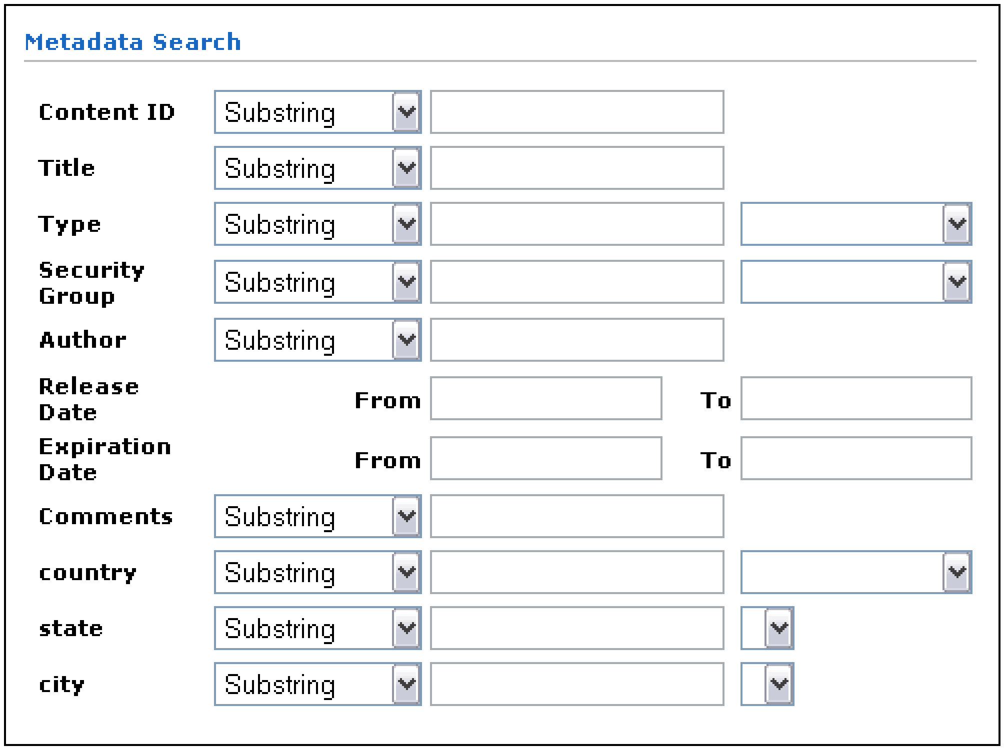
Note: When using Oracle Text Search with your Content Server instance, you cannot enter complex search queries into the Full-Text Search field on the Expanded Form. Instead, you must use the advanced options on the Query Builder Form.



To access this page, click **Advanced** in the Search Tray or **Search** on the toolbar.

A.2.6.1 Expanded Form

You can use the expanded form on the Advanced Search Page to display all search fields available to you on a single page. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."



You can alternate between the expanded form and the Advanced Search Page using the **Actions** menu at the top of the search page.

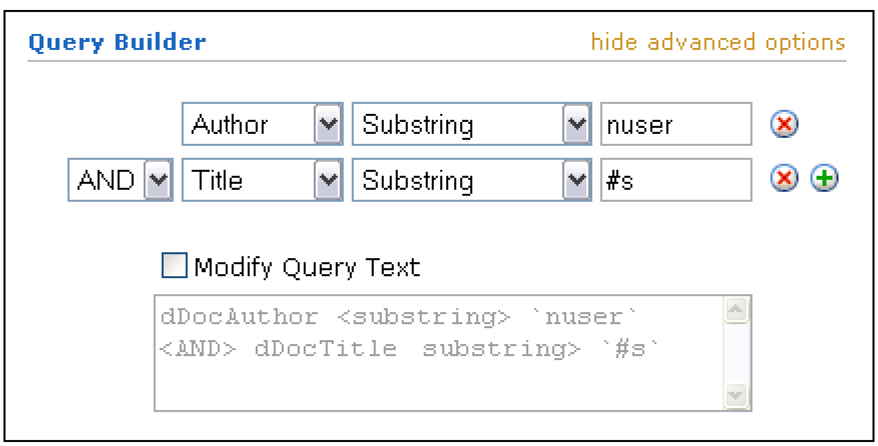
Element	Description
Search	Displays a list of the content items that match the search criteria on a Search Results Page. A blank search (no criteria) displays all content items.
Reset	Clears the search fields, but does not reset the results options settings.
Save	Saves the search as a saved query link in the My Saved Queries tray. You are prompted to enter a title for the link.
Full-Text Search	Enables you to search for words within content items. Also evaluates IdocScript. If your system administrator has configured Content Server to search database metadata only, the Full-Text Search field is not displayed.
Content ID	The unique identifier for the content item.
Title	A descriptive name for the content item.
Type	The category of the document. You can enter text or select from the list of predefined values.
Security Group	An identifier that specifies access permission to the content item. You can enter text or select from the list of predefined values.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Author	The user who checked in the current content item revision.

Element	Description
Release Date	The date that the current revision was released to Content Server. **From:** The search finds content items released on or after this date. **To:** The search finds content items released before (but not on) this date.
Expiration Date	The date that the content item is no longer be available for searching or viewing in Content Server. **From:** The search finds content items that expires on or after this date. **To:** The search finds content items that expires before (but not on) this date.
Comments	Additional notes about the content item.
Results Options	Enables you to specify how search results are displayed.

Note: With the Search Tray and Advanced Search Page, you can specify criteria in both standard and custom fields. If your content server system includes custom metadata fields they typically are displayed below the standard metadata fields.

A.2.6.2 Query Builder Form

You can use the Query Builder form to select options from a series of lists to easily build and save complex queries.



Element	Description
show/hide advanced options	Toggles between displaying and hiding the Modify Query Text check box and Query Text field.
Metadata lists	Enables you to select metadata fields for searching one field at a time.

Element	Description
Add/Delete icons	Control the display and use of metadata lists. **Add:** Displays an additional metadata field below the current field. **Delete:** Hides the selected metadata field and removes any query text entered into the field.
Operators	Provide easy selection of search options. Available search operators are dependent on the type of search engine used.
Modify Query Text	Controls whether you can enter query text directly in the Query Text field. **Enabled:** You can enter query text directly into the Query Text field. **Disabled:** You can see, but not directly edit the Query text.
Query Text field	Displays the query text as it is being built. If you selected the Modify Query Text check box, you can create or modify the query text directly in this field.

A.2.6.3 Results Options

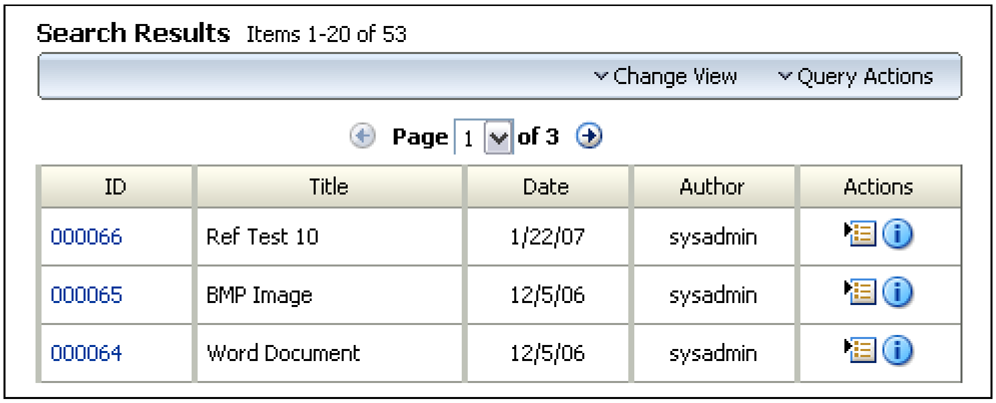
You can use the Results Options area of the Advanced Search Page to control the display of the Search Results page.

Element	Description
Results Per Page	Specifies the maximum number of content items displayed on each search results page. The default is `25`, and the range is from `0` to `100`.
Sort By	Specifies the field that the search results sort on: **Release Date (default):** Sorts by the Release Date metadata field. **Title:** Sorts alphabetically by the Title metadata field. **Score:** Sorts by the number of occurrences of search terms, or the proximity of search terms when a proximity operator such as <NEAR> is used. Applies only to full-text search.
Order	Specifies the sort order of the search results: **Descending (default):** Sorts alphabetical results in Z-A order; numeric results in 9-0 order; and date results in newest to oldest order. **Ascending:** Sorts alphabetical results in A through Z order; numeric results in 0 through 9 order; and date results in oldest to newest order.
Search	Displays a list of the content items that match the search criteria on a Search Results Page. If no search criteria are specified, a list of all content items is displayed.
Reset	Resets the fields on this page to the previously saved settings.

Element	Description
Save	Saves the search as a saved query link in the My Saved Queries tray. You are prompted to enter a title for the link.

A.2.7 Search Results Page

The search results page displays a list of content items that match the criteria specified during a search.



To change how your search results page looks, choose a different default search template on your User Profile Page. You can also select a different view option from the **Actions** list on the search results page.

Element	Description
Previous icon	Returns to the previous search results page in a series.
Next icon	Advances to the next search results page in a series.
Page	Select a specific page in a series to go directly to that page.
Actions menus	**Search Actions:** Enables you to select an action to perform on the search results list. Actions include saving the search to the **My Content Server** tray and searching within the listed results. **Change View:** Enables you to select a different viewing option for the search results list: ■ **Classic:** A thumbnail image and descriptive text is displayed. ■ **Thumbnail:** A thumbnail image is displayed. ■ **Headline:** A single line list of search results with no thumbnail image is displayed. ■ **Custom:** Displays custom search results based on a custom list template created on the Create/Edit Classic View Search Result Template page.
ID	Displays the content ID of a content item. Click the content ID of a selected item to either open a Web-viewable version of the content, save the file to your local drive, or open the document with an associated program.
Title	Displays the title of a content item.
Date	Displays the date that content item was checked in.

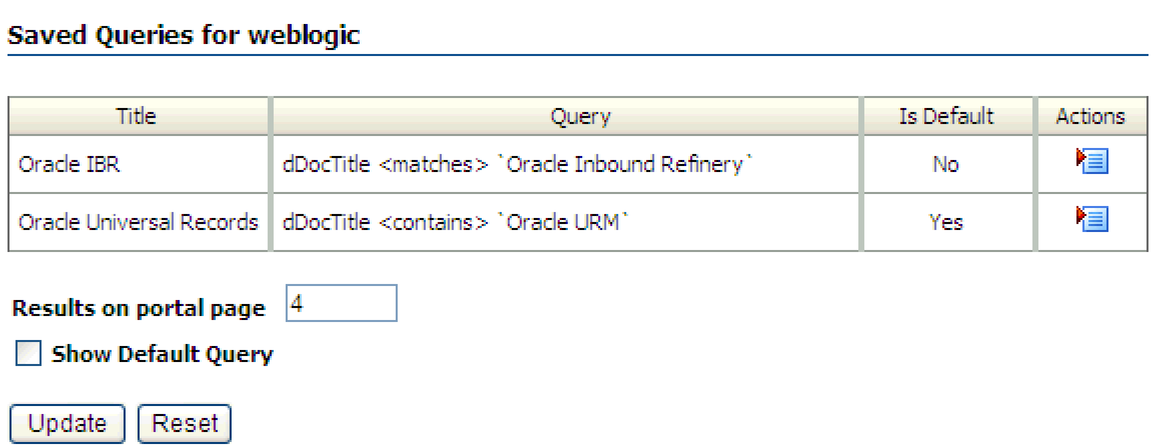
Element	Description
Author	Displays the author of the content item.
Actions	**Actions** menu: ▪ **Content Information**, which displays the Content Information Page for the selected content item ▪ **Check Out**, which checks out the selected content item and displays the Check-Out Confirmation Page ▪ **Check In Similar**, which displays the Content Check-In Form with metadata fields filled in to match the checked in content item ▪ **Send Link by E-mail**, which opens a new e-mail message that contains a URL to the selected content item. **Info** icon: Displays the Content Information Page for the selected content item.
Thumbnail (Thumbnail and Classic views)	Displays a small image of the content item or an icon indicating the content type of the content item. Click the thumbnail of a selected item to display a Web-viewable version of the content, save the file to your local drive, or open the document with an associated program.
Description (Classic view)	Shows the content ID and title of the content item. Click the content ID link to open the Web-viewable file.
Rev. (Classic view)	Shows the latest released revision of the content item. Click the link to open the Revision History.
Info icon (Classic view)	Displays the Content Information Page for the content item.

A.2.8 Saved Queries Page

Use the Saved Queries page to modify or delete previously saved queries. To access this page, click **My Saved Queries** in the My Content Server tray.

To save a search query, select **Save Search** from Search Action menu on the Search Results Page.

Note: For information about how to save a query link in your My Saved Queries tray, see Section 3.4.2, "Saving a Query."

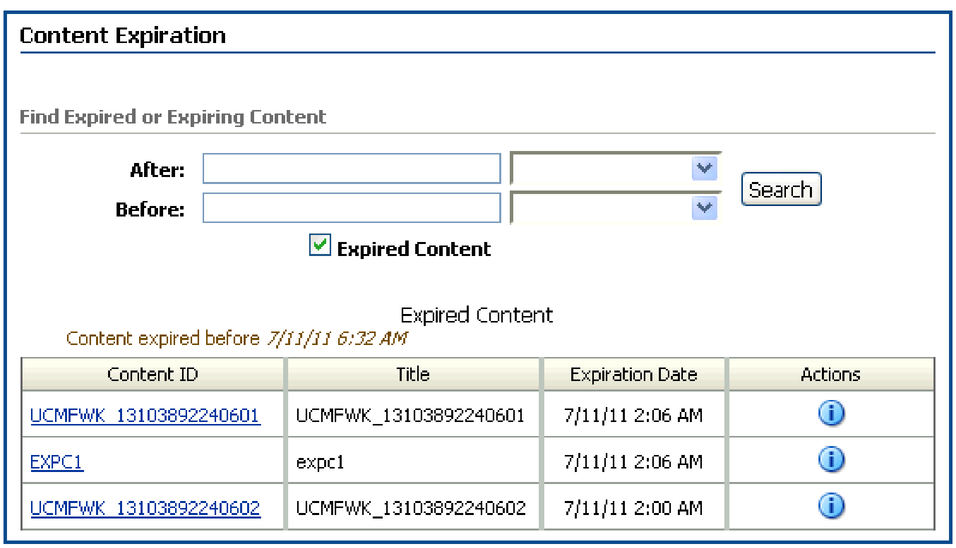


Element	Description
Title	Lists the titles of the queries you have saved.
Query	Lists the queries you have saved.
Is Default	Specifies whether a query is the default query, which is displayed in a different color in the My Saved Queries tray if the **Show Default Query** check box is selected.
Actions	Contains an **Actions** menu you can click to choose an action to take on the query, such as **Set As Default**, **Edit**, or **Delete**.
Results on portal page	Indicates the number of content items for the default query that is displayed on the portal page (home page) if the **Show Default Query** check box is selected.
Show Default Query	Select this check box to display the results of the selected default query on the portal page (home page). The default query link is displayed in a different color in your My Saved Queries tray.
Update	Saves any changes that were made on this page.
Reset	Resets the fields on this page to the previously saved settings.

A.2.9 Expired Content Page

You cannot search for expired content unless you have administrative rights or if your system administrator has granted you specific rights to view and work with expired content.

To display the Expired Content page, click the **Content Management** tray, and click **Expired Content**.



Element	Description
Find Expired or Expiring Content	Specify the criteria to located expired or expiring content. By default, the search returns content set to expire after the current date and time.

Element	Description
After	Specify a date after which to search for expired or expiring content. If you search for content set to expire (the default) and leave this field blank, the current date and time are used. Date list: Select a date and time that is a day, a week, or a month before or after the current date and time. The user locale setting determines the date format. For information about user locale, see Section A.9.3, "User Profile Page."
Before	Specify a date before which to search for expired or expiring content. If you search for expired content and leave this field blank, the current date and time are used. Date list: Select a date and time that is a day, a week, or a month before or after the current date and time.
Search	Search for content that meets the specified criteria.
Expired Content	Select to restrict the search to content that expired within the specified date range. If you deselect this option, the search returns both expired content and content set to expire within the specified date range.
Search Results	The search returns a list of content items that match the specified criteria. The list includes the Content ID, the Title, and expiration date. Click the Content ID link to open the native version of the file. Click the information icon to open the Content Information Page for the associated item.

A.3 Creating and Editing Custom Search Result Templates

To personalize how search results are displayed, select an option from the list on the User Profile Page, or from the Search Results Page. There are three templates available by default, and you have the option to create new views based on the three provided templates. In this way, you can customize the metadata information you want to see on a search result. You can even specify different search results templates to be used for different saved queries.

Note: If you have Oracle WebCenter Content: Records installed with Department of Defense (DoD) functionality enabled, the Security Classification field must always be displayed in a search result. If you do not include the Security Classification field when you customize a search result template, the Security Classification field is included automatically.

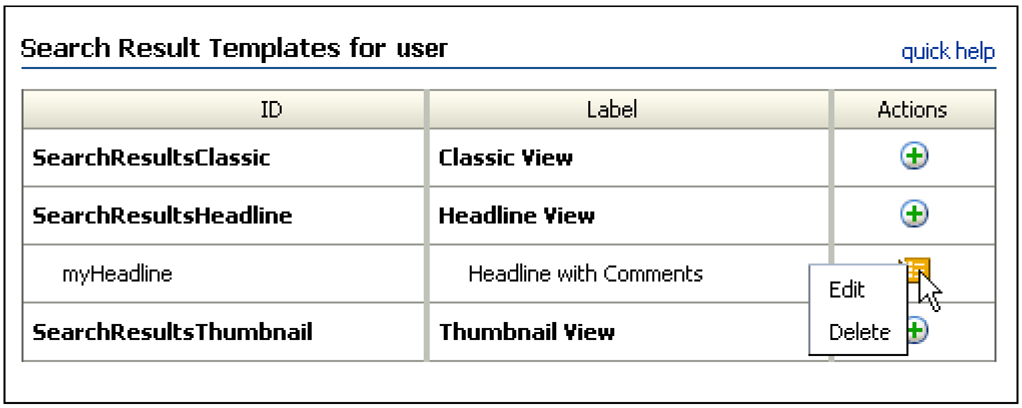
This section covers the following topics:

- Section A.3.1, "Search Result Templates for User Page"
- Section A.3.2, "Create/Edit Classic View Search Result Template Page"
- Section A.3.3, "Classic View Basic Information"
- Section A.3.4, "Classic View Customize Description Column"
- Section A.3.5, "Classic View Advanced Options"
- Section A.3.6, "Create/Edit Headline View Search Result Template Page"

- Section A.3.7, "Headline View Basic Information"
- Section A.3.8, "Headline View Customize Columns"
- Section A.3.9, "Headline View Customize Description Column"
- Section A.3.10, "Headline View Advanced Options"
- Section A.3.11, "Create/Edit Thumbnail View Search Result Template Page"
- Section A.3.12, "Thumbnail View Basic Information"
- Section A.3.13, "Thumbnail View Customize Description Column"

A.3.1 Search Result Templates for User Page

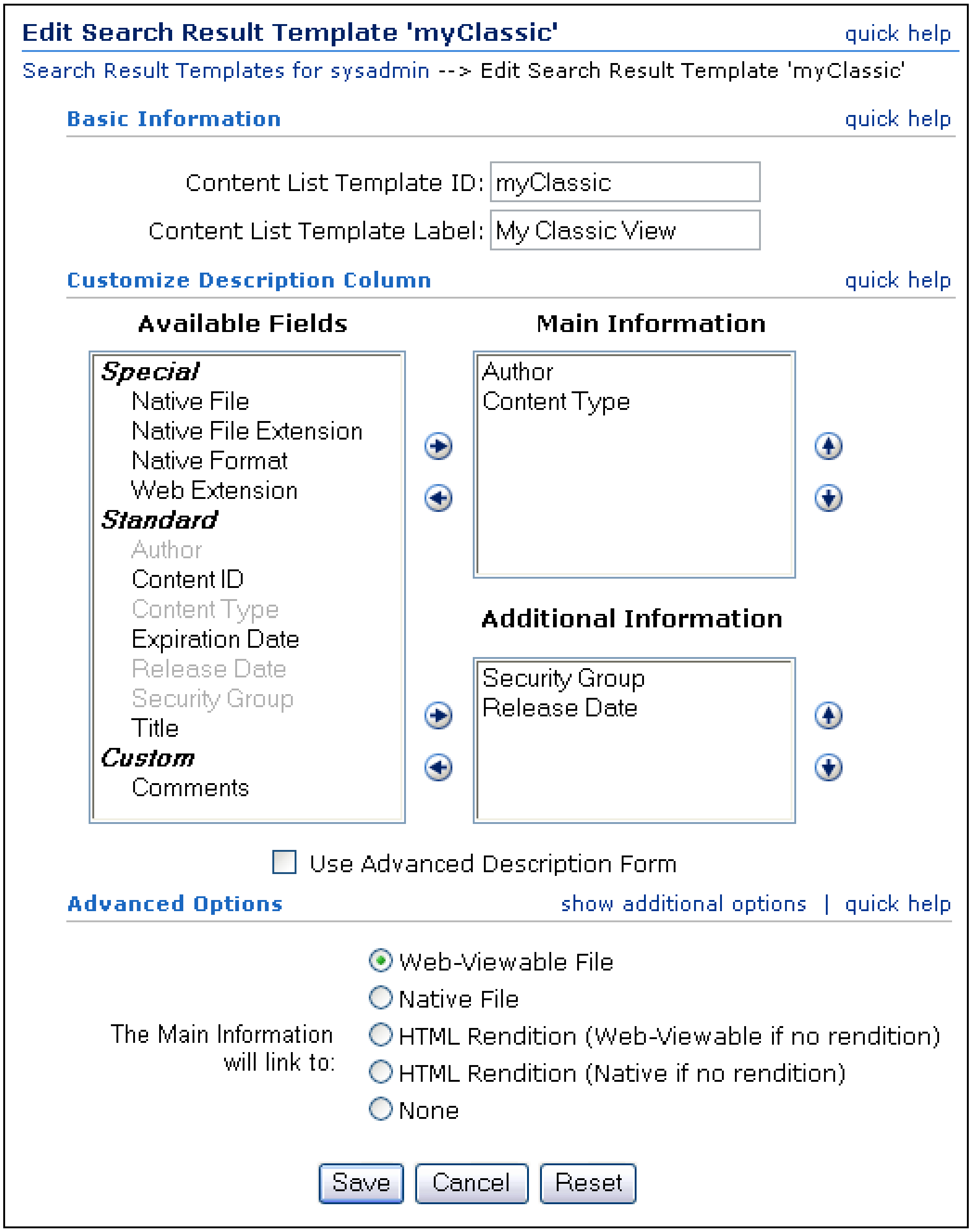
This page displays a list of all templates currently available and provides the option to add, edit, or delete custom templates based on the provided ones. You cannot modify the provided templates. To access this page, click **My Search Result Templates** in the My Content Server tray.



Column	Description
ID	The template ID uniquely identifies the template. Custom template IDs are specified on the Create/Edit Classic View Search Result Template Page when the template is added. The provided template IDs are displayed in bold. Custom templates are indented below the provided template on which they are based.
Label	The template label is listed in the **Content Actions** menu on a search results page and in the **Search Template** list on the User Profile Page. Choose something that helps you remember what the template does. Specify the label on the Create/Edit Classic View Search Result Template Page when you add the template.
Actions	**Add:** Displays the Create/Edit Classic View Search Result Template Page, enabling you to add a custom template. **Delete:** Deletes the custom template. **Edit:** Displays the Create/Edit Classic View Search Result Template Page for the selected custom template.

A.3.2 Create/Edit Classic View Search Result Template Page

The Create/Edit Classic View Search Result Template page enables you to add templates based on the Classic View, that specify what content item information is listed on a search results page and how that information is displayed.



To access this page, click the **Add Item** icon in the **Actions** column of the Classic View option on the Search Result Templates for User Page.

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of certain links in the display. After you have created a custom template, you can set that template as your default by setting it on the User Profile Page, or choose it from the **Content Actions** menu on a search results page.

There are three main areas of this page:

- Classic View Basic Information
- Classic View Customize Description Column

- Classic View Advanced Options

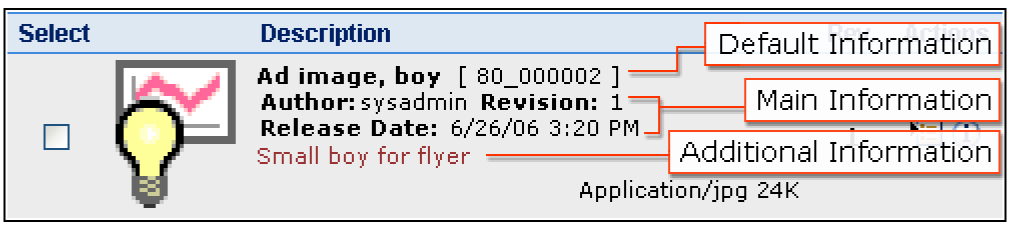
A.3.3 Classic View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

Item	Description
Content List Template ID	A unique identifier for the template. Content Server uses the identifier to manage your custom templates. Alphanumeric characters, underscores and dashes are recommended. The following characters, and spaces, are not allowed: ; / \ ? : @ & = + \ " # % < > * ~ | [ ] . ,
Content List Template Label	A descriptive identifier for the template, displayed on the User Profile Page and in the **Content Actions** menu on a search results page. Alphanumeric characters are recommended. You can use spaces.

A.3.4 Classic View Customize Description Column

This area determines what content is displayed in the **Description** column of a Classic View search result template.



<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Available Fields box</td><td>To move a field to a box on the right, select an item in this box and click the right arrow. You can include each available field one time only in either the Main Information box or the Additional Information box, unless you select the Use Advanced Description Form check box.

Special: Any special field in Content Server. Different components or configurations can add additional special fields. The following fields are available by default:
■ Native File
■ Native File Extension
■ Native Format
■ Web Extension
■ Web File Size
■ Vault File Size

Standard: The standard Content Server information fields:
■ Author
■ Content ID
■ Content Type
■ Expiration Date
■ Release Date
■ Security Group
■ Title

Custom: Comments and any custom fields created by your system administrator.

The title and content ID are displayed in all custom search result templates based on the Classic View, even if the fields are not specifically selected from the Available Fields box. If the Title or Content ID field is selected, it is duplicated.</td></tr>
<tr><td>Main Information box</td><td>Controls the display order of the fields in the Description area of a search results page, by displaying fields listed in the Text1 box first. You can enter additional display options, such as anchor or formatting tags, as either HTML or Idoc Script.</td></tr>
<tr><td>Additional Information box</td><td>Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. You can enter additional display options, such as anchor or formatting tags, as either HTML or Idoc Script.</td></tr>
<tr><td>Use Advanced Description Form</td><td>Select this check box to display an advanced version of the Main Information and Additional Information boxes. When you enable this option, the code for the display of each available field moved to the Main Information or Additional Information box is shown and can be edited directly. Additionally, you can include any item from the Available Fields box in the Main Information and Additional Information boxes multiple times.</td></tr>
</table>

A.3.5 Classic View Advanced Options

The following are the classic view advanced options and their respective descriptions.

Item	Description
The Main Information will link to	Determines what happens when you click the Content ID if it is displayed in a custom search results view. **Web-Viewable File**: Displays a Web-viewable version of the content item. **Native File**: Displays or downloads the native file. **HTML Rendition (Web-Viewable if no rendition)**: Displays the Web-viewable version of a content item if it is available, otherwise it attempts to convert the original content item to HTML for display. **HTML Rendition (Native if no rendition)**: Displays the Web-viewable version of a content item if it is available, otherwise it downloads the native file. **None**: Removes any link to the content ID. For example, select this if you do not want the Content ID link active, or if you are linking the content ID to another item, such as the Content Information page, using Idoc Script.
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page opens.

A.3.6 Create/Edit Headline View Search Result Template Page

This page enables you to add templates based on the Headline View, that specify what content item information is listed on a search results page and how that information is displayed. To access the Create/Edit Headline View Search Result Template page, click the **Add Item** icon in the Actions column of the Headline View option on the Search Result Templates for User Page.

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of any links in the display. After you have created a custom template, you can set that template as your default by setting it on the User Profile Page, or choosing it from the **Content Actions** menu on a search results page.

There are four main areas of this page:

- Headline View Basic Information
- Headline View Customize Columns
- Headline View Customize Description Column
- Headline View Advanced Options

A.3.7 Headline View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

Item	Description
Content List Template ID	A unique identifier for the template. Content Server uses the identifier to manage your custom templates. Alphanumeric characters, underscores, and dashes are recommended. The following characters, and spaces, are not allowed: ; / \ ? : @ & = + \ " # % < > * ~ | [ ] . ,

Item	Description
Content List Template Description	A descriptive identifier for the template, displayed on the User Profile Page and in the **Content Actions** menu on a search results page. Alphanumeric characters are recommended. You can use spaces.

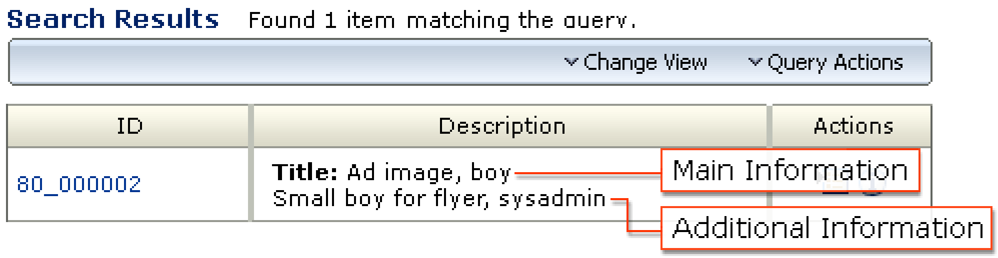
A.3.8 Headline View Customize Columns

The Customize Columns area is available only for custom templates based on the provided *Headline View* template. Use it to determine the columns displayed and their order on a search result page.

Item	Description
Available Fields	To move a field to the Columns box, select an item and click the right arrow. Special: Any special field in Content Server. Different components or configurations can add additional special fields. The following fields are available by default: ■ Native File ■ Native File Extension ■ Native Format ■ Web Extension ■ Web File Size ■ Vault File Size Standard: The standard Content Server information fields: ■ Author ■ Content ID ■ Content Type ■ Expiration Date ■ Release Date ■ Security Group ■ Title Custom: Comments, profiles, and any custom fields created by your system administrator.
Columns	Lists the fields you selected to display as separate columns on a search results list. Select a field in this box and click the up or down arrow to adjust the column order. Select a field in this box and click the left arrow to remove the column from the results list.

A.3.9 Headline View Customize Description Column

This area determines what content is displayed in the description column of a Headline View search result template. The **Description** field must be selected in the Customize Columns area to display on a search results page for this section to have any effect.



Item	Description
Available Fields	Select an item in this box and click the right arrow to move the field to the Columns box. You can include each available field one time only in either the Main Information section or the Additional Information section, unless the **Use Advanced Description Form** check box is selected. Special: Any special field in Content Server. Different components or configurations can add additional special fields. The following fields are available by default: ■ Native File ■ Native File Extension ■ Native Format ■ Web Extension ■ Web File Size ■ Vault File Size Standard: The standard Content Server information fields: ■ Author ■ Content ID ■ Content Type ■ Expiration Date ■ Release Date ■ Security Group ■ Title Custom: Comments and any custom fields created by your system administrator.
Main Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text1 box first. You can enter additional display options, such as anchor or formatting tags, either HTML or Idoc Script.
Additional Information	Controls the display order of the fields in the Description area of a search results page by displaying fields listed in the Text2 box after those listed in Text1. You can enter additional display options, such as anchor or formatting tags, as either HTML or Idoc Script.
Use Advanced Description Form	Enabling this option displays an advanced version of the Main Information and Additional Information fields. When enabled, the code for the display of each available field moved to the Main Information or Additional Information box is shown and can be edited directly. Additionally, you can include any item from the Available Fields box in the Main Information and Additional Information boxes multiple times.

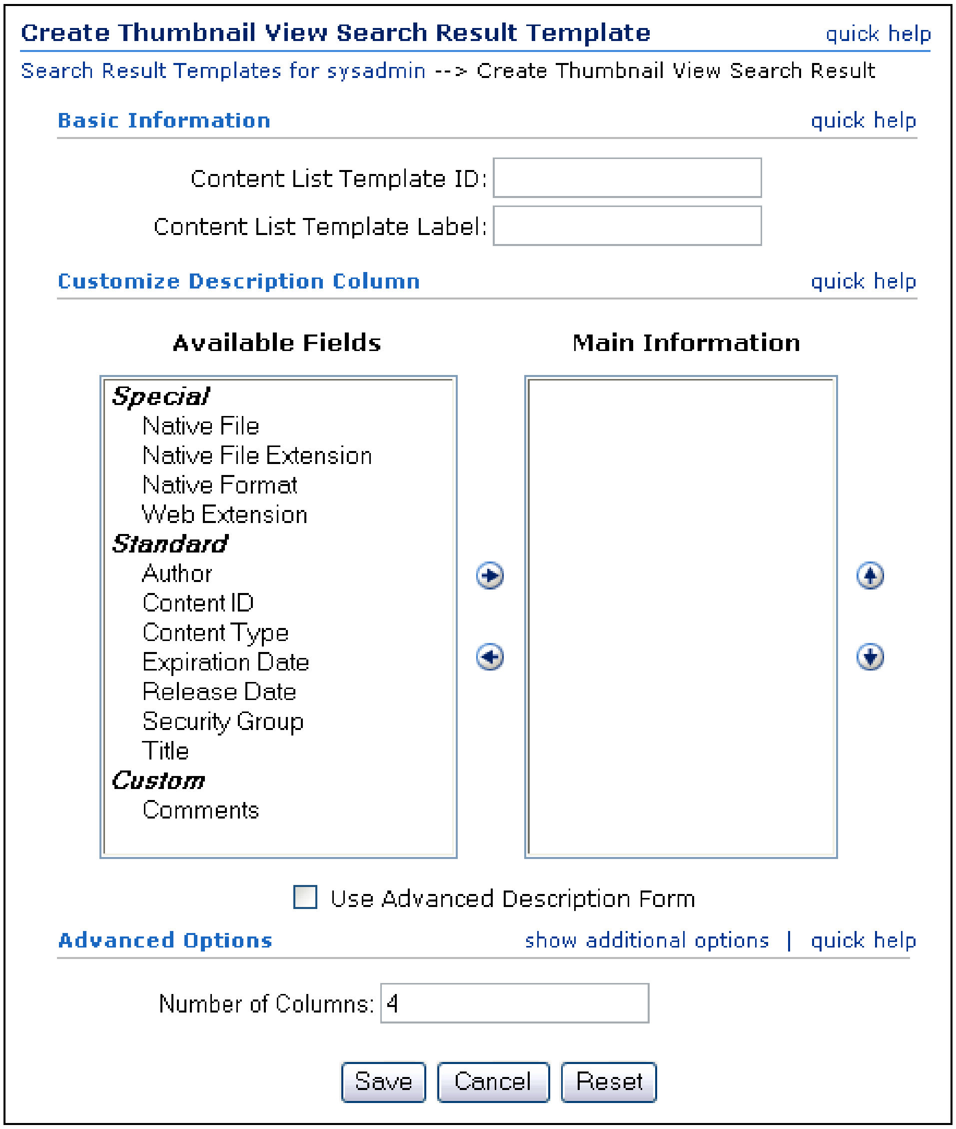
A.3.10 Headline View Advanced Options

The following are the headline view advanced options and their respective descriptions.

Item	Description
The content ID column will link to	Determines what happens when you click the Content ID if it is displayed in a custom search results view. **Web-Viewable File**: Displays a Web-viewable version of the content item. **Native File**: Displays or downloads the native file. **HTML Rendition (Web-Viewable if no rendition)**: Displays the Web-viewable version of a content item if it is available, otherwise it attempts to convert the original content item to HTML for display. **HTML Rendition (Native if no rendition)**: Displays the Web-viewable version of a content item if it is available, otherwise it downloads the native file. **None**: Removes any link to the content ID. For example, select this if you do not want the Content ID link active, or if you are linking the content ID to another item, such as the Content Information page, using Idoc Script.
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page opens.
Number of Columns (Thumbnail-based templates only)	Specifies the number of columns across the result grid.

A.3.11 Create/Edit Thumbnail View Search Result Template Page

The Create/Edit Thumbnail View Search Result Template page allows you to add templates based on the Thumbnail View, that specify what content item information is listed on a search results page and how that information is displayed.



To access this page, click **Add Item** in the Actions column of the Thumbnail View option on the Search Result Templates for User Page.

When creating a template you must specify a unique ID, a descriptive name, what content information is displayed and how, and the behavior of any links in the display. After you have created a custom template, you can set that template as your default by setting it on the User Profile Page, or choosing it from the **Content Actions** menu on a search results page.

There are three main areas of this page:

- Thumbnail View Basic Information
- Thumbnail View Customize Description Column
- Thumbnail View Advanced Options

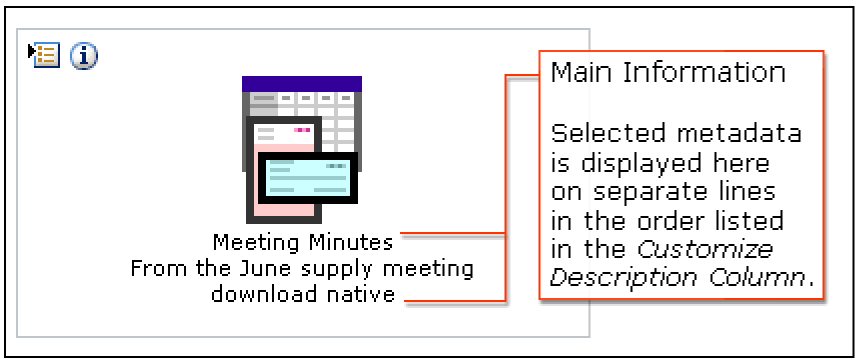
A.3.12 Thumbnail View Basic Information

The basic information fields of each template define the unique identifier and descriptive label for the created template.

Item	Description
List Template ID	A unique identifier for the template. Content Server uses the identifier to manage your custom templates. Alphanumeric characters, underscores and dashes are recommended. The following characters, and spaces, are not allowed: ; /\ ? : @ & = + \ " # % < > * ~ | [ ] . ,
List Template Description	A descriptive identifier for the template, displayed on the User Profile Page and in the **Content Actions** menu on a search results page. Alphanumeric characters are recommended. You can use spaces.

A.3.13 Thumbnail View Customize Description Column

This area determines what content is displayed in the description column of a Thumbnail View search result template.



Item	Description
Available Fields	To move the field to the Columns box, select an item in this box and click the right arrow. You can include each available field one time only in either the Main Information section or Additional Information section, unless the **Use Advanced Description Form** check box is selected. Special: Any special field in Content Server. Different components or configurations can add additional special fields. The following fields are available by default: ■ Native File ■ Native File Extension ■ Native Format ■ Web Extension ■ Web File Size ■ Vault File Size Standard: The standard Content Server information fields: ■ Author ■ Content ID ■ Content Type ■ Expiration Date ■ Release Date ■ Security Group ■ Title Custom: Comments and any custom fields created by your system administrator.
Main Information	Controls the display order of the fields in the Description column of a search results page by displaying fields listed in the Text1 box first. You can enter additional display options, such as anchor or formatting tags, as either HTML or Idoc Script.
Use Advanced Description Form	Enabling this option displays an advanced version of the Main Information and Additional Information fields. When enabled, the code for the display of each available field moved to the Main Information or Additional Information box is shown and can be edited directly. Additionally, you can include any item from the Available Fields box in the Main Information and Additional Information boxes multiple times.

A.3.14 Thumbnail View Advanced Options

The following table lists the thumbnail view advanced options.

Item	Description
show/hide additional options	Displays a text field for entering additional Idoc Script options to control the display of a search results page. Idoc Script entered into this field is evaluated and included before the search results page is displayed.
Number of Columns	Specifies the number of columns across the result grid.

A.4 Access Control Lists (ACL)

This functionality must be enabled by your system administrator.

This section covers the following topics:

- Section A.4.1, "Access Control List Users, Groups, and Roles"
- Section A.4.2, "Access Control List Permissions"

A.4.1 Access Control List Users, Groups, and Roles

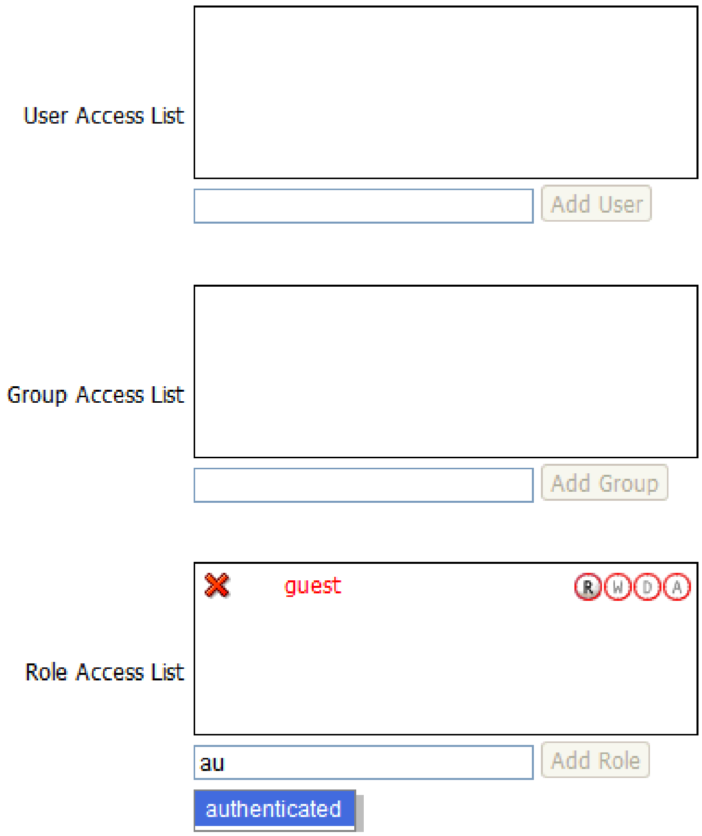
An access control list is a list of users, groups, or enterprise roles with permission to access or interact with a content item. If you are using the Folders interface, you can also apply access control lists to folders. For more information about folders, see Section A.10, "Folders Interface."

Depending on how access control list security is configured, three new fields are available for use when adding, modifying, or searching for folders or content items:

- **User Access List**
- **Group Access List**
- **Role Access List**

> **Note:** By default, blank access control lists do not affect access to the content item. This feature is configurable, however, so that explicit access is required (blank access control lists prevent access to the item).

Access control list security for users, groups, and roles provide fields similar to the following:



Element	Description
User Access List	Specifies the access control list users who have access to the item and the permissions assigned to each user. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add User	Adds the selected name to the user access list. New or modified items are shown in red. To remove a name from the list, click the red X next to the name.
Group Access List	Specifies the access control list groups who have access to the item and the permissions assigned to each group. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add Group	Adds the selected name to the group access list. To remove a name from the list, click the red X next to the name.

Element	Description
Role Access List	Specifies the access control list roles who have access to the item and the permissions assigned to each role. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add Role	Adds the selected name to the role access list. To remove a name from the list, click the red X next to the name.

A.4.2 Access Control List Permissions

Each item in the user, group, or role access control lists can have the following permissions:

Permissions	Description
Read	Allowed to view the content item.
Write	Allowed to view, check in, check out, and get a copy of the content item.
Delete	Allowed to view, check in, check out, get a copy, and delete the content item.
Admin	Allowed to view, check in, check out, get a copy, and delete the content item, and to modify the access control list entries and the permissions assigned to them.

To assign a permission, click the associated icon. Permissions are "cumulative." If you assign write, you automatically assign read. If you assign admin, you automatically assign read, write, and delete.

To remove a permission, click the previous icon in the sequence. For example, to remove the admin permission, click the icon for the delete permission.

A.5 Referenced Links Interface (optional)

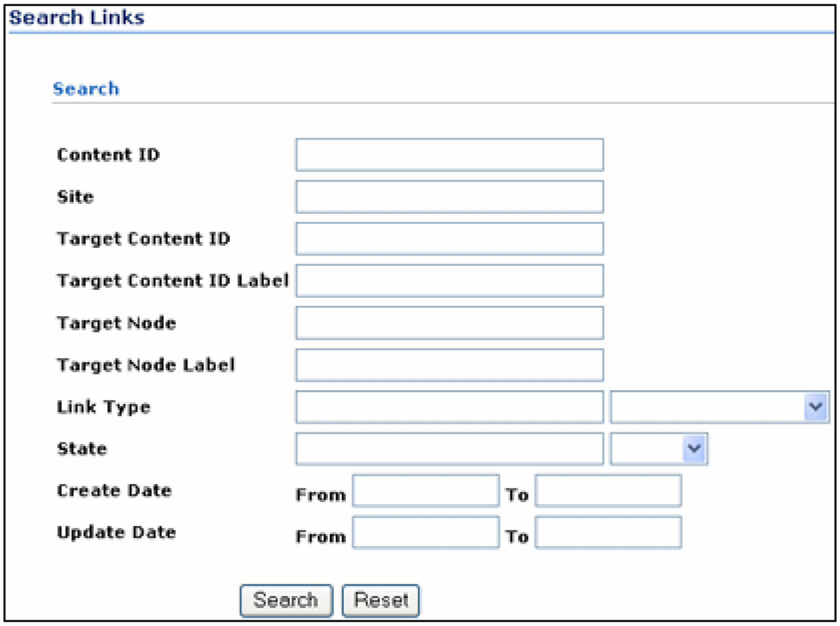
This functionality is not available unless the Link Manager component has been added by your system administrator.

This section describes the following pages and options:

- Section A.5.1, "Search Links Page"
- Section A.5.2, "Link Search Results Page"
- Section A.5.3, "Link Item Actions Menu"
- Section A.5.4, "Link References on Content Information Page"
- Section A.5.5, "Link Info Page"

A.5.1 Search Links Page

The Search Links page searches for links, using criteria stored in Content Server repository database.



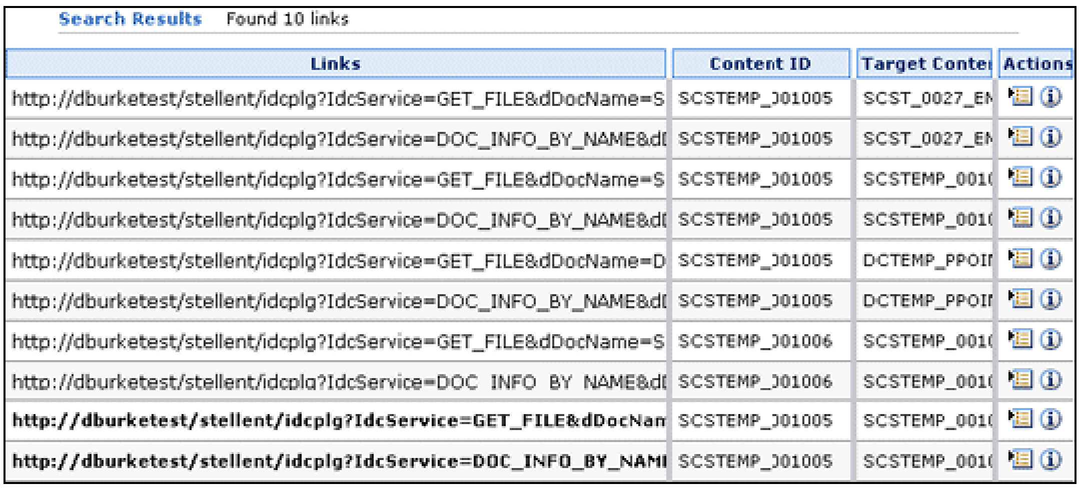
The Search Links page is useful for finding valid or invalid links, to determine where a resource is used, or to determine how deleting a content item affects other documents linking to it, and so on. If the optional Links Manager component is installed, you can click the **Managed Links Search** link in the Content Management tray to access the Search Links page.

Element	Description
Content ID	The unique identifier for each content item.
Site	An identifier for a specific Web location that is associated with a link.
Target Content ID	Associated with links where LinkManager was able to determine the dDocName.
Target Content ID Label	The label associated with the target content ID. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Target Node	The node used to display search results. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Target Node Label	The label associated with the target node. This field is applicable only if you are using Site Studio. Please refer to the Site Studio product documentation for detailed information.
Link Type	Specifies links that are of the type selected from the list. Types include service, external, internal, relative, and Site Studio-specific types of Page, Node, Relative, Absolute, and Service links.
State	Specifies valid or invalid links.
Create Date From/To	Link Manager generates and uses create dates to manage the links and monitor activity performed on the links. Create Date indicates when the link first entered the system (when it was extracted and added to the ManagedLinks table). The From and To fields enable you to specify a date range based on the creation dates of links.

Element	Description
Update Date From/To	Link Manager generates and uses update dates to manage the links and monitor activity performed on the links. Update Date indicates when the link was last updated. The From and To fields enable you to specify a date range based on the update dates of links.
Search	Initiates the search query using the specified field values.
Reset	Clears any populated fields on the page.

A.5.2 Link Search Results Page

This page displays the results of a link search. Links that are invalid or broken in a Link Search Results Page are listed using bold font.



The Link Manager-specific Link Item Actions Menu and **Content Info** icons are available in the **Actions** column. Click the **Content Info** icon to display the Content Information page of the document that contains the link.

A.5.3 Link Item Actions Menu

Click the **Actions** menu to display the applicable link management menu.

The menu options include:

- **Content Information:** Displays the Content Information page of the document containing the link. This Content Information page contains options that display (References Show) or hide (References Hide) any related links contained in or links to this content item.
- **Target Content Info:** Displays the Content Information page of the document referenced by the link. Again, this Content Information page contains References options that displays or hides any related links contained in or links to this content item.

- **Link Info:** Displays the Link Info Page for this link.

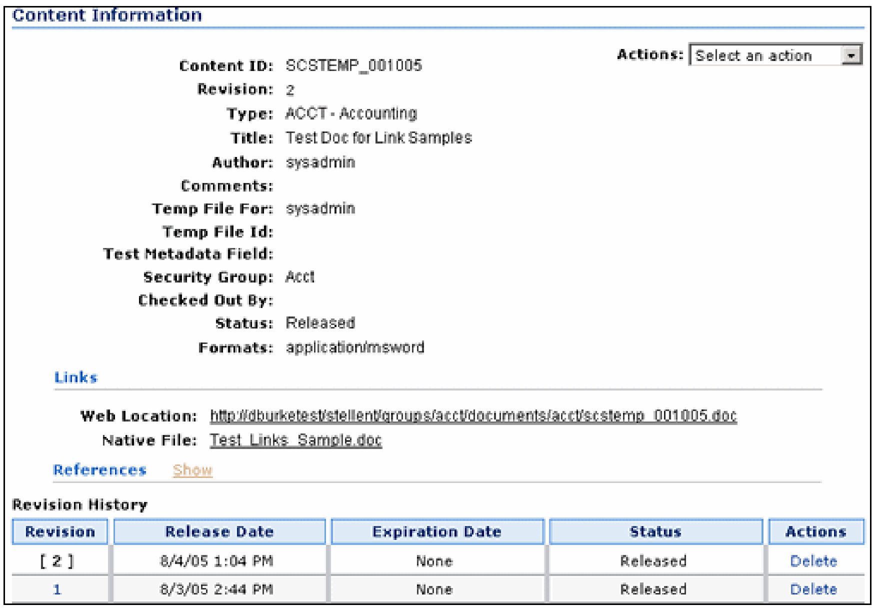
A.5.4 Link References on Content Information Page

If a content item does not contain any references and no other content items reference it, then the **References** options are not displayed on its Content Information page. However, if a content item does contain one or more references or has links that reference it, or both, the **References** options are displayed.

You can click **Show** next to **References** to see if the content item references or is referenced by other content items, or both.

A.5.4.1 Hide Link References

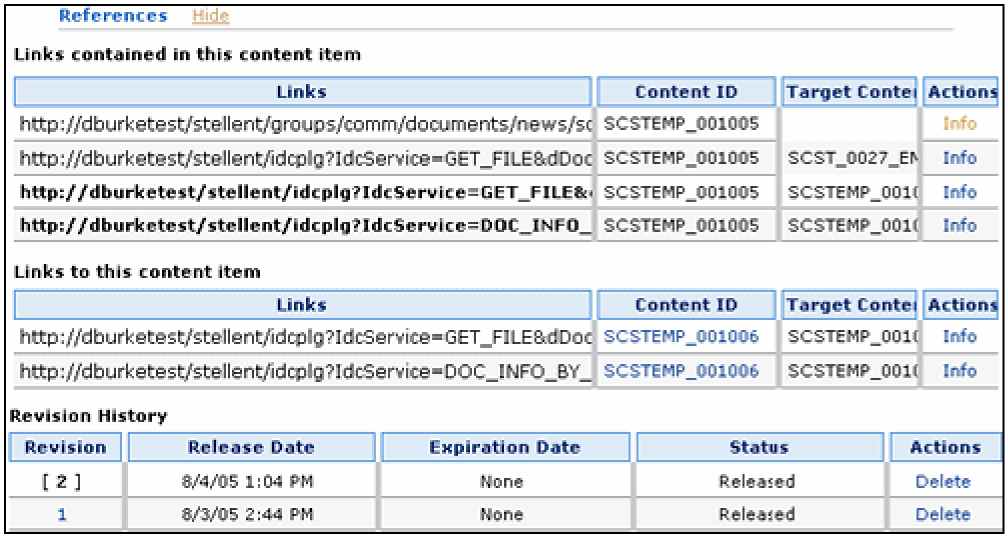
This is the default display option for the Content Information page when the content item has applicable links associated with it.



The References options are included on the page but the individual sections are not displayed. The Show option is activated. Click **Show** to open the References sections that list all applicable links associated with the content item.

A.5.4.2 Show Link References

Click **Show** to open the References sections that list all applicable links associated with the content item.



References Hide

Links contained in this content item

Links	Content ID	Target Conte	Actions
http://dburketest/stellent/groups/comm/documents/news/sc	SCSTEMP_001005		Info
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDoc	SCSTEMP_001005	SCST_0027_EN	Info
http://dburketest/stellent/idcplg?IdcService=GET_FILE&	SCSTEMP_001005	SCSTEMP_001(	Info
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_	SCSTEMP_001005	SCSTEMP_001(	Info

Links to this content item

Links	Content ID	Target Conte	Actions
http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDoc	SCSTEMP_001006	SCSTEMP_001(	Info
http://dburketest/stellent/idcplg?IdcService=DOC_INFO_BY_	SCSTEMP_001006	SCSTEMP_001(	Info

Revision History

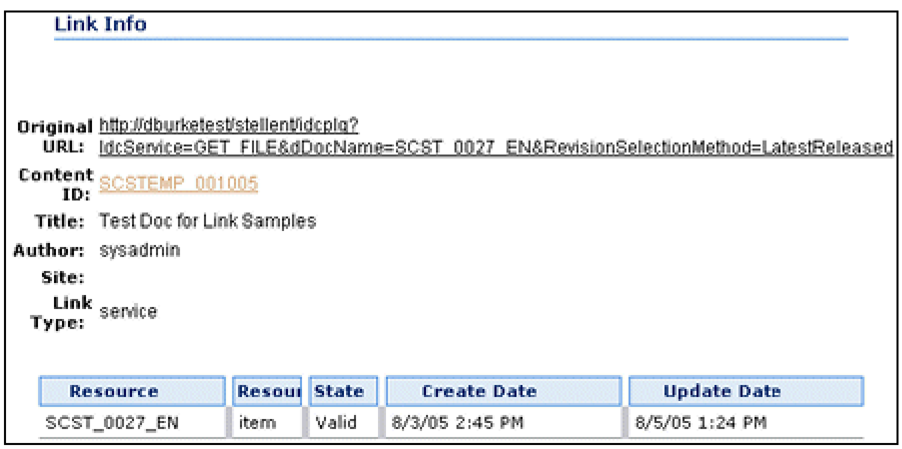
Revision	Release Date	Expiration Date	Status	Actions
[2]	8/4/05 1:04 PM	None	Released	Delete
1	8/3/05 2:44 PM	None	Released	Delete

The Links contained in this content item section lists all the links contained in this content item that reference other documents. The Links to this content item section lists all the links in documents that reference this content item. Links that are invalid or broken are listed using bold font. Click the **Info** icon in the Actions column to display the Link Info Page for that particular link.

When the References sections are open, the **Hide** option is activated. Click **Hide** to close the References sections and hides the lists of links.

A.5.5 Link Info Page

The Link Info page provides additional information about a link. The Content ID field contains an active link to the content item that contains this link.



Link Info

Original URL:	http://dburketest/stellent/idcplg?IdcService=GET_FILE&dDocName=SCST_0027_EN&RevisionSelectionMethod=LatestReleased
Content ID:	SCSTEMP_001005
Title:	Test Doc for Link Samples
Author:	sysadmin
Site:	
Link Type:	service

Resour	Resour	State	Create Date	Update Date
SCST_0027_EN	item	Valid	8/3/05 2:45 PM	8/5/05 1:24 PM

You can access this page from the Search Links Page or from the Content Information page.

A.6 Working with Content Items

This section describes the pages and options for working with content items.

This section covers the following topics:

- Section A.6.1, "Content Information Page"

- Section A.6.2, "Content Information - Signatures Tab"
- Section A.6.3, "Revision History"
- Section A.6.4, "Work In Progress Page"
- Section A.6.5, "Info Update Form"
- Section A.6.6, "Post Comment Form"
- Section A.6.7, "Discussion Info Page"
- Section A.6.8, "Content Information Page with Discussion Field"
- Section A.6.9, "Subscriptions Page"
- Section A.6.10, "Subscription Info Page"
- Section A.6.11, "Subscribe To "Item" Page"
- Section A.6.12, "Unsubscribe Page"
- Section A.6.13, "Sign Content Item Page"
- Section A.6.14, "Search for Local File Page"

A.6.1 Content Information Page

The content information page shows metadata and other information about a specific content item. You can access it from Search Results and the **Actions** menu or **Info** icon. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."

For example, you can use this page to determine when a file was released or to see the content item's revision history.

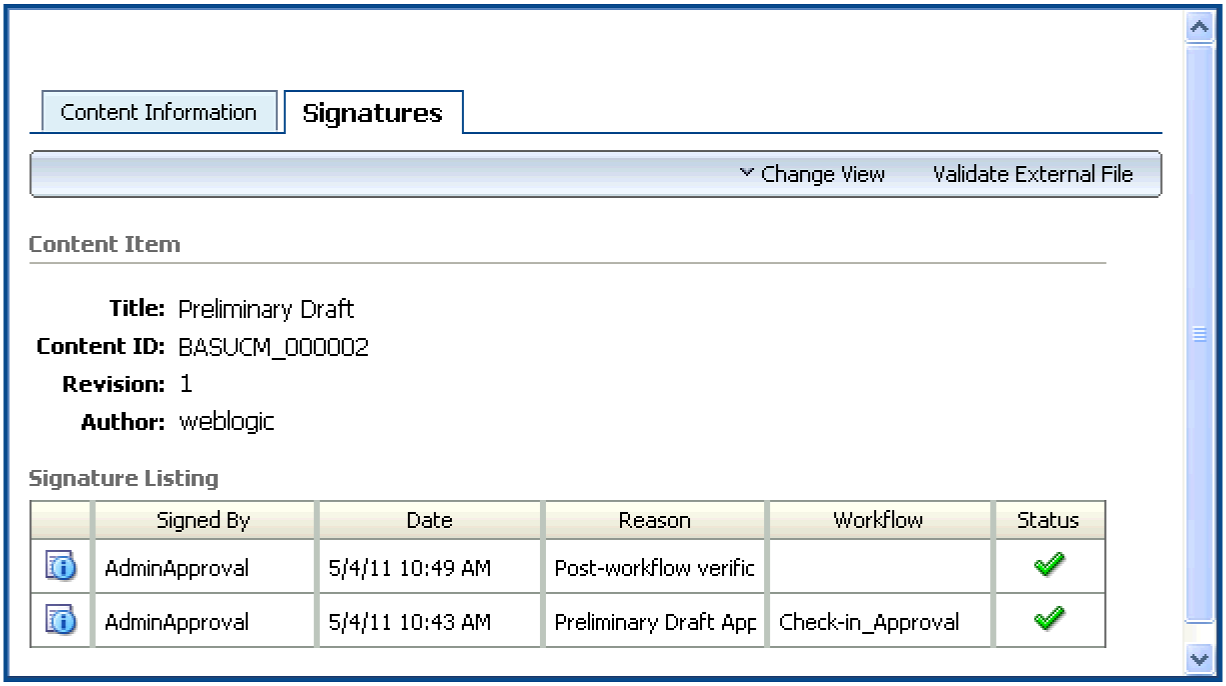
Note: Content Profiles can affect what content information is initially displayed on the Content Information page. If content meets a content profile defined by a system administrator, then only information meeting the profile criteria is displayed. If you are an administrator, an additional link for accessing the full content information is displayed in the page heading.

Element	Description
Content ID	The unique identifier for the content item. If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Revision	The revision number of this revision.
Type	The category of the document.
Title	The descriptive name for the content item.
Author	The user who checked in this revision. Click the link to open your e-mail program with a new message addressed to this user.
Comments	Additional notes about the content item.
Security Group	An identifier that specifies access permission to the content item.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Checked Out By	The user who has the content item checked out.
Status	The revision status indicating where the file is in its lifecycle.
Formats	The file format of the native file.
Web Location	The unique Web address for the Web-viewable file. Click the link to display the Web-viewable file.
Native File	The file name of the native file. Click the link to open or save a copy of the native file.
Discussion	Allows for the addition of a post to an associated threaded discussion of a content item. Associated discussions are stored as content items in Content Server, and identified by appending a *_d* to the end of the content ID of the item to which the discussion is associated. For example, an item with content ID *001* would have an associated discussion with content ID *001_d*. If you have a content item that has a document name that is within 1 of the database storage maximum, which is 30 by default, you cannot create a threaded discussion for it. Ask your administrator to increase the length of the field. **Create Discussion:** Creates a new discussion item in Content Server, associated with the content item. ***`content_id`*_d (*x* item):** Opens an existing discussion associated with the content item so you can add a new post. The number of posts is listed next to the discussion ID in parenthesis. For example, *001_d (4 items)* means that four posts have been made in the discussion associated with content ID 001.

Element	Description
Revision History section	Shows the complete revision history of the content item.
Folder Path	This information is displayed only if the content item is represented as a file in the folders hierarchy. **Folder Path**: Displays the path to the content item in the folders hierarchy. Click any folder in the path to display the content of the folder. **Show all shortcuts to this document**: Displays the folder path to the location of each shortcut to the current content item.
Full Information	Displays the full content information page. This link is displayed only if a content item meets criteria defined by the system administrator in a content profile rule and if you have administrator privileges.
Content Actions menu	**Check Out:** Checks out the content item and displays the Check-Out Confirmation Page. This option is displayed only if the content item is not checked out. **Undo Check Out:** Cancels the content item check-out. This option is displayed only if the content item is checked out. You can undo check-out only on content items you checked out, or you must have Admin permission for the content item. **Update:** Opens the Info Update Form, which enables you to change the content item's metadata. **Check In Similar:** Displays the Content Check-In Form with metadata fields filled in to match the checked in content item. **Subscribe:** Opens the Subscriptions Page, which enables you to be notified of new revisions to the content item. This button is displayed if you have not subscribed to the content item. **Unsubscribe:** Cancels your subscription to the content item. This option is displayed if you have subscribed to the content item and no criteria subscriptions are enabled on your system. **Subscriptions:** Opens the Subscriptions Page. This option is displayed if you have subscribed to the content item and criteria subscriptions are enabled on your system. **Check Out and Open:** Opens the item directly in a WebDAV-compliant native application from Content Server. This option is available only on the current revision, and only if the optional Check Out and Open component is installed and configured. **Add to Folder:** Add the content item to a selected folder as a file (primary link). This option is available only if the Folders component is enabled and only if a primary link to the content item does not yet exist in the folder hierarchy. **Add to Folder as Shortcut:** Add the content item to a selected folder as a shortcut (secondary link). This option is available only if the Folders component is enabled.
Email menu	**Send link by e-mail:** Opens your e-mail program with a new message that contains a link to the URL (Web address) of the Web-viewable file.
Sign menu	This menu is displayed only if you have the Electronic Signature component enabled. **Sign Content:** Opens the Sign Content Item Page, which enables you to provide an electronic signature for the selected revision.

A.6.2 Content Information - Signatures Tab

The signatures tab shows information about the all signatures for the content item revision selected on the content information page, including any associated workflows and the validation status of each signature. This page appears as a tab at the top of the Content Information Page if the content item revision selected on that page has one or more electronic signatures associated with it.

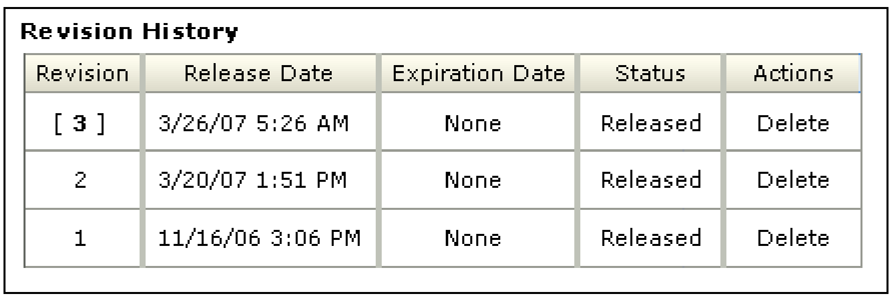


Element	Description
Content Item	This section displays basic content information, including the title, content ID, revision, and author.
Signature Listing	This section displays information about each signature for the revision selected on the Content Information page. If you choose **All Revisions** from the **Change View** menu, this section displays signature information for all revisions of the content item. Your system administrator may also define additional signature metadata fields. This table describes the information provided by default.
Signature Details icon	Displays complete metadata for the associated signature.
Signed by	The full name of the user who signed the content item.
Date	The date on which the content item was signed.
Reason	The reason for the signature. This comment is provided by the user who signs the content item.
Workflow	If the signature is provided as part of workflow step, this column lists the name of the associated workflow.
Status	Indicates whether the signature is valid. Validation is displayed when you view the signatures for a single revision. This is the default.

Element	Description
Revision	Indicates the revision to which the signature applies. The revision replaces the Status column when you choose **All Revisions** from the **Change View** menu.
Change View menu	**All Revisions:** Updates the page to display signature information for all revisions of the content item with the currently selected revision in bold and surrounded by brackets. **Single Revision:** Updates the page to display information for each signature for the revision selected on the Content Information page.
Search For File in Repository	Opens the Search for Local File Page to compare an external file in a local file system to all signed revisions of a content item.

A.6.3 Revision History

You can use the Revision History section of the Content Information Page to show and delete revisions of a content item.

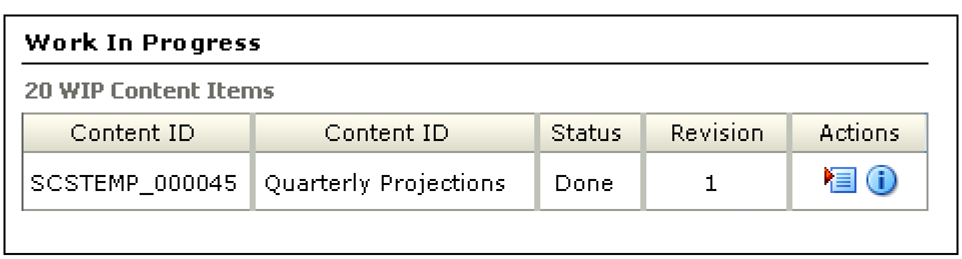


Revision History

Revision	Release Date	Expiration Date	Status	Actions
[**3**]	3/26/07 5:26 AM	None	Released	Delete
2	3/20/07 1:51 PM	None	Released	Delete
1	11/16/06 3:06 PM	None	Released	Delete

Element	Description
Revision	Click a revision number to displays the Content Information Page for that revision.
Release Date	The date and time the revision was released.
Expiration Date	The date and time the revision is no longer available for searching or viewing in Content Server, if any.
Status	The revision status indicating where the file is in its lifecycle.
Actions	Click **Delete** to remove the revision from Content Server. You must have delete permission for the content item to delete a revision.

A.6.4 Work In Progress Page



Work In Progress

20 WIP Content Items

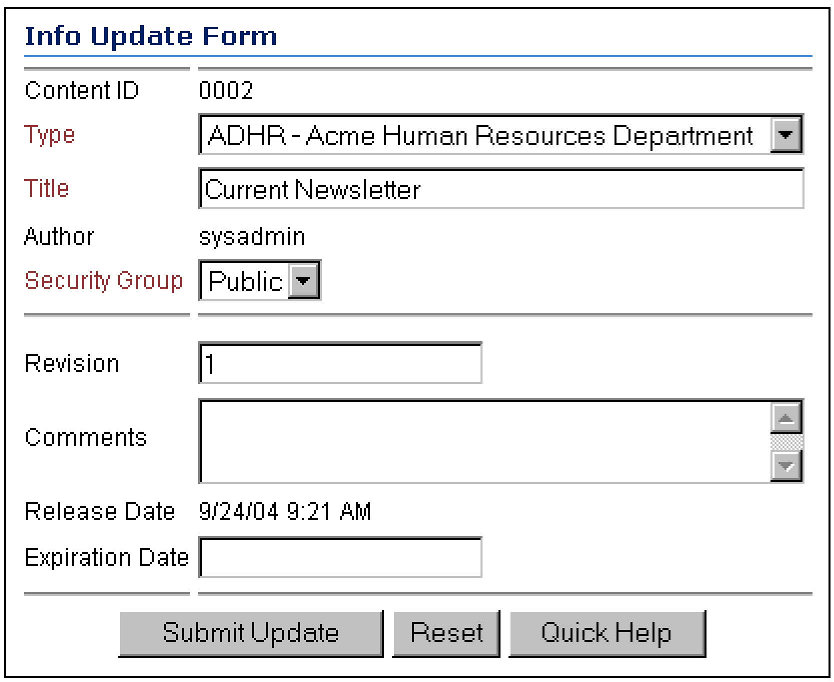
Content ID	Content ID	Status	Revision	Actions
SCSTEMP_000045	Quarterly Projections	Done	1	

The Work In Progress page displays content items that are in the `GenWWW` or `Done` status. To access this page, click **Work In Progress** in the **Content Management** tray.

Element	Description
Content ID	Click **Content ID** to display the Web-viewable file.
Title	Displays the title of the content item. Click the Content ID link to display the Web-viewable file.
Status	Displays the revision status of the content item.
Revision	Displays the revision number of the content item.
Actions menu	Displays a contextual menu allowing you to check out the content item or to display the Content Information Page for the content item.
Info icon	Displays the Content Information Page for the content item.

A.6.5 Info Update Form

You can use the Info Update Form change a content item's metadata without creating a new revision. Required fields are indicated by an asterisk (*). For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."



To access this page, select **Update** from the **Actions** list on the Content Information Page for a content item.

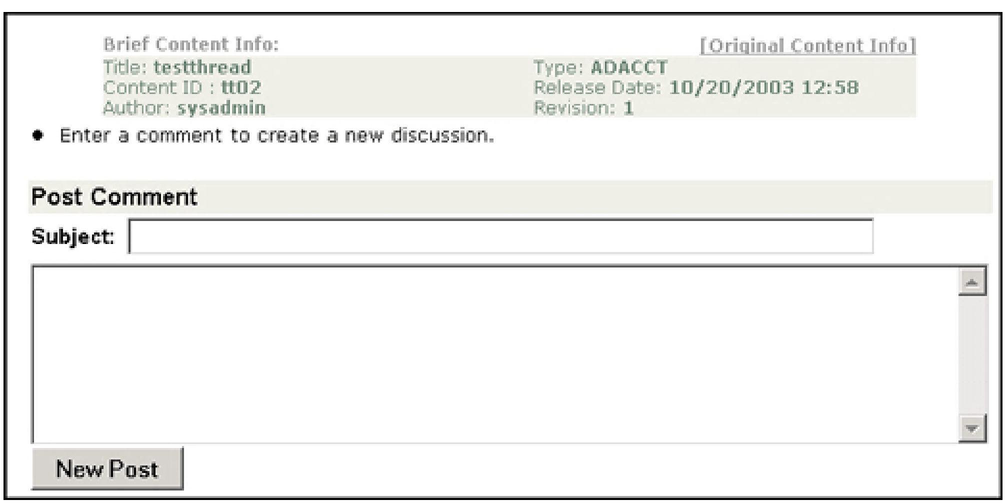
Element	Definition
Content ID*	The unique identifier for the content item. You cannot change this value. If your content server uses an Oracle database, all content IDs are converted to uppercase letters automatically.
Type*	The category of the file. You must select from a list of predefined values.

Element	Definition
Title*	A descriptive name identifying the revision. The title you enter must be 249 or fewer characters in length.
Author*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. You can change this value only if you have administrative permission.
Security Group*	An identifier that specifies access permission to the content item. You can select from the list of predefined values.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Revision	The revision number.
Comments	Additional notes about the content item. The maximum length is 255 characters.
Release Date	The date that the current revision was released to Content Server. You cannot change this value.
Expiration Date	The date and time that the revision is no longer available for searching or viewing in Content Server. ■ Upon expiration, the revision is not deleted, but only an administrator can access it. ■ If a value is entered, the date is required; the time is optional.
Submit Update	Saves the specified metadata.
Reset	Resets all metadata fields to their original values.

* Required metadata fields

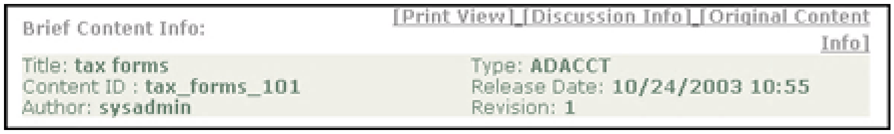
A.6.6 Post Comment Form

If your system administrator enabled the ThreadedDiscussions component, you can access the Post Comment Form from numerous popup menus and links. Use this form to post a comment or reply to a comment on a content item.



A.6.6.1 Discussion Form Menu

If your system administrator enabled the ThreadedDiscussions component, a new discussion form has the Original Content Info menu link only. After a discussion has been initiated, the Print View and Discussion Info menu links become available.

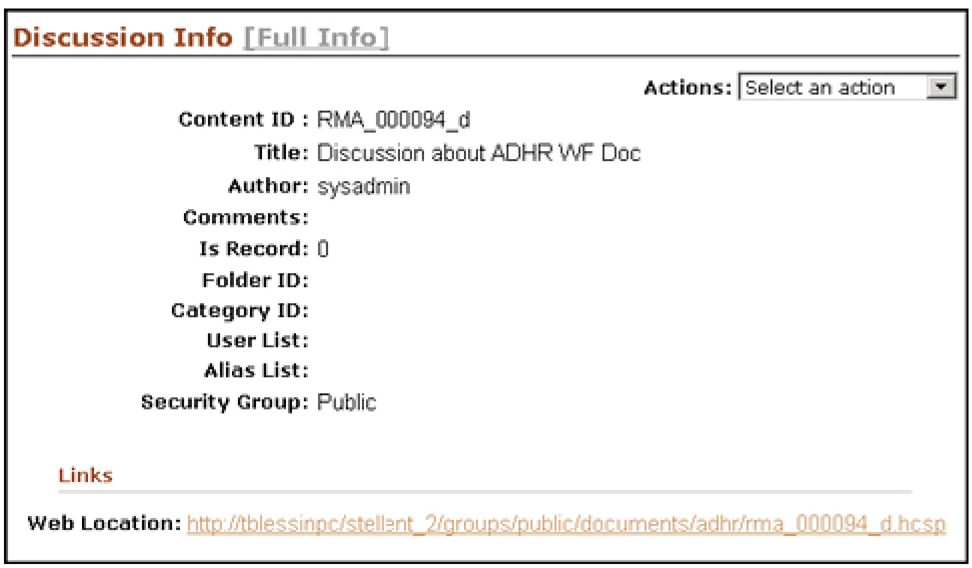


The following table describes the menu options.

Menu Option	Description
Print View	Opens a print view of the discussion that you can elect to print. A "printed by user" message prints at the top of the discussion page for you.
Discussion Info	Opens the Discussion Info Page for discussion content.
Original Content Info	Opens the Content Information page for the discussion content.

A.6.7 Discussion Info Page

If your system administrator enabled the ThreadedDiscussions component, the Discussion Info Page is a brief summary page about a discussion.

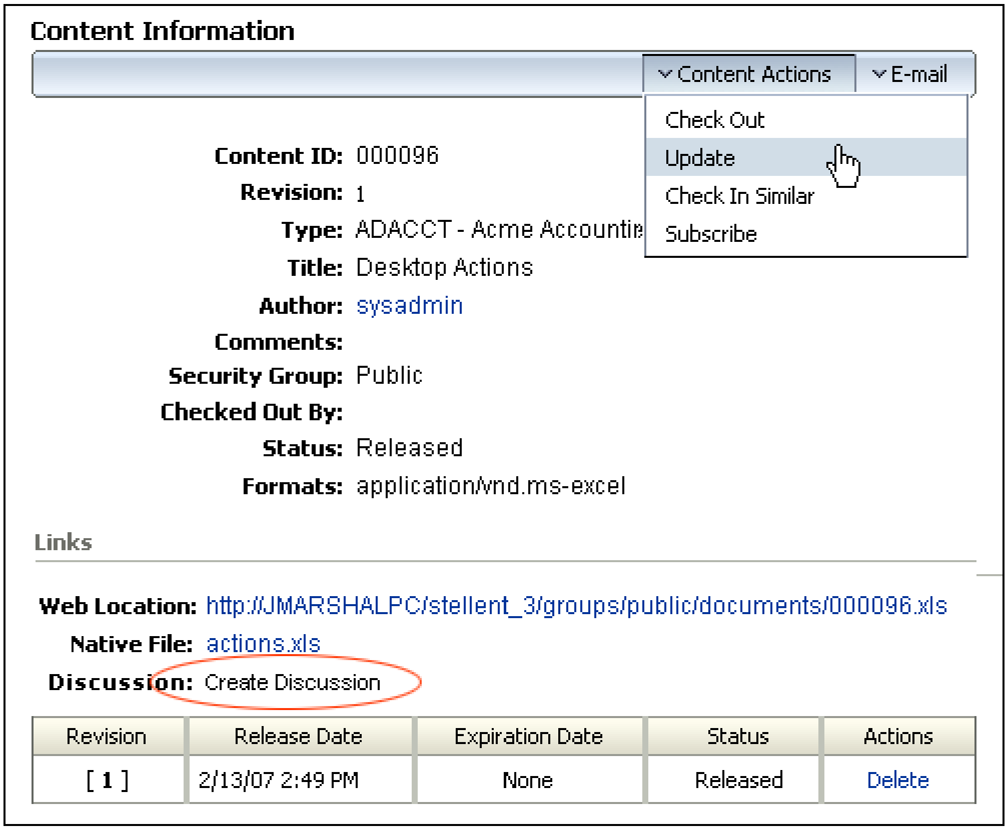


This page is only for content type that is a discussion, as denoted by the "_d" suffix. Click **Full Info** to access the Content Information page.

To access the Post Comment Form for the discussion thread, click the **Web Location** link, which accesses the Threaded Discussion (hcsp) form.

A.6.8 Content Information Page with Discussion Field

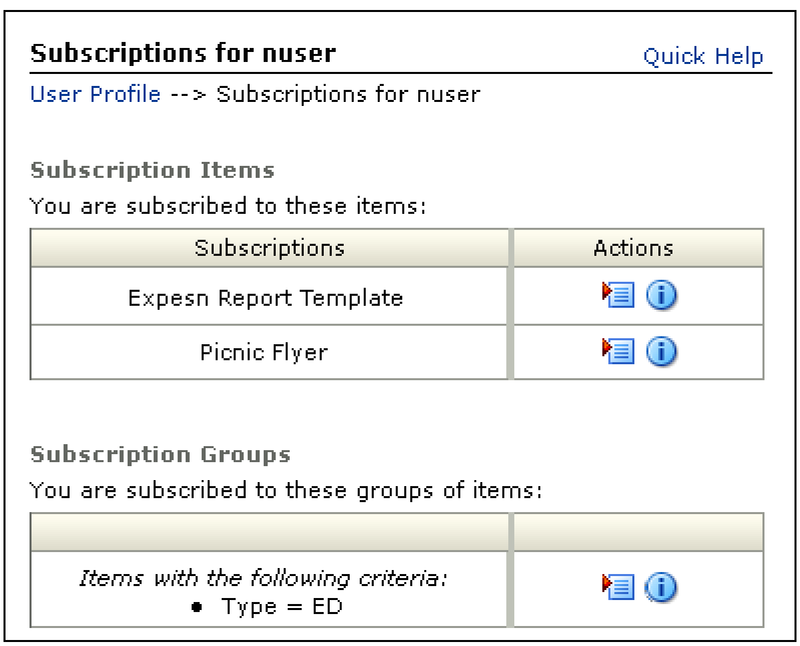
If your system administrator enabled the ThreadedDiscussions component, the Content Information page contains the additional **Discussion** field.



The Content Information Page for content that is a discussion itself does not contain the Discussion link, since it is the discussion.

A.6.9 Subscriptions Page

You can use the Subscriptions page to view your current subscriptions.

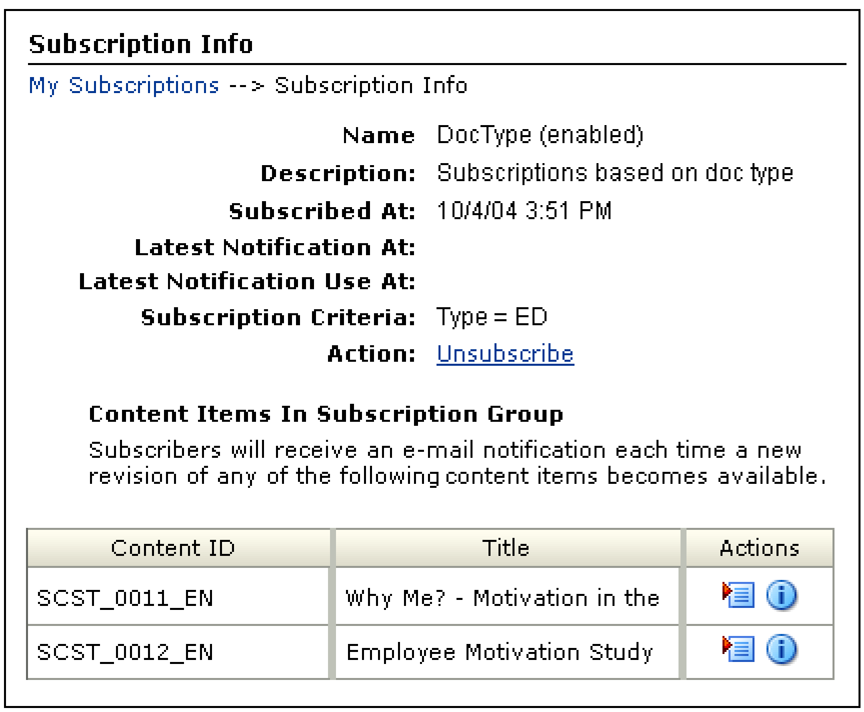


To access this page, click **My Subscriptions** in the **My Content Server** tray.

Field	Description
Locator Links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Click a link to display the page named by the link.
Subscriptions	Displays the title of the content item. Click the title link to display the Web-viewable file.
Actions	**Actions** menu: ■ **Content Information link:** Displays the Content Information Page. ■ **Unsubscribe link:** Cancels your subscription to the content item. This link is displayed only if you subscribe to the content item. **Info** icon: Display the Content Information Page.
Subscriptions Groups	Displays the subscription criteria for the content group.
Actions menu	**Subscription Info link:** Displays the Subscription Info Page. **Unsubscribe link:** Cancels your subscription to the subscription group.
Info icon	Displays the Subscription Info Page.

A.6.10 Subscription Info Page

You can use the Subscription Info page to identify when you were subscribed to a file or group of files and when you were last notified about a new revision.

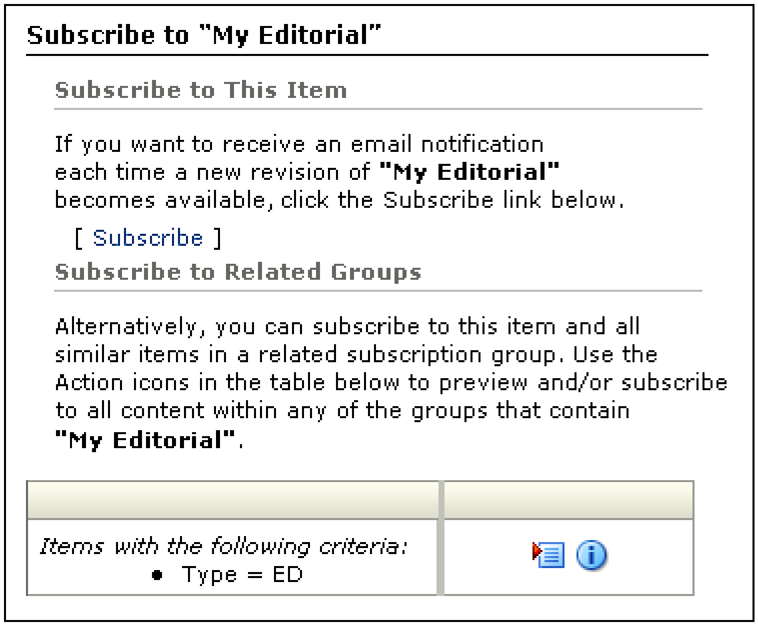


To access this page, select **Subscription Info** from the Content Actions menu on the Content Information Page.

Field	Description
Locator links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Click a link to display the associated page.
Name	The name of the subscription.
Description	The description assigned by the system administrator.
Subscribed At	The date and time that you subscribed to the file or your system administrator subscribed you to the file.
Latest Notification At	The most recent date and time that you were sent an e-mail notification from this subscription.
Latest Notification Use At field	The most recent date and time that you accessed a content item from an e-mail notification from this subscription.
Subscription Criteria	Shows the criteria for the subscription.
Action	Click **Unsubscribe** to cancel your subscription.
Content ID	Shows the content IDs of the content items included in the subscription. Click a Content ID link to display the Web-viewable file.
Title	Shows the titles of the content item included in the subscription.
Actions menu	**Content Information:** Displays the Content Information Page. **Check In:** (Seen if content is checked out by a user.) Displays the Content Check-In Form. **Check Out:** (Seen if content is not checked out.) Checks out the item and displays the Check-Out Confirmation Page. **Check In Similar:** Displays the Content Check-In Form with metadata fields filled in to match this content item. **Send link by e-mail:** Opens a new e-mail with links to the content item's Web-viewable and native files, and the Content Information Page.
Info icon	Displays the Content Information Page.

A.6.11 Subscribe To "Item" Page

You can use the Subscribe To "Item" page to specify whether you want a file subscription or a criteria subscription.

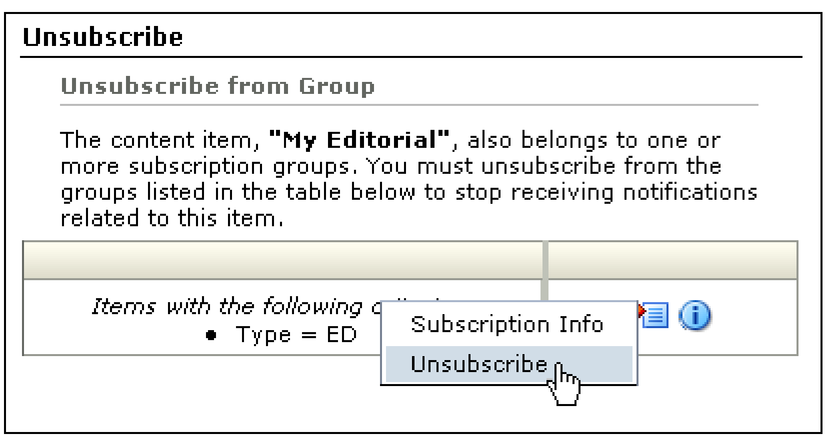


To access this page, select **Subscribe** from the Content Actions menu on the Content Information Page.

Element	Description
Subscribe	Subscribes to the content item and not the group.
Subscriptions	Lists the criteria of the group to which the item belongs.
Actions menu	**Subscription Info:** Displays the Subscription Info Page. **Subscribe:** Subscribes to the specified criteria group.
Info icon	Displays the Subscription Info Page.

A.6.12 Unsubscribe Page

You can use the Unsubscribe page to cancel the subscription to a content item or group.



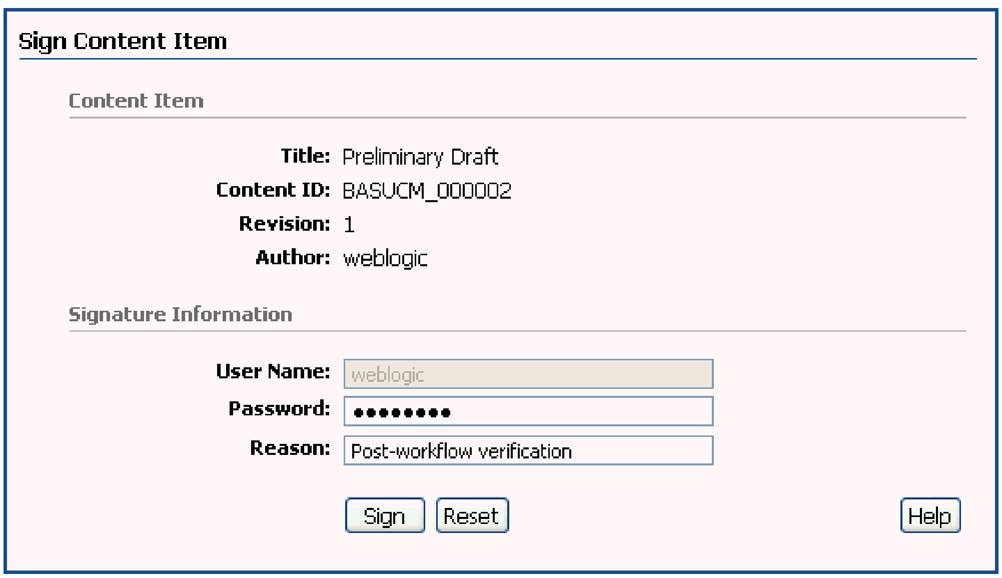
To access this page, select **Unsubscribe** from the **Content Actions** menu on the Content Information Page.

Element	Description
Subscriptions	Lists the criteria of the group to which the item belongs.
Actions menu	**Subscription Info:** Displays the Subscription Info Page. **Subscribe:** Unsubscribes from the specified criteria group.
Info icon	Displays the Subscription Info Page.

A.6.13 Sign Content Item Page

Use the Sign Content Item page to sign a content item with an electronic signature that uniquely identifies the contents of the file at a particular revision and associates the revision with your user name and password. To sign a content item, select the content item revision on the Content Information Page and choose **Sign Content** from the **Content Actions** menu.

Note: You can also sign a content item as part of a workflow approval step. For more information, see Section A.8.10, "Sign Workflow Content Item Page."



Element	Description
Content Item	This section displays basic content information, including the title, content ID, revision, and author.
Signature Information	This section displays fields for providing information about the user who signs the content item and other general information. Your system administrator may also define additional signature metadata fields. This table describes the fields provided by default.
User Name	The user name of the current user. You must sign content items with the credentials of the current user.
Password	The password of the current user. You must provide a valid password to sign a content item. If the password is not valid, the operation is cancelled.

Element	Description
Reason	The reason for signing the content item.
Sign	Click to apply the electronic signature and display the Electronic Signature Confirmation page. Valid signatures for a content item revision are displayed on the Content Information - Signatures Tab.
Reset	Clears any user-supplied values on the page.

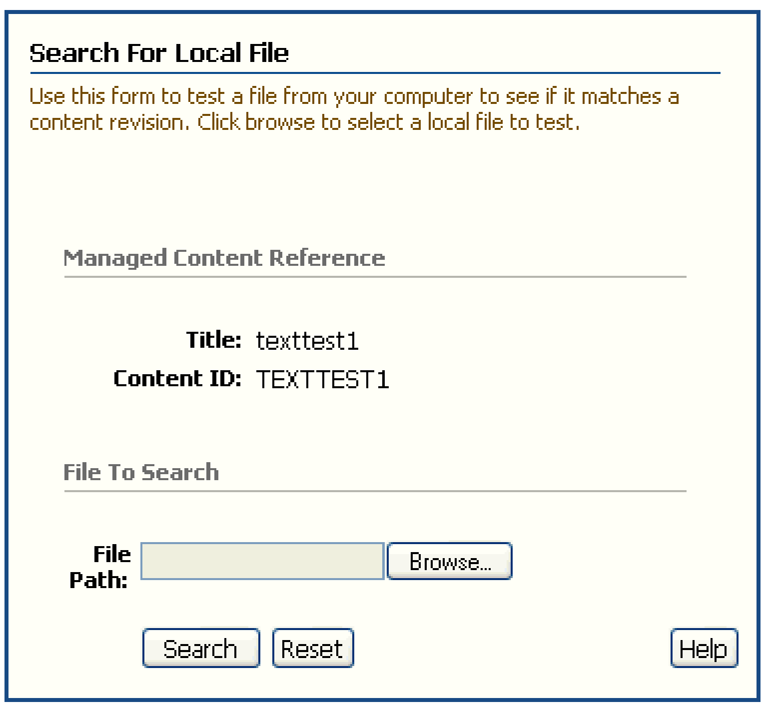
A.6.14 Search for Local File Page

Use the Search For Local File page to select and compare a file in a local file system to signed content item revisions to determine if the contents of the local file match any revisions.

You can validate an external file against the signed revisions of a single content item or against all signed content items in the system. To validate an local file against a single content item, click **Search For Local File In Repository** from the menu area on the Content Information Page for the content item.

To validate an local file against all signed content items in the system, click **Search For Local File In Repository** in the Content Management Tray.

Note: The local file is compared to signed revisions only and only to those to which you have access.



Element	Description
Managed Content Reference	This section displays basic content information when searching for a specific content item and the message **All Signed Items in System** when searching all content items.

Element	Description
File Path	Displays the file path for the selected file. Click **Browse** to select a file.
Browse	Click to select a file from locally accessible file system.
Search	Click to compare the local file against the selected content item revisions and display the signature validation page that indicates whether the file successfully matches any signed content item revisions.
Reset	Clears any user-supplied values on the page.

A.7 Check-In and Check-Out Interface

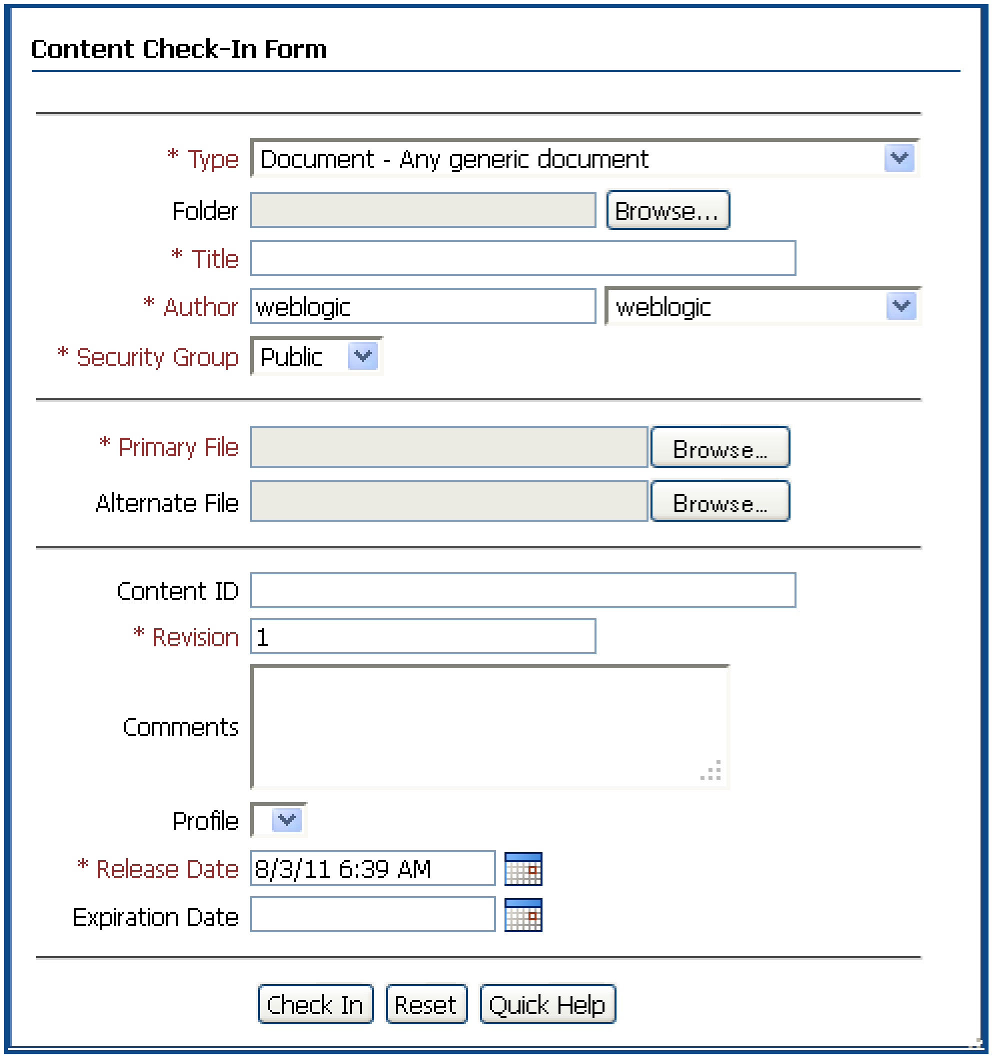
This section describes the pages and options for checking content in and out of the Content Server.

This section covers the following topics:

- Section A.7.1, "Content Check-In Form"
- Section A.7.2, "Dynamic Converter Check-In Fields"
- Section A.7.3, "Check-In Confirmation Page"
- Section A.7.4, "Upload Files Window"
- Section A.7.5, "Checked-Out Content for User Page"
- Section A.7.6, "Check-Out Confirmation Page"
- Section A.7.7, "Checked-Out Content Page"
- Section A.7.8, "Download Files Window"
- Section A.7.9, "Download Results Summary"

A.7.1 Content Check-In Form

As a contributor, you can use the content check-in form to check files into Content Server. Required fields are indicated by an asterisk (*). For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."



To access this page, click **New Check In** on the top menu.

Tip: Using a Content Profiles link in the **My Content Server** tray to check in or search for content can help you define and display the most critical metadata fields necessary for those tasks.

Element	Definition
Type*	The category of the file. You must select from a list of predefined values.
Folder	To include the content item in the Folders hierarchy, click **Browse**, and select a folder from the hierarchy with the Choose a Folder window. You must browse for the folder (you cannot enter the path manually into the Folder field.) This field is available only if Folders (FrameworkFolders component) is enabled.
Title*	A descriptive name identifying the revision. The title you enter must be 249 or fewer characters in length.

Element	Definition
Author*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. You can change this value only if you have administrative permission.
Security Group*	The security group is a set of files with the same access permission.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Primary File*	The path and file name of the native file to check in. ■ Maximum length is 80 characters. ■ The maximum file extension length (after the period) is eight characters. ■ Click **Browse** to navigate to and select the file.
Upload Multiple Files	**Selected:** Click **Browse** to open the Upload Files window and select the files to be included in the primary ZIP file. **Clear:** Click **Browse** to open the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your User Profile Page.
Format*	The application format for the file name entered in the Primary File field. ■ This field appears only if it has been enabled by the system administrator. ■ If the **use default** option is selected, Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, and so on. ■ If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
Alternate File	The path and file name of an alternate, Web-viewable file or a file that can be converted to Web-viewable format. ■ The file extension (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*). ■ Maximum length is 80 characters. ■ The maximum file extension length (after the period) is eight characters. ■ Click **Browse** to navigate to and select the file.
Upload Multiple Files	**Selected:** Click **Browse** to open the Upload Files window and select the files to be included in the alternate ZIP file. **Clear:** Click **Browse** to open the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your User Profile Page.

<table>
<tr><th>Element</th><th>Definition</th></tr>
<tr><td>Format</td><td>The application format for the file name entered in the Alternate File field.
This field appears only if it has been enabled by the system administrator.
If the use default option is selected, Content Server converts the file format based on its file name extension. For example, test.doc is a Word file, test.xls is an Excel file, and so on.
If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.</td></tr>
<tr><td>Content ID</td><td>The unique identifier for the content item. Duplicate names are not allowed. Maximum length is 30 characters. The following are not acceptable: spaces, tabs, line feeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ | If a content ID is filled in or if this field is not displayed, the system is set up to generate content IDs automatically.
If your content server uses an Oracle database, all content IDs are automatically converted to uppercase letters.</td></tr>
<tr><td>Revision*</td><td>The revision increments automatically with each check-in of the content item, so generally, you should not change this value.</td></tr>
<tr><td>Comments</td><td>Additional notes about the file.
Maximum length is 255 characters.</td></tr>
<tr><td>Profile</td><td>Select a profile to associate with the content item. The selected profile is used by default when you display or change metadata information for the content item. Profiles are available only if provided by your administrator.</td></tr>
<tr><td>Release Date*</td><td>The date and time that the revision is available for viewing in Content Server.
Defaults to the date and time the file is checked in.
If another date is entered, the revision remains in Done status until the specified date. For details, refer to Section 4.1.2, "Revision Status."
The date is required; the time is optional.</td></tr>
<tr><td>Expiration Date</td><td>The date and time that the content item is no longer available for viewing in Content Server.
Upon expiration, the revision is not deleted, but only an administrator cam access it.
If a value is entered, the date is required; the time is optional.
By default, all revisions of the content item expire when the current revision expires.</td></tr>
<tr><td>Custom fields</td><td>Any custom metadata fields for your system are displayed on this page.</td></tr>
</table>

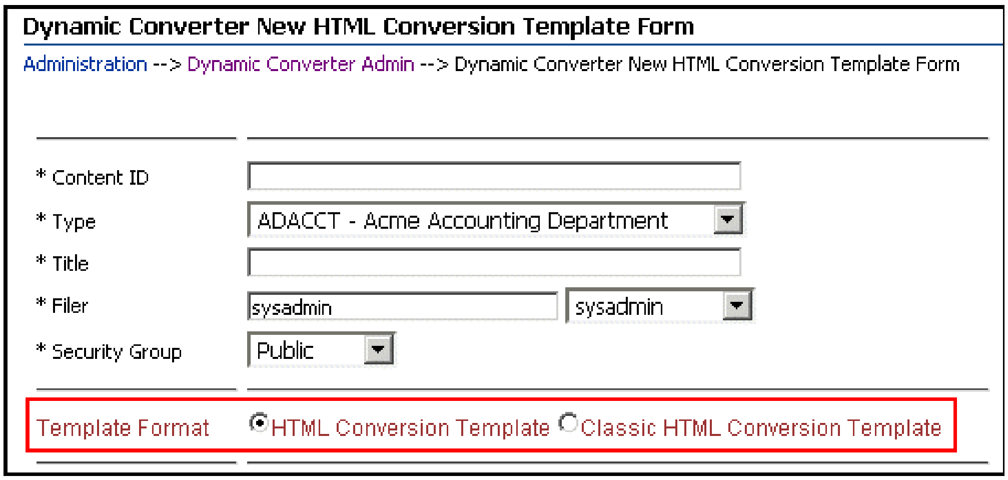
* Required metadata fields

A.7.2 Dynamic Converter Check-In Fields

When the Dynamic Converter option is enabled, there are additional metadata fields that are displayed for new and existing content items. For more detailed information about the Dynamic Converter product, refer to the applicable administration and template editor guides.

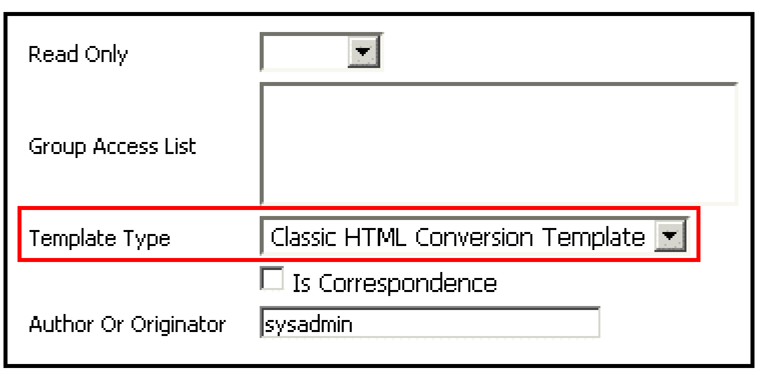
When you check in a new form, the Template Format metadata field is included on the Content Check-In Form. The available options are:

- **Classic HTML Conversion Template:** the template editor from the earlier version of Dynamic Converter
- **HTML Conversion Template:** the current template editor



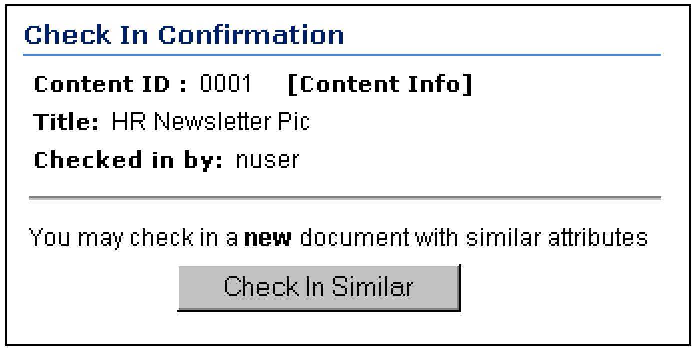
When you check in an existing template, the Template Type field is included. The available options are:

- Classic HTML Conversion Template
- Classic HTML Conversion Layout
- Script Template



A.7.3 Check-In Confirmation Page

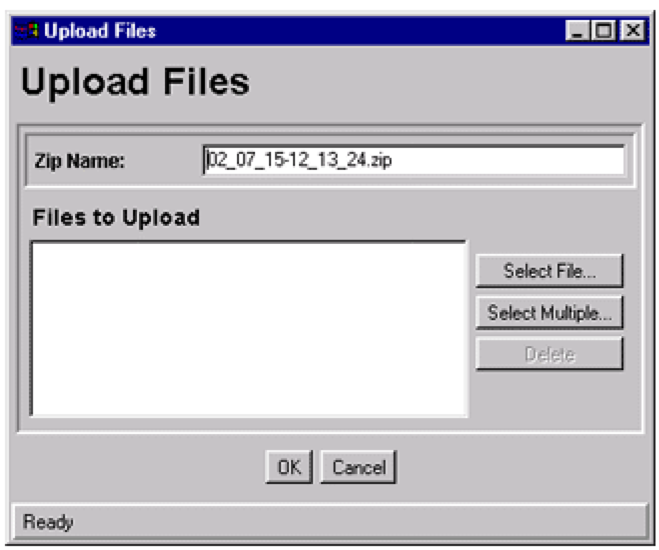
The check-in confirmation page opens after you have checked in a content item successfully.



Element	Description
Content ID	The unique content ID that you entered during check-in or that was generated automatically by the system.
Content Info	Displays the Content Information Page for the content item.
Title	The title of the content item that you checked in.
Checked in by	The login you used to check in the file.
Check In Similar	Displays the Content Check-In Form with metadata fields filled in to match the checked in content item.

A.7.4 Upload Files Window

You can use the Upload Files window to create a ZIP file as the primary or alternate file that is checked in to Content Server.



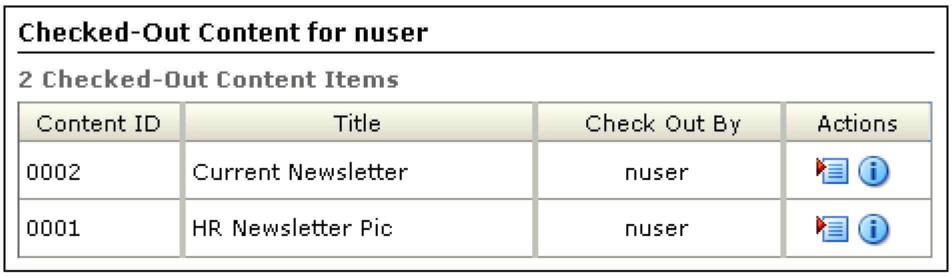
To access this window, select an **Upload Multiple Files** check box on the Content Check-In Form, and click **Browse**.

Element	Description
Zip Name	The name of the ZIP file that is checked in to the Content Server repository.
Files to Upload	Lists the files that are included in the ZIP file.

Element	Description
Select File	Opens the Select File Window that you can use to select individual files.
Select Multiple	Opens the Select Files Window that you can use to select multiple files from the same directory.
Delete	Deletes the selected files from the **Files to Upload** list.

A.7.5 Checked-Out Content for User Page

You can use the Checked-Out Content for User page to identify which files are checked out by the current user.

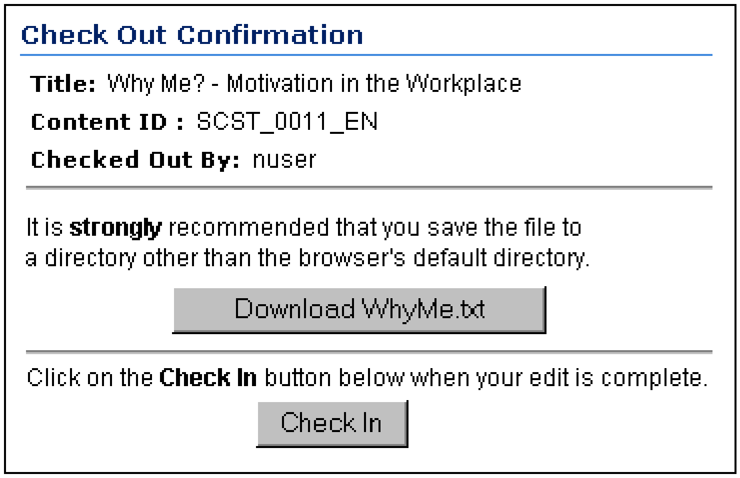


To access this page, click **My Checked-Out Content** in the **My Content Server** tray.

Element	Description
Content ID	Click the Content ID link to display the Web-viewable file.
Title	Displays the title of the content item.
Checked Out By	Displays the user name of the person who has checked out the content item.
Actions menu	Displays a contextual menu allowing you to display the Content Information Page, check in the content item, or undo the check-out of the content item, depending on your access rights.
Info icon	Displays the Content Information Page for the content item.

A.7.6 Check-Out Confirmation Page

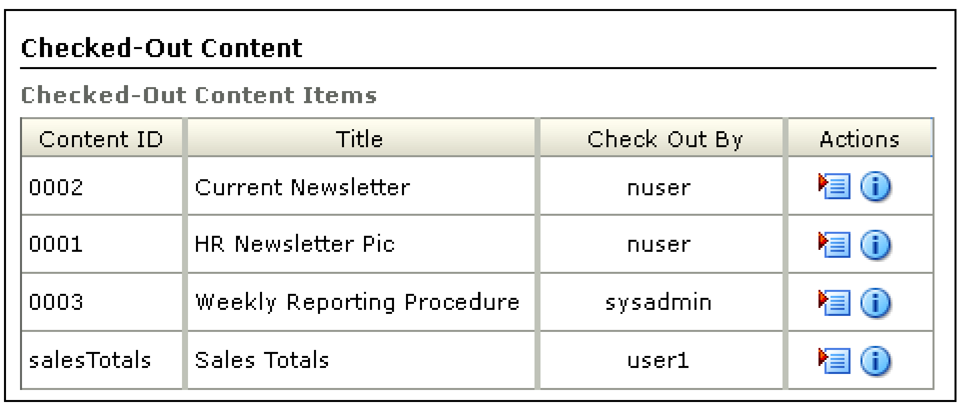
The Check-Out Confirmation page opens after you have checked out a single content item successfully.



Element	Description
Title	The title of the content item that you checked out.
Content ID	The content ID of the file that you checked out.
Checked Out By	The login you used to check out the file.
Download *`native file`*	Enables you to open or save a copy of the native file.
Check In	Displays the Checked-Out Content Page.

A.7.7 Checked-Out Content Page

You can use the checked-out content page to identify which files are checked out.



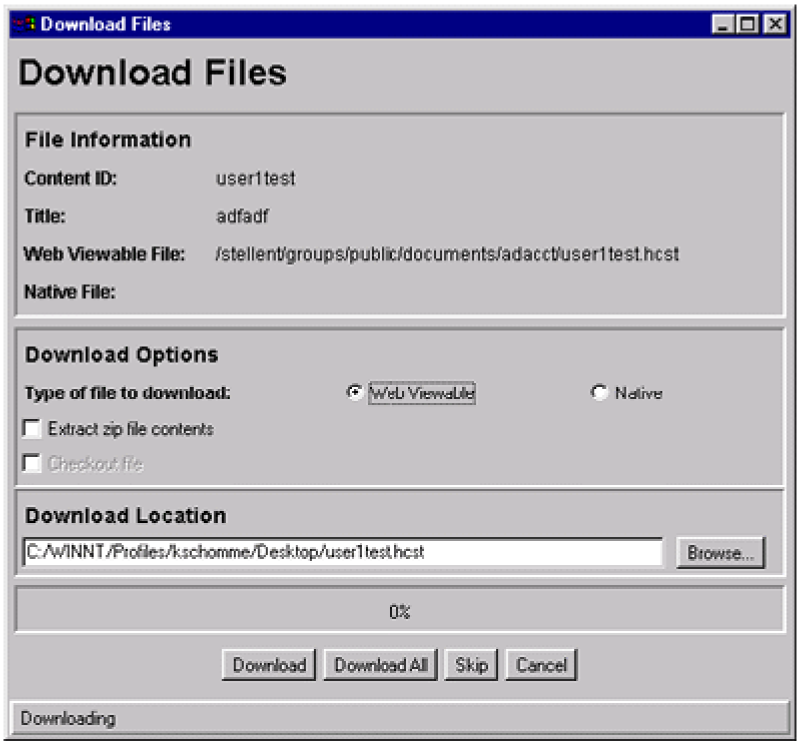
To access this page, click **Checked Out Content** on the Content Management tray.

Element	Description
Content ID	Click the Content ID link to display the Web-viewable file.
Title	Displays the title of the content item.
Checked Out By	Displays the user name of the person who has checked out the content item.
Actions menu	Displays a contextual menu allowing you to display the Content Information Page, check in the content item, or undo the check-out of the content item, depending on your access rights.

Element	Description
Info icon	Displays the Content Information Page for the content item.

A.7.8 Download Files Window

You can use the Download Files window to specify download options and the target directories for files downloaded from Content Server.



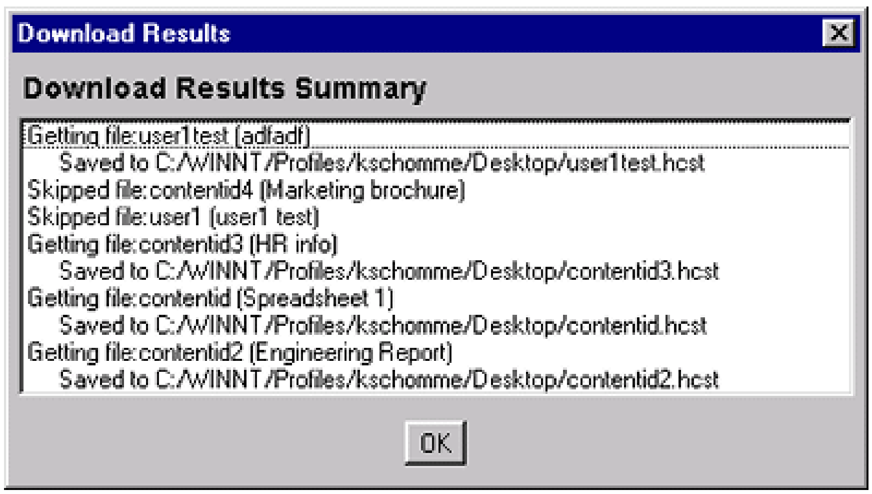
To access this window, click **Download** on the Search Results Page.

Element	Description
Content ID	The content ID of the file.
Title	The descriptive title of the content item.
Web Viewable	The path and file name of the content item's Web-viewable file.
Native	The file name of the content item's native file. This field fills in when the **Native** option is selected.
Type of file to download	**Web Viewable:** Specifies that the Web-viewable file is to be downloaded. **Native:** Specifies that the native file is to be downloaded.
Extract zip file contents	**Selected:** Files in ZIP format are extracted when they are downloaded. **Clear:** Files in ZIP format are downloaded as is.
Check out file	**Selected:** Content items are checked out and downloaded. **Clear:** Content items are downloaded but not be checked out. This check box is available only when the **Native** option is selected.

Element	Description
Download Location	The directory and file name where the current file is copied. Click **Browse** to navigate to and select the directory.
Progress bar	Shows the progress of the download as a percentage.
Download	Downloads the current file to the specified directory.
Download All	Downloads all files that have not been skipped to the specified directory. This button is not displayed if only one file was selected on the search results page.
Skip	Excludes the current file from the download. This button is not displayed if only one file was selected on the search results page.

A.7.9 Download Results Summary

The download results summary displays a log of the downloaded files.



This window opens when the download process is complete.

A.8 Workflow Interface

This section describes the pages and options for processing workflows.

This section covers the following topics:

- Section A.8.1, "Workflow Started Notification"
- Section A.8.2, "Workflow Review Notification Message"
- Section A.8.3, "Workflow Content Items Page"
- Section A.8.4, "Reject Content Item Page"
- Section A.8.5, "Workflow Content Item Reject Notification"
- Section A.8.6, "Active Workflows Page"
- Section A.8.7, "Workflow in Queue Page"
- Section A.8.8, "Workflow Info For Item Page"
- Section A.8.9, "Workflow Review Page"

- Section A.8.10, "Sign Workflow Content Item Page"

A.8.1 Workflow Started Notification

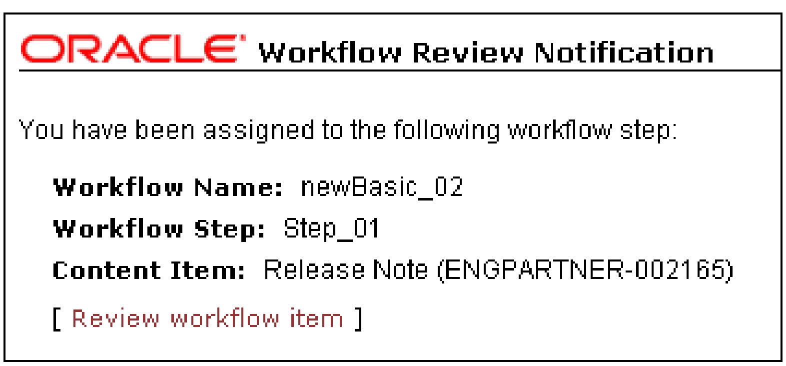
A workflow started notification message is e-mailed to you when you are assigned to check in a new file for a basic workflow.

This is an automated message that you can use to identify the file to check in and other workflow information.

Element	Description
Workflow Name	Identifies the workflow.
Started By	Opens an e-mail to the person who initiated the workflow.
Message	Displays a message from the person who initiated the workflow.
Review workflow content	Opens the Workflow Content Items Page.

A.8.2 Workflow Review Notification Message

A workflow review notification message is e-mailed to you when you are assigned to review a revision in a workflow.

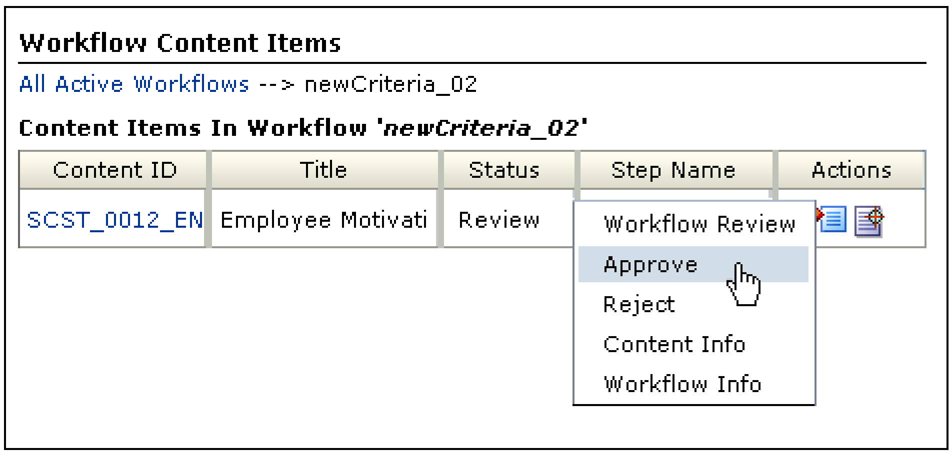


It is an automated message that you can use to identify some workflow characteristics.

Element	Description
Workflow Name	Identifies the workflow.
Workflow Step	Identifies the current step in the workflow.
Content Item	Identifies the content item or items in the workflow.
Review workflow item	Opens the Workflow Review Page.

A.8.3 Workflow Content Items Page

You can use the Workflow Content Items page to identify which action to perform in the workflow.



To access this page, click the **Review Workflow Content** link on a Workflow Started Notification or open the Content Management tray, click **Active Workflows**, and then the workflow name on the Active Workflows Page.

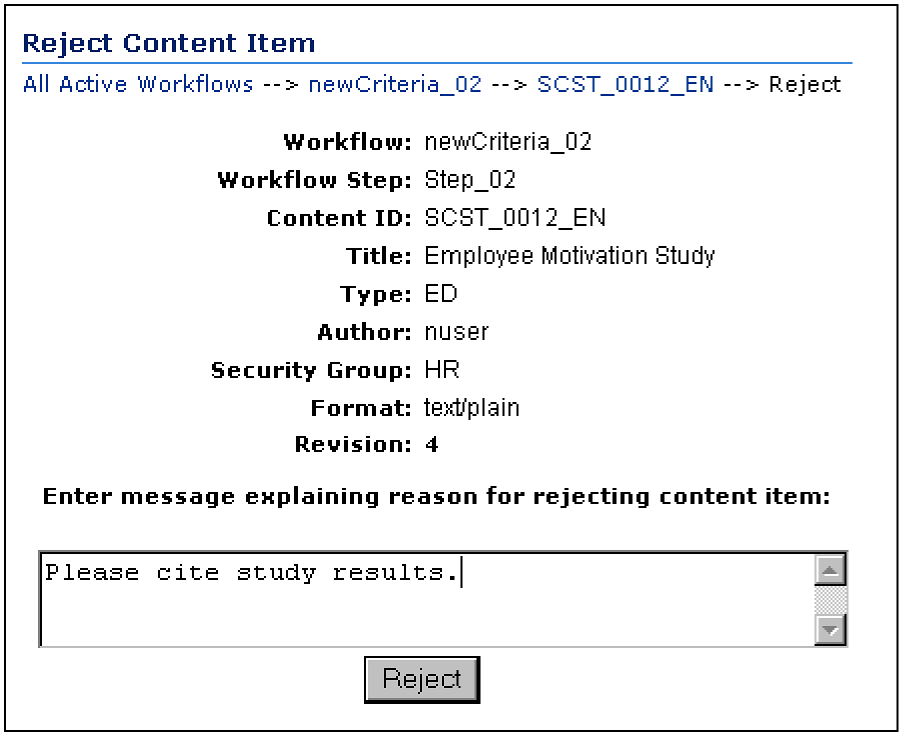
Element	Description
Locator links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Click a link to display the associated page.
Content ID	Click the content ID to display the Web-viewable file.
Title	The title of the content.
Status	The status of the revision.
Step Name	The name of the current workflow step.

Element	Description
Actions menu	Displays the actions (if any) that you can take on the content item: **Workflow Review:** Displays the Workflow Review Page. **Approve:** Approves the revision. **Reject:** Rejects the revision and displays the Reject Content Item Page. **Content Info:** Displays the Content Information Page for the revision. **Workflow Info:** Displays the Workflow Info For Item Page for the revision. **Sign and Approve:** Opens the Sign Workflow Content Item Page, which enables you to provide an electronic signature for the selected revision.
Info icon	Displays the Workflow Review Page for the content item.

Note: Content security can affect the *Workflow Content Items* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is not displayed on the Workflow Content Items page. It is displayed on the Workflow in Queue Page, but without providing access to the content or content information. This view ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

A.8.4 Reject Content Item Page

You can use the Reject Content Item page to explain why you are rejecting a workflow revision.

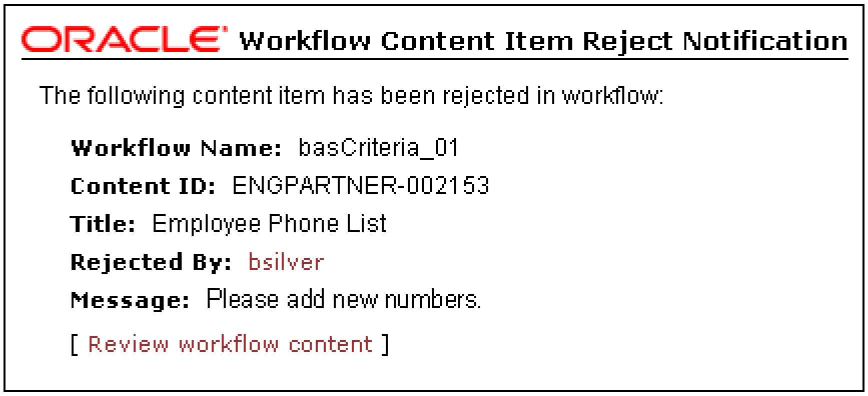


This page opens automatically when you reject a workflow item.

Element	Description
Locator links	Active links below the page heading that provide a graphical representation of where the page is in the navigation hierarchy. Click a link to display the associated page.
Workflow	The name of the current workflow.
Workflow Step	The name of the current workflow step.
Content ID	The content ID of the content item.
Title	The title of the revision.
Type	The value associated with the **Type** metadata field.
Author	The login associated with the user who checked in the file.
Security Group	The security group associated with the content item.
Format	The formats corresponding to the file.
Revision	The current revision of the content item.
Message	Enables you to enter an explanation for why you are rejecting the revision. Include what must be done to ensure that the revision is approved in the future.
Reject	Sends a Workflow Content Item Reject Notification to the previous contributor in the workflow.

A.8.5 Workflow Content Item Reject Notification

When you reject a revision and fill out the Reject Content Item Page, this e-mail message is automatically sent to users assigned to the previous contribution step in the workflow.

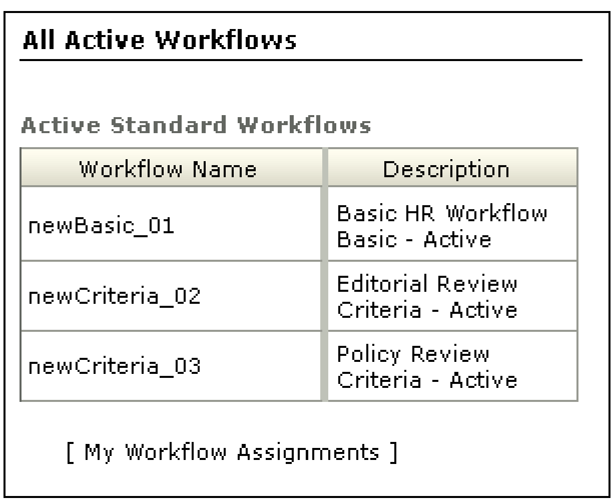


The workflow content item reject notification message identifies who rejected the revision and why it was rejected.

Element	Description
Workflow Name	The name of the workflow.
Content ID	The content ID of the rejected item.
Title	The title of the rejected item.
Rejected By	The user name of the person rejecting the item. Click to send an e-mail to the person.
Message	The message sent by the person rejecting the item.
Review workflow content	Opens the Workflow Content Items Page.

A.8.6 Active Workflows Page

You can use the Active Workflows page to view a list of all active workflows in the system.



To access this page, click **Active Workflows** on the Content Management tray.

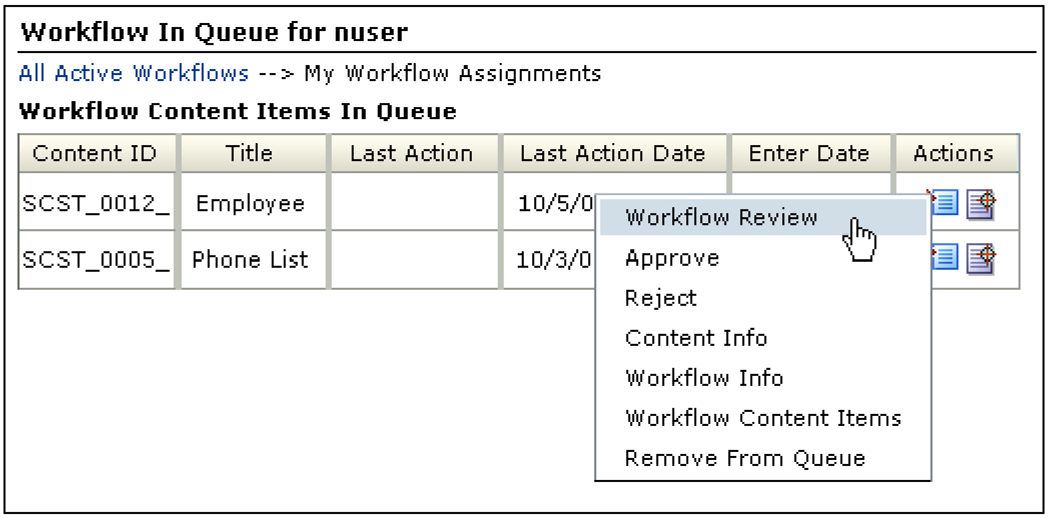
Element	Description
Workflow Name	The names of the active workflows in the corresponding security group. Click a link to open the Workflow Content Items Page.

Element	Description
Description	A description of the workflow
My Workflow Assignments	Displays the Workflow in Queue Page.

Note: Content security can affect the *Workflow Content Items* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is not displayed on the Workflow Content Items page. It is displayed on the Workflow in Queue page, but without providing access to the content or content information. This view ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

A.8.7 Workflow in Queue Page

To access this page, click **My Workflow Assignments** in the **My Content Server** tray.



You can use the Workflow in Queue page to view a list of all content items that you must review.

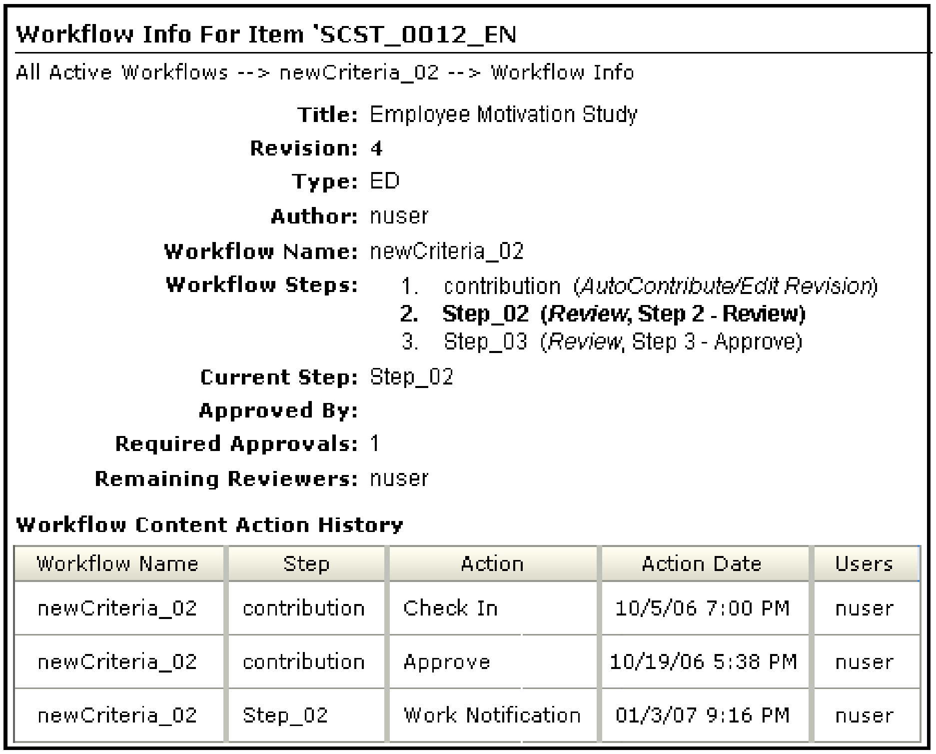
Element	Description
Locator links	Displays a hierarchical navigation structure within Content Server. Located just below the page heading.
Content ID	Displays the content ID and the title of each workflow item. Click the content ID link to open the Web-viewable file.
Title	The title of the workflow.
Enter Date	The date and time that the content item entered the current step.

Element	Description
Actions menu	Displays the actions (if any) that you can take on the content item: **Workflow Review:** Displays the Workflow Review Page. **Approve:** Approves the revision. **Reject:** Rejects the revision and displays the Reject Content Item Page. **Content Info:** Displays the Content Information Page for the revision. **Workflow Info:** Displays the Workflow Info For Item Page for the revision. **Workflow Content Items:** Displays the Workflow Content Items Page for the revision. **Remove from Queue:** Removes the content item from the Workflow in Queue page. (The content item is not deleted from the workflow.)
Info icon	Displays the Workflow Review Page.

Note: Content security can affect access to content on the *Workflow in Queue* page. For example, if 2 content items are included in one workflow to which you are assigned, but one item belongs to a security account to which you do not have access, that item is displayed on the *Workflow in Queue* page, but without providing access to the content or content information. This view ensures that a workflow to which you are assigned does not get held up because you are unaware of your responsibility.

A.8.8 Workflow Info For Item Page

You can use the Workflow Info For Item page to identify where a revision is in the current workflow and to view the workflow history.



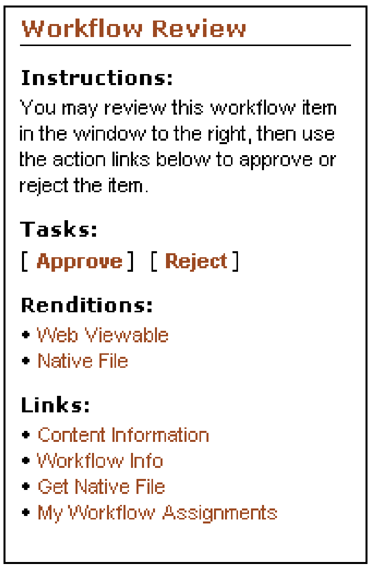
To access this page, select **Workflow Info** from the contextual menu in the **Actions** column on the Workflow Content Items Page or the Workflow in Queue Page, or click **Workflow Info** on the Workflow Review Page.

Element	Description
Locator links	Displays a hierarchical navigation structure within Content Server. Located just below the page heading.
Title	The title of the content item.
Revision	The current revision of the content item.
Type	The value associated with the Type metadata field.
Author	The login associated with the user who checked in the file.
Workflow Name	The name of the current workflow.
Workflow Steps	Lists all of the workflow steps. The current workflow step is in boldface type. The type of workflow step is shown in parentheses.
Current Step	The current workflow step.
Approved By	Lists the logins of the users who have approved the revision at the current workflow step.
Required Approvals	Shows how many approvals are required at the current workflow step.
Remaining Reviewers	Lists the users who have yet to review the revision for the current step.
Current Step's Additional Exit Condition	Lists additional conditions beyond required approvals that must be met for the workflow step to be completed.
Workflow Content Action History	Lists the actions that have been performed on the revision during the current workflow process.

Element	Description
Workflow Name	The name of the workflow or sub-workflow.
Step	The name of the workflow step.
Action	The action that was performed on the revision.
Action Date	The date and time that the action was performed.
Users	The users that performed the action.

A.8.9 Workflow Review Page

The Workflow Review page offers several options for viewing and taking action on content in a workflow to which you have a responsibility.



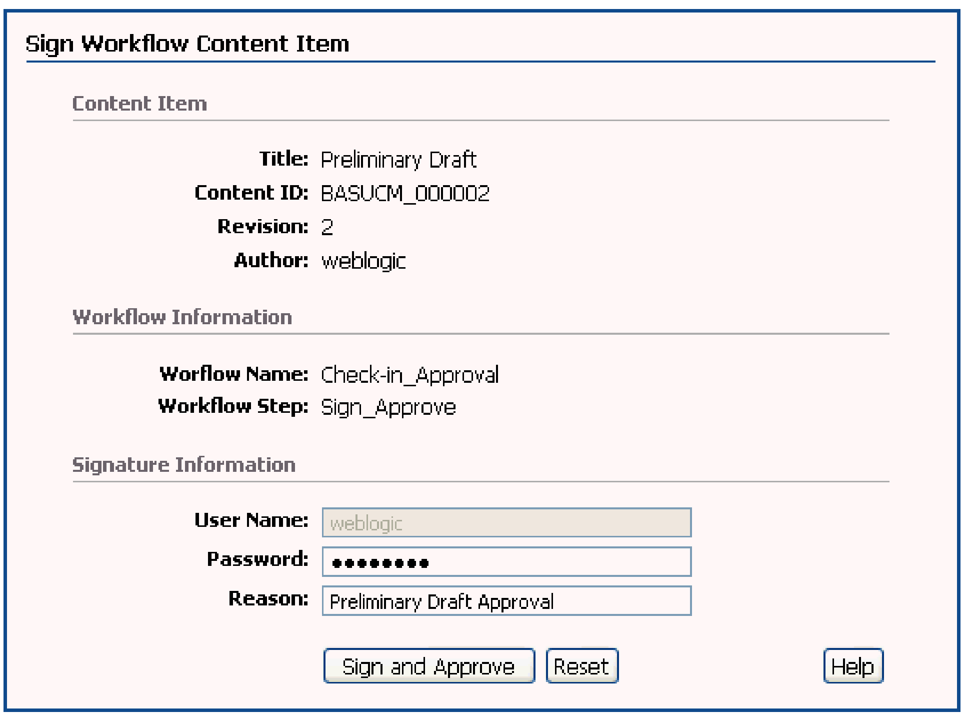
To access this page, click **Review Workflow Item** on the Workflow Review Notification Message or select **Workflow Review** from the contextual menus in the **Actions** column on the Workflow Content Items Page or the Workflow in Queue Page.

Element	Description
Instructions field	Displays instructions on how to proceed with the workflow.
Tasks links	Links to specific tasks you can perform in the workflow. **Approve:** Approves the revision. **Reject:** Rejects the revision and displays the Reject Content Item Page. **Check Out:** Checks out a file and displays the Check-In Confirmation Page. This link is displayed only if the current step is a reviewer/contributor step.

Element	Description
Renditions	Links to specific tasks you can perform in the workflow. **Web Viewable:** Opens a version of the item in a format viewable in your browser, provided your system administrator has configured Content Server to convert the item. **Native File:** Opens the item in your browser using the native application.
Links	Links to information relating to the item or workflow. **Content Info:** Displays the Content Information Page for the revision. **Workflow Info:** Displays the Workflow Info For Item Page for the revision. **Get Native File:** Prompts for you to open the item in its native application, or save a copy of the item in its native format. **My Workflow Assignments:** Displays the Workflow in Queue Page.

A.8.10 Sign Workflow Content Item Page

Use the Sign Workflow Content Item page to sign and approve a content item with an electronic signature that uniquely identifies the contents of the file at a particular revision and associates the revision with your user name and password. To sign and approve a content item in workflow, choose **Sign and Approve** from the **Content Actions** menu on the Workflow Content Items Page.



Element	Description
Content Item	This section displays basic content information, including the title, content ID, revision, and author.

Element	Description
Workflow Information	This section displays the name of the current workflow and step.
Signature Information	This section displays fields for providing information about the user who signs the content item and other general information. Your system administrator may also define additional signature metadata fields. This table describes the fields provided by default.
User Name	The user name of the current user. You must sign content items with the credentials of the current user.
Password	The password of the current user. You must provide a valid password to sign a content item. If the password is not valid, the operation is cancelled and the workflow step remains unapproved.
Reason	The reason for signing the content item.
Sign and Approve	Click to apply the electronic signature and display the Electronic Signature Confirmation page. Valid signatures for a content item revision are displayed on the Content Information - Signatures Tab.
Reset	Clears any user-supplied values on the page.

A.9 Contribution Folders Interface

This section describes the windows and options for working with Contribution Folders.

This section covers the following topics:

- Section A.9.1, "Contribution Folders Link"
- Section A.9.2, "My Folder Configuration Link"
- Section A.9.3, "User Profile Page"
- Section A.9.4, "Folder Configuration Page"
- Section A.9.5, "Default Information Field Configuration Page"
- Section A.9.6, "Revision Information Field Configuration Page"
- Section A.9.7, "Exploring Contribution Folders"
- Section A.9.8, "Trash Exploring Page"
- Section A.9.9, "Browsing Window"
- Section A.9.10, "Hierarchical Folder Information Page"
- Section A.9.11, "Hierarchy Folder Configuration Page"

A.9.1 Contribution Folders Link

When Contribution Folders (Folders_g component) is enabled, a new **Contribution Folders** link appears in the Browse Content tray.

Click this link to open the top-level Exploring Contribution Folders.

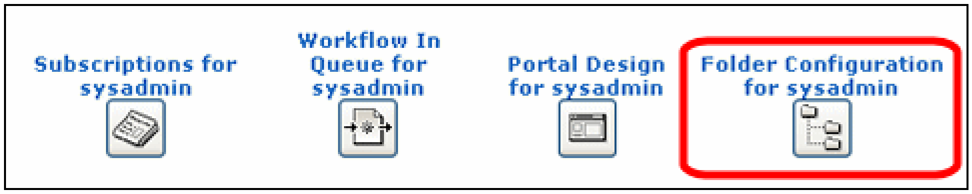
Click the plus symbol to display links to the Exploring Contribution Folders for the top-level folders in the hierarchy.

A.9.2 My Folder Configuration Link

When Contribution Folders (Folders_g component) is enabled, a **My Folder Configuration** link appears in the My Content Server tray. Click this link to display links to the Default Information Field Configuration Page and Revision Information Field Configuration Page.Click this link to open the Folder Configuration Page.

A.9.3 User Profile Page

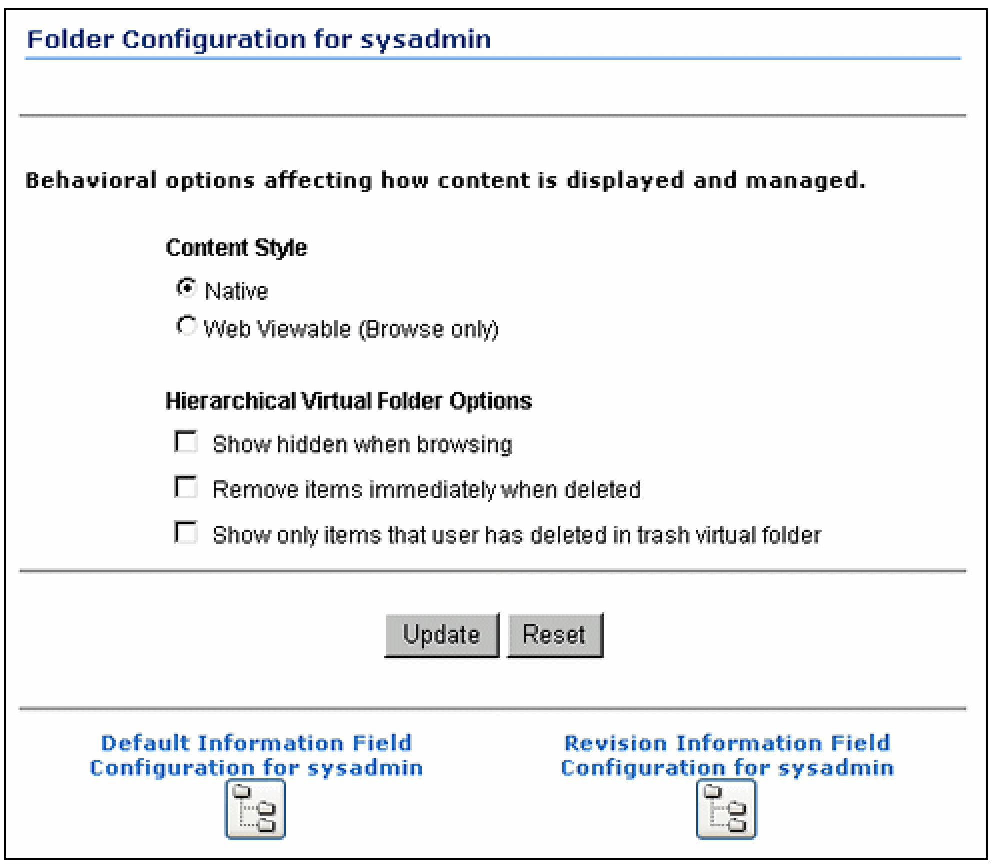
When Contribution Folders (Folders_g component) is enabled, a **Folder Configuration for *user*** button appears on the User Profile page. Click this button to open the Folder Configuration Page.



A.9.4 Folder Configuration Page

The Folder Configuration page enables the user to configure their contribution folder interface. To access this page, do one of the following:

- Click the My Folder Configuration Link in the My Content Server tray.
- Click **Folder Configuration for *user*** on the User Profile Page.



Element	Description
Content Style	**Native:** The native file is displayed when the user clicks a content item in a folder. **Web Viewable (Browse only):** The Web-viewable file is displayed when the user clicks a content item in a folder. The user cannot perform any folder operations when this option is selected.
Hierarchical Virtual Folder Options	**Show hidden when browsing:** When selected, hidden folders and content items are displayed and identified with a dimmed icon; users can still see and work with hidden items. If not selected, hidden folders and content items do not appear in the folder hierarchy. **Remove items immediately when deleted:** When selected, items are deleted immediately (not moved to the Trash folder). If not selected, deleted items are first moved to the Trash folder. **Show only items that user has deleted in trash virtual folder:** When selected, only items that the current user has deleted are displayed the Trash folder. If not selected, all items in the Trash folder are displayed.
Update	Applies any changes to the system.
Reset	Resets the options to the last saved condition.
Default Information Field Configuration for ***User***	Displays the Default Information Field Configuration Page.
Revision Information Field Configuration for ***user***	Displays the Revision Information Field Configuration Page.

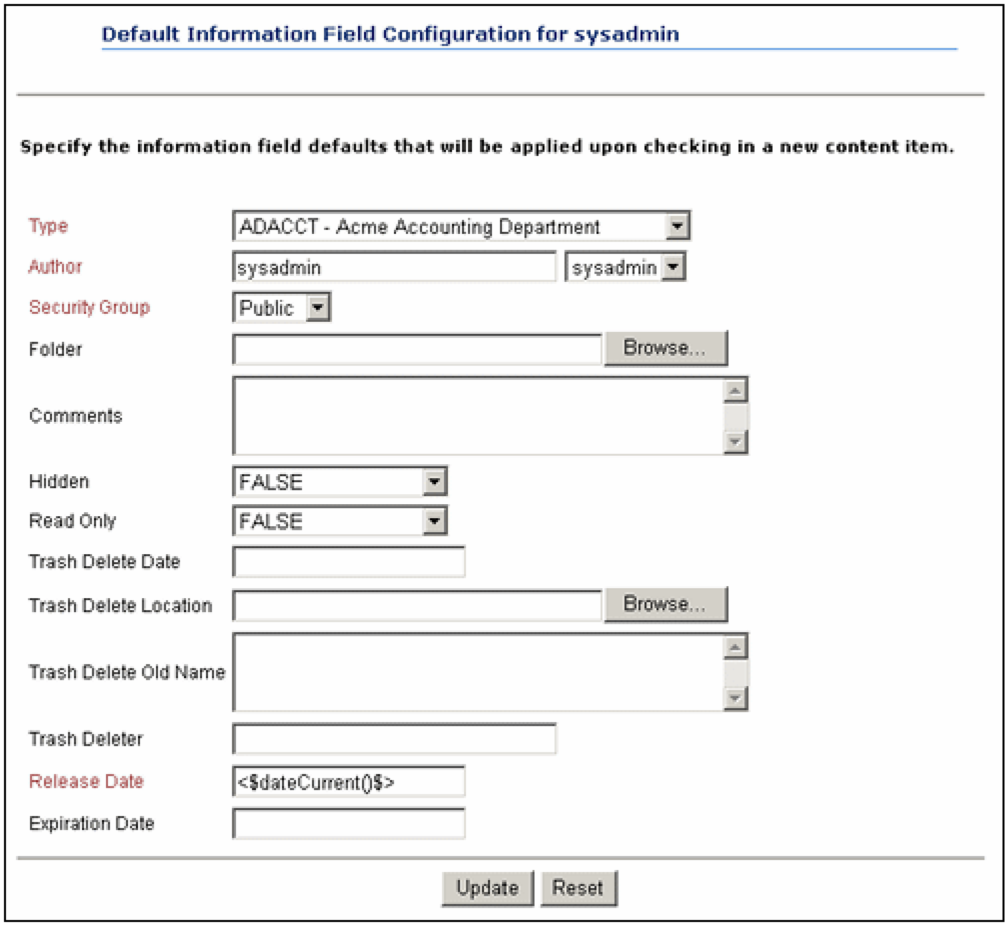
A.9.5 Default Information Field Configuration Page

The Default Information Field Configuration page defines the default metadata values to apply to new content (not subsequent revisions) that the user checks in through a contribution folder. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."

> **Important:** These default settings *only* apply to content that you paste through the WebDAV interface. They do not apply if you add new content to the folder through the Web browser.

To access this page, do one of the following:

- In the My Content Server tray, expand the **Folder Configuration for *user*** link and click **Default Information Field Configuration for *user***.
- Click **Default Information Field Configuration for *user*** on the Folder Configuration Page.



Element	Description
Information	Define the metadata values that are applied to new content (not subsequent revisions) checked in through a contribution folder if values are not defined for the folder. These metadata values are applied only on initial check-in; these settings do not affect revisions to existing content. ■ You can use Idoc Script in any of the information fields. ■ The default Idoc Script in the Release Date field (<$dateCurrent()$>) applies the current release date and time to content item revisions. ■ Although the Release Date field is required, Content Server automatically uses the current date and time if this field1 is left blank. ■ You can specify values for the Trash Delete fields, but they are overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update	Applies changes to the user's profile.
Reset	Resets the fields to the last saved values.

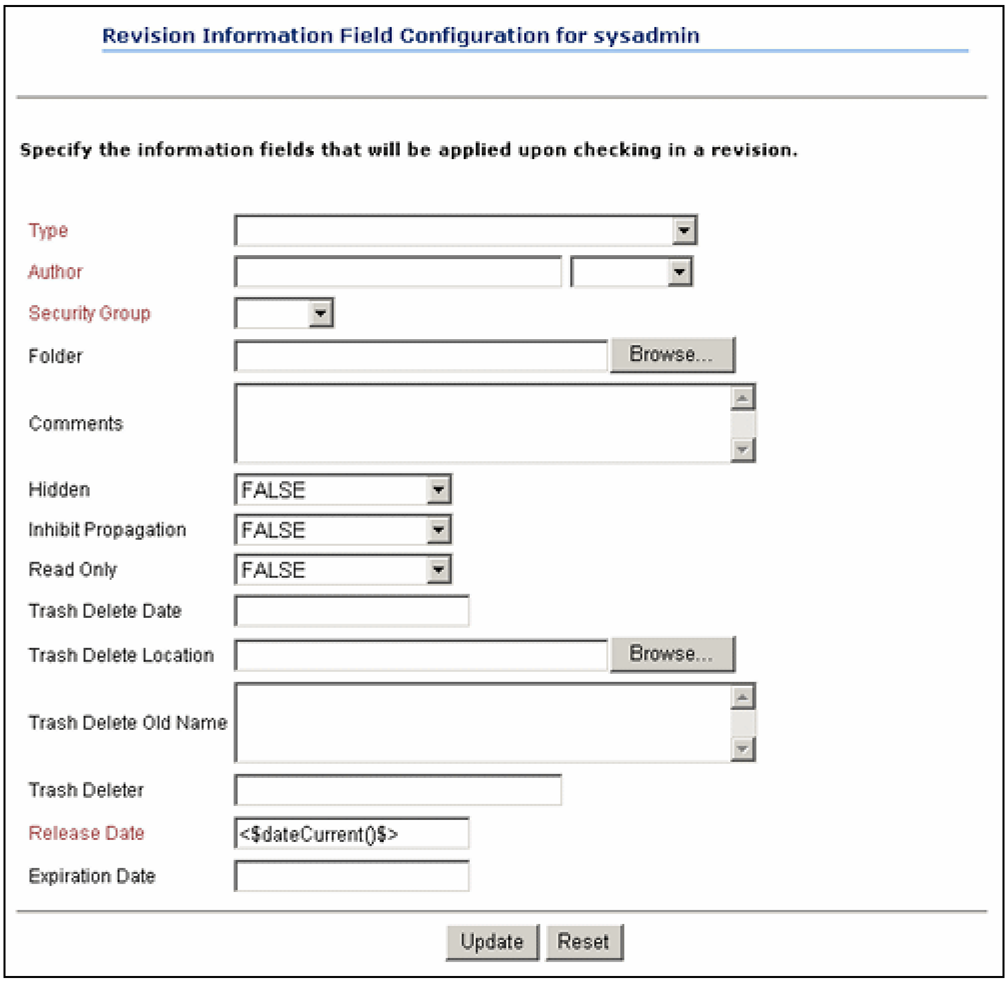
A.9.6 Revision Information Field Configuration Page

The Revision Information Field Configuration page defines the default metadata values to apply to revisions (not new content items) that the user checks in through a contribution folder. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."

Important: These default settings *only* apply to revisions that are pasted through the WebDAV interface. They do not apply if revisions are added to the folder through the Web browser.

To access this page, do one of the following:

- In the My Content Server tray, expand **Folder Configuration for *user*** and click **Revision Information Field Configuration for *user***.
- Click **Revision Information Field Configuration for *user*** on the Folder Configuration Page.



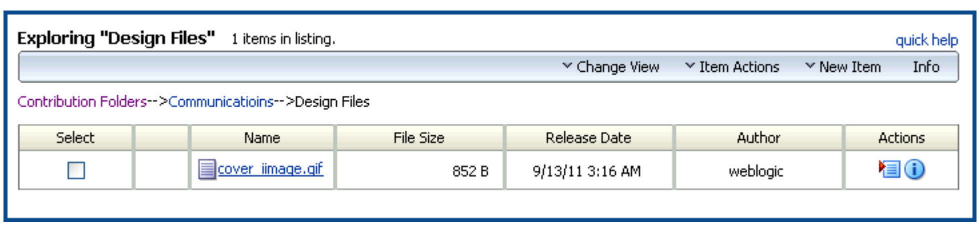
Element	Description
Information	Define the metadata values that are applied to content revisions (not new content items) checked in through a contribution folder if values are not defined for the folder. ■ You can use Idoc Script in any of the information fields. ■ The default Idoc Script in the **Release Date** field (`<$dateCurrent()$>`) applies the current release date and time to content item revisions. ■ Although the **Release Date** field is required, Content Server automatically uses the *previous revision's* release date and time if this field is left blank. ■ You can specify values for the **Trash Delete** fields, but they are overwritten with their current field values at the moment the content item is actually deleted. It is therefore recommended that you leave these fields empty.
Update	Applies changes to the user's profile.
Reset	Resets the fields to the last saved values.

A.9.7 Exploring Contribution Folders

The exploring contribution folders pages are used to work with contribution folders within the hierarchy. To access a folder exploring page, click the folder link under the Contribution Folders Link, or click the folder link on another folder exploring page.

You can customize the look and feel of your exploring pages from your user profile page.

Depending on how the system administrator set up the system, long display lists can be spread over multiple pages. Navigation links are then provided to move between pages.



Element	Description
Folder path	Displays the folder hierarchy for the current folder. Click a link to open the exploring page for that folder.
Change View menu	**Classic View:** Displays the folder contents in the pre-7.0 format. **Thumbnail View:** Displays the folder contents as icons. **Headline View:** Displays the folder contents in a table.

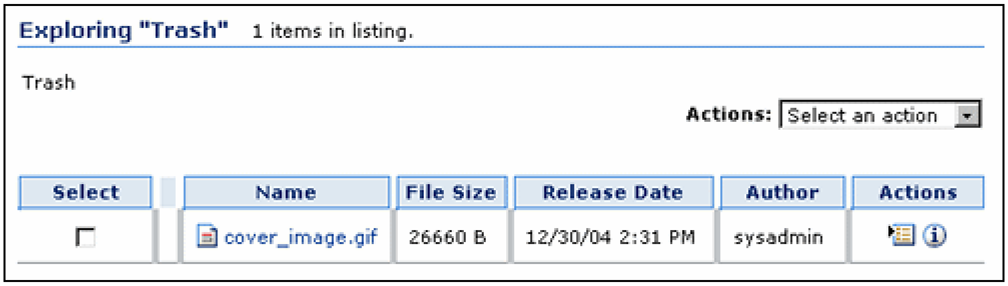
Element	Description
Item Actions menu	**Select All:** Selects all items in the displayed list (that is, all **Select** check boxes are selected). **Unselect All:** Unselects all items in the displayed list (that is, all **Select** check boxes are cleared). **Move:** Opens the Browsing Window that you can use to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function. **Delete:** If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function. **Open Web Folder:** If the Web Folder feature is enabled, displays the current folder as a WebDAV contribution folder in Windows Explorer.
New Item menu	**New Folder (for contributors only):** Opens the Hierarchy Folder Configuration Page you use to create a folder. This option is not available for guest users. **New Content (for contributors only):** Opens the content check-in form, with the current folder's default metadata filled in. This option is not available for guest users.
Info menu	Opens the Hierarchical Folder Information Page.
Select	**Selected:** The folder or content item will be moved or deleted. **Clear:** The folder or content item is not affected by the move or delete operation.
Name	**Folder link:** Displays the exploring page for the folder. **File link:** Displays the Web-viewable file or the File Download dialog, depending on which content style you selected on the Folder Configuration Page.
File Size	Displays the size of the content item.
Release Date	Displays the release date of the content item.
Author	Displays the author of the content item.
Actions menu (folders)	**Folder Information:** Opens the Hierarchical Folder Information Page. **Create Shortcut:** Opens the Browsing Window that you can use to select the target folder for a shortcut link to the current folder. **Move:** Opens the Browsing Window that you can use to select the target folder for the current folder. This action appears only when the system administrator has enabled the Move function. **Delete**: If the Trash Bin function is enabled, this action moves the folder and its contents to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes the current folder, its subfolders, and all revisions of all content items in the folders. This action appears only when the system administrator has enabled the Delete function.

Element	Description
Actions menu (files)	**Content Information**: Opens the content information page. **Check Out**: Checks out content item and displays the check-out confirmation page. **Get Native File**: Prompts you to open the item in its native application, or save a copy of the item in its native format. **Check In Similar**: Displays the content check-in form, with metadata field filled in to match the current content item. **Send link by e-mail**: Opens the default mail client and automatically generates the Web-Viewable link and Native File link paths in the message area. **Create Shortcut**: Opens the Browsing Window that you can use to select the target folder for a shortcut link to the content item. **Move**: Opens the Browsing Window that you can use to select the target folder for the content item. This action appears only when the system administrator has enabled the Move function. **Delete:** If the Trash Bin function is enabled, this action moves the content item to the Trash folder. If the Trash Bin function is not enabled, this action permanently deletes all revisions of the content item. This action appears only when the system administrator has enabled the Delete function. **Add to Folder:** Adds the content item to a selected folder as a new content item. **Add to Folder as Shortcut:** Add the content item to a selected folder as a shortcut.
Info icon	Opens the Hierarchical Folder Information Page for the contribution folder or the content information page for the content item.

A.9.8 Trash Exploring Page

You can use the Trash exploring page to work with folders and content items deleted from contribution folders. To access this page, click **Trash** under the Contribution Folders Link. You can customize the look and feel of your Trash exploring page from your user profile page. The system administrator must have enabled the Trash Bin function for the Trash exploring page to be available.

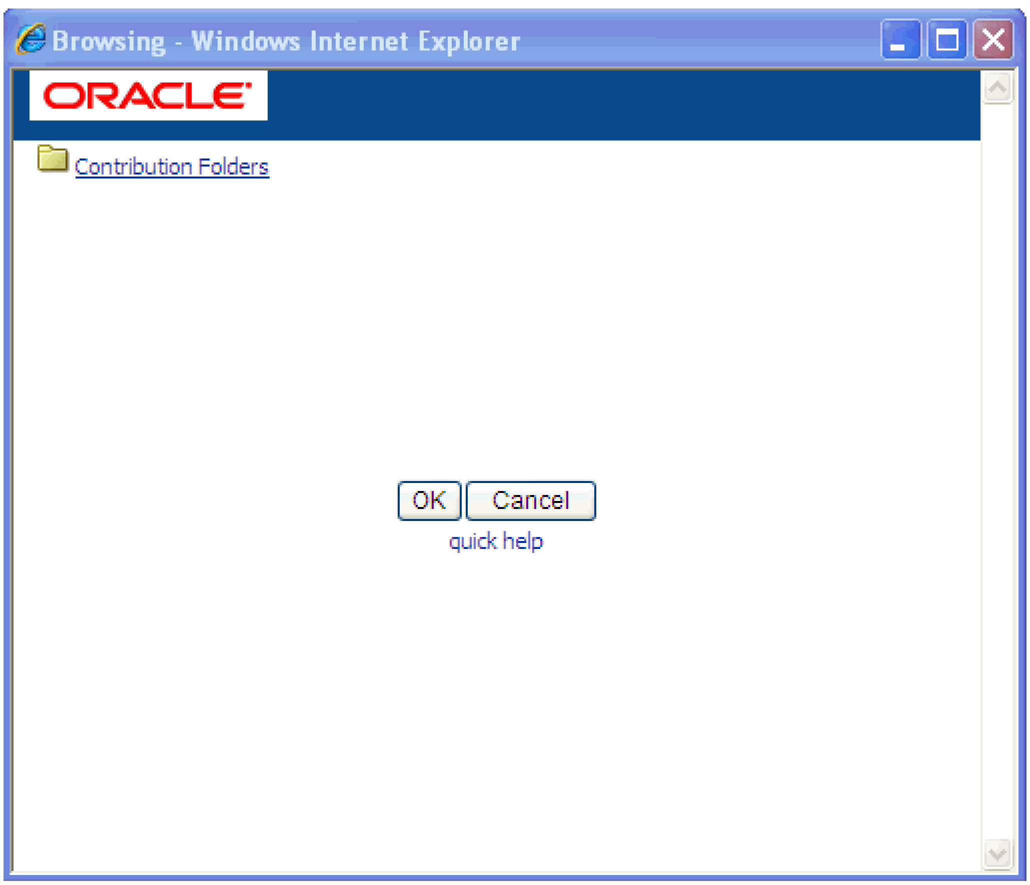
With only one exception, the descriptions applicable list options for each of the features on the Trash Exploring page are identical to those for the Exploring Contribution Folders. The Actions menu for both folders and content items includes a Restore option. Select the Restore option to return the item to its original parent folder. If the original parent folder has been deleted and is still in the Trash folder, the restored item are moved to the original folder. If the original folder has been permanently deleted, you cannot restore the item.



A.9.9 Browsing Window

You can use the Browsing window to select a target folder for moving items, creating shortcuts, and specifying local folders with contribution folders. To access this window, do one of the following:

- Select one or more items and click the Move icon on the Exploring Contribution Folders.
- Select the Shortcut action on a Hierarchical Folder Information Page or Content Information page.
- Click **Browse** on the Local Folders Page (documented in the *Folders and WebDAV Administration Guide*).



Element	Description
Folder	Click a folder to open any subfolders.

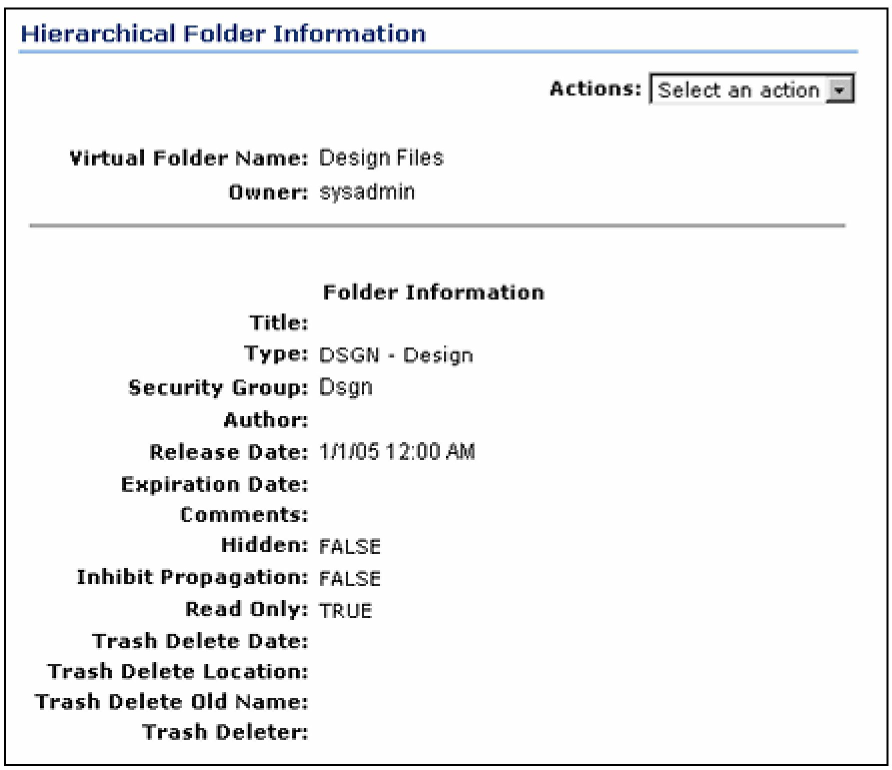
Element	Description
OK	Selects the open folder as the target folder. (Lower-level folders are displayed, but only the open folder is active.)
Cancel	Closes the Browsing window without any selection of a folder.

A.9.10 Hierarchical Folder Information Page

You can use the Hierarchical Folder Information page to view information on a contribution folder. There are two ways to access this page:

- Select **Information** from the Actions menu on any of the Exploring Contribution Folders.
- Select **Folder Information** from the Actions menu for a folder on any of the Exploring Contribution Folders.

The page shows the default metadata for the current contribution folder, and, in the case of deleted folders, information about the delete action. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."



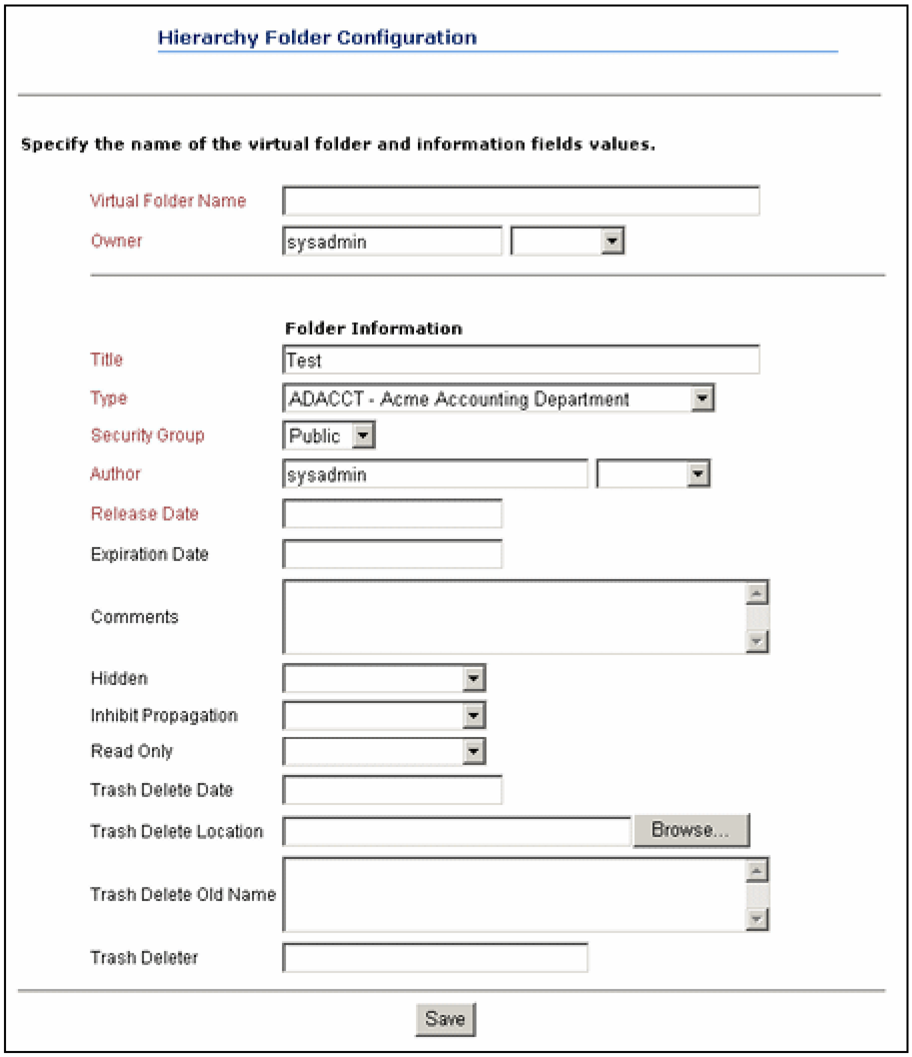
Element	Description
Virtual Folder Name	The name of the contribution folder.
Virtual Folder Owner	The user name of the folder's owner. This user can change the folder metadata and delete the folder.

Element	Description
Folder Information	Display the metadata values for the folder and content items that are checked in through this folder. These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.
Hidden	**True** hides the folder. Users see a dimmed folder icon if they have permission to the folder's security group *and* they have selected the "Show hidden when browsing" check box on the Folder Configuration Page. Otherwise, the folder is not visible in the folder hierarchy. **False** makes the folder visible to all users who have permission to the folder's security group. This field appears only when the system administrator has enabled the Hide/Unhide feature. The Hide/Unhide icons are only visible in the Classic layout. Instead, the Trays and Top menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.
Inhibit Propagation	**True** prevents metadata changes to the folder during metadata propagation from a higher-level folder. **False** includes the folder in metadata propagation from a higher-level folder.
Read Only	**True** prevents renaming, moving, or deleting the folder or content items in that folder. You can still check in content and update folder metadata. **False** makes all folder operations available. This field appears only when the system administrator has enabled the Read Only feature.
Trash Delete Date	For deleted folders, this field shows when the folder was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Delete Location	For deleted folders, this field shows the location of the folder before it was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Delete Old Name	For deleted folders, this field shows the name of the folder before it was deleted. This field appears only when the system administrator has enabled the Trash Bin feature.
Trash Deleter	For deleted folders, this field shows the name of the user who deleted the folder. This field appears only when the system administrator has enabled the Trash Bin feature.
Actions menu	**Update:** Opens the Hierarchy Folder Configuration Page. **Create Shortcut:** Opens the Browsing Window that you can use to select the target folder for a shortcut link to the current folder. **Propagate:** Propagates the folder's default metadata values to uninhibited subfolders and content items.

A.9.11 Hierarchy Folder Configuration Page

You can use the Hierarchy Folder Configuration page to define or modify contribution folders. For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."

- To access the Hierarchy Folder Configuration page to add a folder, select **New Folder** from the Actions menu on any of the Exploring Contribution Folders.
- To access the Hierarchy Folder Configuration page to edit an existing folder, open the Hierarchical Folder Information Page and select **Update** from the Actions menu.



Element	Description
Virtual Folder Name	The name of the contribution folder.
Owner	The user name of the folder's owner. This user can change the folder metadata and delete the folder.

Element	Description
Folder Information	Define the metadata values for the folder and any content items that are checked in through this folder. These metadata values are applied only on initial content check-in; these settings do not affect revisions to existing content.
Hidden	**True** hides the folder. Users see a dimmed folder icon if they have permission to the folder's security group *and* they have selected the "Show hidden when browsing" check box on the Folder Configuration Page. **False** makes the folder visible to all users who have permission to the folder's security group. This field appears only when the system administrator has enabled the Hide/Unhide feature. The Hide/Unhide icons are only visible in the Classic layout. Rather than icons, the Trays and Top Menus layouts use the metadata fields ReadOnly and Hidden on the folder information page.
Inhibit Propagation	**True** prevents metadata changes to the folder during metadata propagation from a higher-level folder. **False** includes the folder in metadata propagation from a higher-level folder.
Read Only	**True** prevents renaming, moving, or deleting the folder or content items in that folder. You can still check in content and update folder metadata. **False** makes all folder operations available. This field appears only when the system administrator has enabled the Read Only feature.
Trash Delete Date Trash Delete Location Trash Delete Old Name Trash Deleter	You can specify values for these fields, but they are overwritten with their current field values at the moment the contribution folder is actually deleted. It is therefore recommended that you leave these fields empty. These fields appear only when the system administrator has enabled the Trash Bin feature.
Save	Saves the new contribution folder. This button appears only when you create a new folder.
Submit Update	Saves the changes to the contribution folder. This button appears only when you modify an existing folder.
Reset	Resets the fields to the last saved definition of the contribution folder. This button appears only when you modify an existing folder.

A.10 Folders Interface

This section covers the following topics:

- Section A.10.1, "Exploring Folders"
- Section A.10.2, "Choose a Destination Window"
- Section A.10.3, "Create Shortcut Window"

- Section A.10.4, "(Folder) Shortcut Information Page"
- Section A.10.5, "Folder Editing Form"
- Section A.10.6, "Folder/File Search Form"
- Section A.10.7, "Editing Default Metadata Values Page"
- Section A.10.8, "Propagate Page"

A.10.1 Exploring Folders

The Browse Content tray includes a **Folders** link. To expand or collapse a particular level in the folder hierarchy, click the plus or minus icon next to the folder name in the Browse Content tray. To view the contents of a folder, click the folder name.

> **Note:** Individual folders are displayed only if you have Read privileges for that folder.

When you open a folder, its contents are displayed in the content area with folders in the top portion and content items in the bottom portion. **Page menus** provide options for adding folders and folder content and for managing metadata for the current folder. **Folder menus** provide options for managing selected items (folders or content items) in the current folder. An Actions menu for individual folder and content items provide options for managing the associated item.

Folders with many content items display their content over multiple pages. You can use the navigation options at the bottom of the folder listing to move between pages or to display all items at one time.

A.10.1.1 Page Actions and Menus

The menus at the top of the folder explorer page provide options for the current folder, including options to add subfolders and content items and to manage metadata for the current folder.

Element	Description
Folder path	Shows the path for the current folder. Click any folder in the path to open that folder. To display the root folder, click the initial "/".
View menu	**All Items:** Shows all content items, regardless of their state. These can include documents that are still in workflow. **Published Items:** Shows only released content items.

Element	Description
Add menu	**New Folder:** Name and create a new folder with the Folder Editing Form. With this form, you can also specify security and other metadata values. **New Query Folder:** Name and create a new query folder with the Folder Editing Form. You can also use this form to specify security and other metadata values. For query folders, you can define the query used to populate the folder and specify sorting criteria for the query results. You can use a pre-defined search profile or define a search with any available search form. **New Retention Query Folder:** Name and create a new query folder with the Folder Editing Form. You can also use this form to specify security, retention rules for the folder contents, and other metadata values. **New Content Item:** Add a new content item to the repository and add a primary link in the current folder with the Content Check-In Form. This form includes metadata values for the new content item including the name of the item in the current folder. **Existing Content Item:** Add a primary link in the current folder to a repository content item you locate with the available search forms.
Edit menu	**Folder Information:** View and update folder metadata with the Folder Editing Form. This option is available only if you have permission to modify the folder metadata. **Metadata Values:** View and update default metadata values and metadata rules for the current folder with the Editing Default Metadata Values Page. This option is not available with query folders. **Propagate:** Propagate selected, specified metadata values to the items in the current folder, including subfolders, with the Propagate Page.
Search menu	**Folders:** Search for a folder in a selected folder with the Folder/File Search Form. **Files:** Search for a file in a selected folder with the Folder/File Search Form.

A.10.1.2 Folder Actions and Menus

Folder menus provide options for managing selected items (folders or content items) in the current folder. A check mark in the check box next to an item selects the item. Actions you choose from the **Actions** menu apply to all selected items.

Element	Description
Select menu	**All:** Select all folders and folder shortcuts (in the top portion of the window) and all content items and content item links (in the bottom portion of the window.) **All Folders:** Select all folders and folder shortcuts. **All Files:** Select all content items and content item links. **None:** Deselect any selected items.

Element	Description
Actions menu	All options in this menu prompt you to verify your choices before initiating the action. **Move:** Specify where to move the selected items with the Choose a Destination Window. **Copy:** Specify where to copy the selected items with the Choose a Destination Window. Items you select to copy remain selected after the copy operation completes until you explicitly reset them or navigate to another folder or view. **Delete:** Remove the selected items from the folders interface. Content items you delete are expired in the content repository. **Remove From Folder:** Remove the selected items from the folder hierarchy, but leave the associated items in the repository. You cannot remove folders or folder shortcuts.
Select check box	Select one or more items to manage. The actions you choose from the folder Actions menu apply to all selected items.

A.10.1.3 Folder Item Actions

The individual subfolders within a folder each provide a list of actions you can perform for that item, such as view or change metadata and copy or delete the folder. To access the Actions menu for a folder or folder shortcut, click the list icon next to the folder name. Some actions are only available with folders, folder shortcuts, or query folders.

Element	Description
View Shortcut Information	View folder shortcut metadata with the (Folder) Shortcut Information Page. This option is available for shortcuts only.
Update Folder Information	View and update folder metadata with the Folder Editing Form.
Create Shortcut	Create and name a shortcut to the current folder and select the folder where the shortcut resides with the Create Shortcut Window. This item is not available for folder shortcuts.
Rename	Specify a new name for the associated folder or shortcut. You can also rename the folder (and change other metadata items) with the Folder Editing Form.
Move	Specify where to move the associated folder and its contents with the Choose a Destination Window.
Copy	Specify where to copy the associated folder and its contents with the Choose a Destination Window.
Delete	Remove the selected items from the folder hierarchy and expire any associated content items in the repository. All shortcuts to deleted folders or content items are also removed from the folders hierarchy.
Add to My Folders	Copy the selected items to your user folder. Your user folder is named with your user name and is located in the folder hierarchy at /Users/<username>/.

Element	Description
Select check box	Select one or more items to manage. The actions you choose from the folder Actions menu apply to all selected items.
Folder Name	Click the folder name to open the exploring page for that folder.

A.10.1.4 Content Item Actions

The individual content items within a folder each provide a list of actions you can perform for that item, such as view or change metadata and copy or delete the item. To access the Actions menu for a content item or shortcut, click the list icon in the Actions column.

Element	Description
Update Content Information	View and update metadata for the associated content item with the Info Update Form.
Create Shortcut	Create and name a link to the current content item and select the folder where the shortcut resides with the Create Shortcut Window. This option is not available for shortcuts.
Rename	Specify a new name for the associated content item. You can also rename the folder (and change other metadata items) with the Folder Editing Form.
Move	Specify where to move the associated content item with the Choose a Destination Window.
Copy	Specify where to copy the associated content item with the Choose a Destination Window.
Delete	Remove the content item and all associated shortcuts from the folders hierarchy and expire the content item in the repository.
Remove From Folder	Remove the associated item from the folder hierarchy, but leave the item in the repository.
Select check box	Select one or more items to manage. The actions you choose from the folder Actions menu apply to all selected items.
Content ID	Click to open the Web-viewable version of the content item if one is available.
File Name	Click to download the native format version of the content item.
Title, Release Date, Author	View basic information for the associated content item. To update this information, select **Update Content Information** from this menu.
Add to My Folders	Copy the item to your user folder. Your user folder is named with your user name and is located in the folder hierarchy at /Users/<username>/
Info icon	Click to view metadata information for the content item with the Content Information Page.

A.10.2 Choose a Destination Window

You can use the Choose a Destination window to select a folder from the folder hierarchy for copy and move operations.

Element	Description
Destination	To choose a destination folder, click **Browse**, and select a folder from the hierarchy. You must browse for the folder (you cannot enter the path manually into the Destination field.)
Browse	Select a folder from the folder hierarchy with the Choose a Folder window. You can expand or collapse individual folders to show any additional folders.
Show Advanced Options/ Hide Advanced Options	Show or hide advanced options for copy and move actions.
Auto propagate destination's metadata to folder	By default, moved items retain the metadata defined for the item and do not inherit metadata values in the new location. If you select this option, moved items inherit the metadata defined by the enclosing folder in the same way that copied items do. This option is available only if enabled by your administrator and applies only to move operations.
Options if same file/folder exists in destination	Specify how to resolve duplicate names when you copy or move folders or files. After the copy or move operation completes, a window lists any conflicts and their resolutions. ■ **Resolve conflicts if file/folder exists:** Folders or files with name conflicts are renamed in the destination with a prefix of "copy of". If more than one copy is created, each subsequent copy is given a numeric increment (1, 2, 3, and so on.) ■ **Override file/folder if exits:** For one or more files, delete the duplicate file in the destination and replace it with the source file. For folders, merge the contents of the source and destination folders. For file conflicts within folders, delete the duplicate file in the destination and replace it with the source file. Deleted files are expired in the repository and removed from the folders hierarchy. Any shortcuts to deleted items are also removed from the folders hierarchy. ■ **Skip copy/moves if file/folder exists:** Skip individual items with folder or file name conflicts, but continue with the remainder of the copy or move operation. Folders with name conflicts are skipped in their entirety, including their contents.

A.10.3 Create Shortcut Window

To create a shortcut to a folder or file, click **Create Shortcut** in the Actions menu associated with the folder or file and then use the Create Shortcut window to select a folder and specify the name of the shortcut.

Element	Description
Folder	The folder you select here is the location where the shortcut is stored. To choose a folder, click **Browse**, and select a folder from the hierarchy. You must browse for the folder (you cannot enter the path manually into the **Folder** field.) This field is required.
Browse	Select a folder from the folder hierarchy with the Choose a Folder window. You can expand or collapse individual folders to show any subfolders.
Shortcut Name	Specify the name of the shortcut. This field is required. To change the name of an existing shortcut, click **Rename** in the Actions menu associated with the shortcut.

A.10.4 (Folder) Shortcut Information Page

You can use the Shortcut Information page to view metadata information for a folder shortcut and its associated folder.

Note: File shortcuts do not provide viewable metadata of their own. When you view or update content information for file shortcuts, you view or update the information for the content item itself.

Element	Description
Shortcut path	Shows the path for the shortcut. Click any folder in the path to open that folder.
Shortcut Metadata	Shows the current metadata values for the shortcut.
Folder path	Shows the path for the folder associated with the shortcut. Click any folder in the path to open that folder.
Folder Metadata	Shows the current metadata values for the associated folder. For more information about folder metadata, see Section A.10.5, "Folder Editing Form."

A.10.5 Folder Editing Form

Folders and query folders have their own basic folder metadata, including security attributes. Query folders provide additional fields for the query associated with the folder. Folders also provide default metadata values for the files they contain.

For more information about setting metadata defaults, see Section A.10.7, "Editing Default Metadata Values Page." For more information about user, group, and role access control list (ACL) fields, see Section A.4, "Access Control Lists (ACL)."

Element	Description
Folder	Shows the path for the current folder or the folder associated with the current shortcut. To change the path for an existing folder, you must move the folder using the Move option. For more information, see Section 8.2.3.4, "Copy or Move Folders and Files."

Element	Description
Folder Name	Specify the name of the folder or shortcut. Use standard naming conventions for Windows when naming files and folders. Do not use special characters such as the forward or backward slash characters or the double quote character.
show advanced options/ hide advanced options	Specify security and other options for the folder.
Owner	Specify the user name of the folder's owner. This user can change the folder metadata and delete the folder.
Security Group	Shows the account to which users must belong to access the content item.
Account	Shows the account to which users must belong to access the content item. This field is available only if accounts are enabled.
Is Collaboration Project	Select to specify that the folder is part of a specified collaboration project. This option is only available if your server is configured for collaboration projects.
Collaboration Project	Select to specify that the folder is part of a specified collaboration project. This option is only available if your server is configured for collaboration projects.
User Access List	Specify the access control list users who have access to the item and the permissions assigned to each user. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add User	Add the selected name to the user access list. New or modified items are shown in red. To remove a name from the list, click the red X next to the name.
Group Access List	Specify the access control list groups who have access to the item and the permissions assigned to each group. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add Group	Add the selected name to the group access list. To remove a name from the list, click the red X next to the name.
Inhibit Propagation	Select to specify that the folder and its content items do not inherit metadata values from the parent folder during propagation operations.

Element	Description
Prompt for Metadata	Select to prompt the user to provide metadata values when adding content items to the folder rather than relying on the folder's default metadata settings. If default values are not provided for all required fields, you are prompted to provide them when you create or check in the content item even if **Prompt for Metadata** is not selected.
show advanced retention options/ hide advanced retention options	Specify retention rules for the contents of the folder. You must be an administrator to specify retention rules. You can apply retention options to retention query folders and to shortcuts to retention query folders only. The retention rule or rules you specify apply to all content items returned by the query for which you have Delete permission. For more information about retention scheduling, see the *Oracle WebCenter Content Application Administrator's Guide for Content Server*.
Number of Revisions to Keep	Specify how many revisions of the content items in the query folder to keep. To remove the retention rule, clear the value or click the Clear Field Value icon to the right of the field.
Keep For	Specify how long to keep the content items in the query folder. Select a unit, such as months, from the menu and specify how many of the selected unit to retain the content If you have the full Oracle WebCenter Content: Records product, the units list includes fiscal units as well as calendar units.
Category	Assign a category to the query folder and use the retention defined for the category to determine how to dispose of the content items. This option is available only with the full Oracle WebCenter Content: Records product.
show query definition options/ hide query definition options	Specify security and other options for the folder.
Enter Search Terms	Specify the text for which to search within content items. This field is available only if full-text search is enabled on your system. ■ Use spaces between terms to allow a result only if all terms are in the content ■ Use quotation marks (") around two or more words for a phrase search ■ Use a comma (,) between terms to allow a result if either term is in the content ■ Use a minus (-) immediately in front of a term to exclude content items ■ Use parentheses to group search terms
show query builder advanced options/ hide query builder advanced options	Optionally specify or modify the existing query statement to create custom queries that are not possible using the standard query builder form.

Element	Description
Modify Query Text	Specify the query associated with the folder. The results of the form search are shown in script form in this field. You can enter the query in script format directly in this field or modify the results of the search built using the form. This field is only available with query folders. For more information about search see Section 3, "Searching for Content Items."
Sort Field	Specify the folder information field used to sort the query results in the folder. This field is only available with query folders.
Sort Order	Specify the sort order (Ascending or Descending) for the query results in the folder. This field is only available with query folders.

A.10.6 Folder/File Search Form

You can use the Folder Search or File Search forms to specify search criteria when searching for folders, files, and shortcuts. You can search for most folder metadata values, including security attributes.

> **Note:** You can restrict your search to a particular folder with the **Folder** field, however you cannot search the folder path itself for text elements. Similarly, for query folders, you cannot search for elements within the query statement associated with the folder.

For each field on the form, you can specify a value and a comparison operator that specifies whether the value matches exactly, is a substring within the actual value, and so on. For more information about search field operators, see Section 3.5.2.3, "Metadata Search Operators for a Database Metadata Search."

Element	Description
Folder Metadata	Use any or all fields to specify search criteria. If you leave a field blank, it effectively matches all values.
Folder Name/File Name	Specify the full or partial name of the folder or file or associated shortcut.
Folder	To restrict the search to a specific folder click **Browse** to open the Choose a Folder window and select the folder. By default, the search is restricted to the folder in which the search was initiated.
Owner	Specify, or select from the associated list, the full or partial user name of the folder or file's owner.
Security Group	Specify, or select from the associated list, the full or partial name of the security group to which users must belong to access the folder or file.
Account	Specify, or select from the associated list, the full or partial user name of the account to which users must belong to access the folder or file. This field is available only if accounts are enabled.
Collaboration Project	Specify, or select from the associated list, the full or partial name of the collaboration project associated with the folder or file. This option is only available if your server is configured for collaboration projects.

Element	Description
User Access List	Specify the access control list users and the permissions assigned to each user. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add User	Click to adds the selected name to the user access list. To remove a name from the list, click the red X next to the name.
Group Access List	Specify the access control list groups and the permissions assigned to each group. In the selection box, enter the first two characters of a name to see a list of names that begin with those characters. You can use the "*" wildcard character to match one or more characters. For example, to see all names that start with the letter S, enter "S*". For more information about permissions, see Section A.4.2, "Access Control List Permissions."
Add Group	Click to add the selected name to the group access list. To remove a name from the list, click the red X next to the name.
Creator	Specify the full or partial user name of the folder or file's creator.
Creation Date	Specify the creation date or range of dates. To select a single date or the first date in a date range, click the calendar icon next to the **From** field and select a date from the calendar. To select the second value in a date range, click the calendar icon next to the **To** field and select a date from the calendar.
Last Modifier	Specify the full or partial user name of the user who last modified the folder or file.
Last Modified Date	Specify the last modification date or range of dates. To select a single date or the first date in a date range, click the calendar icon next to the **From** field and select a date from the calendar. To select the second value in a date range, click the calendar icon next to the **To** field and select a date from the calendar.
Results Options	Specify how to present the search results.
Sort By	Select from the following values to sort the search results: ▪ **Folder Name** or **File Name** (default) ▪ **Creation Date** ▪ **Last Modified Date**
Order field	Select the order used (**Ascending** or **Descending**): ▪ **Ascending** (default) ▪ **Descending**

A.10.7 Editing Default Metadata Values Page

The Editing Default Metadata Values page defines the default metadata values to apply to new content added to a folder. These values do not affect content items defined in the repository and then added to a folder, nor do they affect revisions to existing documents. These values also act as the base values when propagating metadata values from the folder.

You can use Idoc Script in any of the information fields.

For information about the metadata values themselves, see Section A.6.5, "Info Update Form."

A.10.8 Propagate Page

The Propagate page defines the metadata values to apply to content (and optionally to links) items in the current folder and its subfolders. You can selectively specify and apply any or all values on this page. You can also use metadata profiles defined by your system administrator. For information about the metadata values themselves, see Section A.6.5, "Info Update Form."

Element	Description
Path	Shows the path for the current folder.
Content Fields	Define the metadata values to apply to content items in the current folder and its subfolders. You can specify values for any or all fields. ▪ You can select any pre-defined profile from the **Profile** field. ▪ You can use Idoc Script in any of the information fields.
Select Field check box	Select to propagate the associated field value.
Propagate to Folders Only	Select to propagate the selected field values to folders but not the content items within the folders. This option is not available with query folders.
Force Propagation	Select to propagate the selected field values even for folders that by default block propagation actions. This option is not available with query folders.

A.11 WebDAV Interface

This section describes the pages and options for working with WebDAV.

This section covers the following topics:

- Section A.11.1, "WebDAV Folders"
- Section A.11.2, "WebDAV User Interface"

A.11.1 WebDAV Folders

You can use the WebDAV interface with either the Contribution Folders interface (Folders_g component) or the Folders interface (FrameworkFolders component).

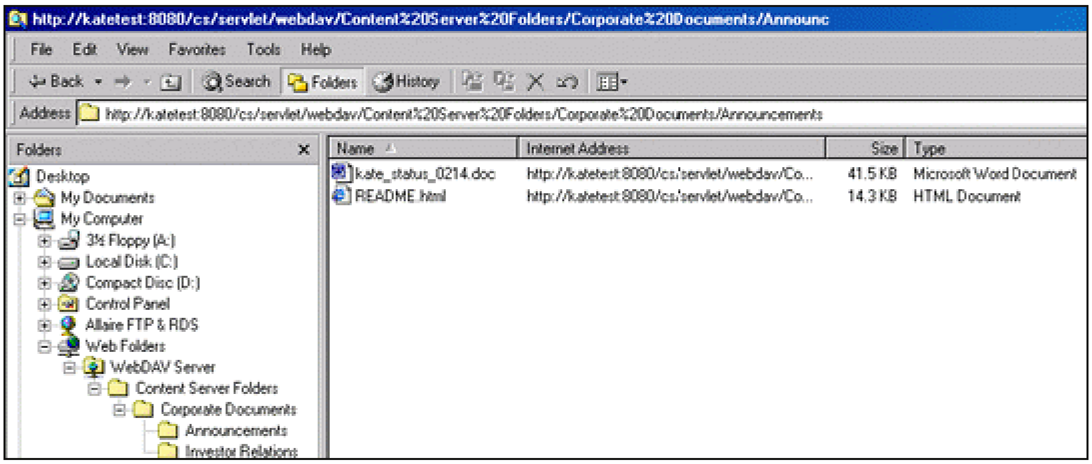
You can work with folders and files in much the same way you would in a file system, however, the folders and files are managed by Content Server. When you copy a file to a WebDAV folder, you check in a new content item. If you replace a file in a WebDAV folder, you check in a new revision of the content item.

The user and security controls in Content Server and the Folders component also apply to content that is managed using WebDAV clients. For example, if you have Read permission for a content item, you are able to view the file, but you are not able to check in a new revision of the file.

A WebDAV client is an application that can send requests and receive responses using the WebDAV protocol. With a WebDAV client such as the applications in Microsoft Office, you can check content out of the Content Server repository, modify the content item, and check in a new revision using the native application menus.

Figure A–1 shows how a typical set of WebDAV contribution folders would look in Windows Explorer.

Figure A–1 WebDAV Contribution Folders in Windows Explorer



A.11.2 WebDAV User Interface

The WebDAV interface provides a subset of the options available through the browser interface. Basic folder and file operations in the WebDAV interface, such as cut, copy, paste, move, and delete are similar to those in the native file system. To perform other management tasks, such as specifying or propagating metadata values, you must use the standard browser interface.

For more information about the Contribution Folders interface, see Section A.9, "Contribution Folders Interface."

For more information about the Folders interface, see Section A.10, "Folders Interface."

A.12 Folio User Interface

This section describes the pages and contextual menus added to Content Server when folios is enabled.

This section covers the following topics.

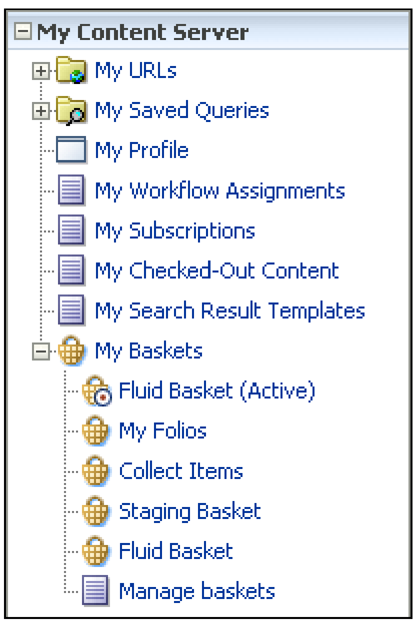
- Section A.12.1, "My Content Server Tray: My Baskets"
- Section A.12.2, "Content Management Tray: New Folio"
- Section A.12.3, "Pick Folio Type Page"
- Section A.12.4, "Edit Simple Folio Page"
- Section A.12.5, "Edit Folio Page"

- Section A.12.6, "Set Folio Profile Page"
- Section A.12.7, "Folio Check In Page"
- Section A.12.8, "Folio Check In Confirmation Page"
- Section A.12.9, "View Folio Page"
- Section A.12.10, "Manage Content Baskets Page"
- Section A.12.11, "Content Basket Page"
- Section A.12.12, "Move/Copy Basket Items Page"
- Section A.12.13, "Insert Hypertext Page"
- Section A.12.14, "Subscribe to folio_name page,"

A.12.1 My Content Server Tray: My Baskets

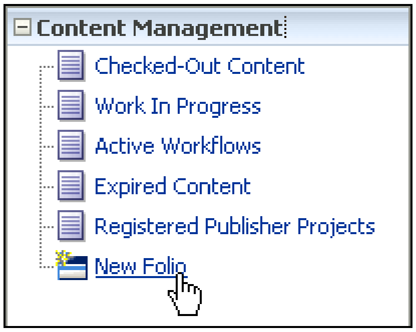
Content Baskets are created by you and used as an unstructured place to collect content you want to access quickly. They are similar to Saved Queries, in that they display a search results page listing content associated with the basket. They differ from Saved Queries in that the only defining criteria for the search is whether you have specifically added a content item to a basket.

Content baskets are displayed under the **My Baskets** folder in the **My Content Server** tray, and also in the **Source Items** tray of the Edit Folio Page. Click **My Baskets** or **Manage baskets** to open the Manage Content Baskets Page, where you can add, modify, delete, or make baskets active.



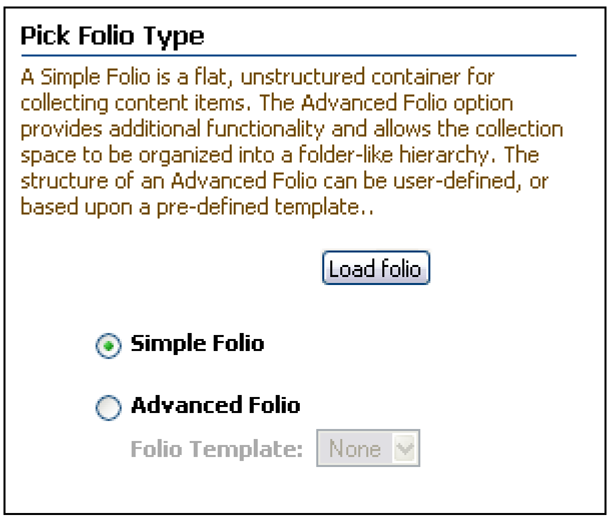
A.12.2 Content Management Tray: New Folio

New folios are created using the **New Folio** link on the Content Management tray. Click New Folio to open the Manage Content Baskets Page.



A.12.3 Pick Folio Type Page

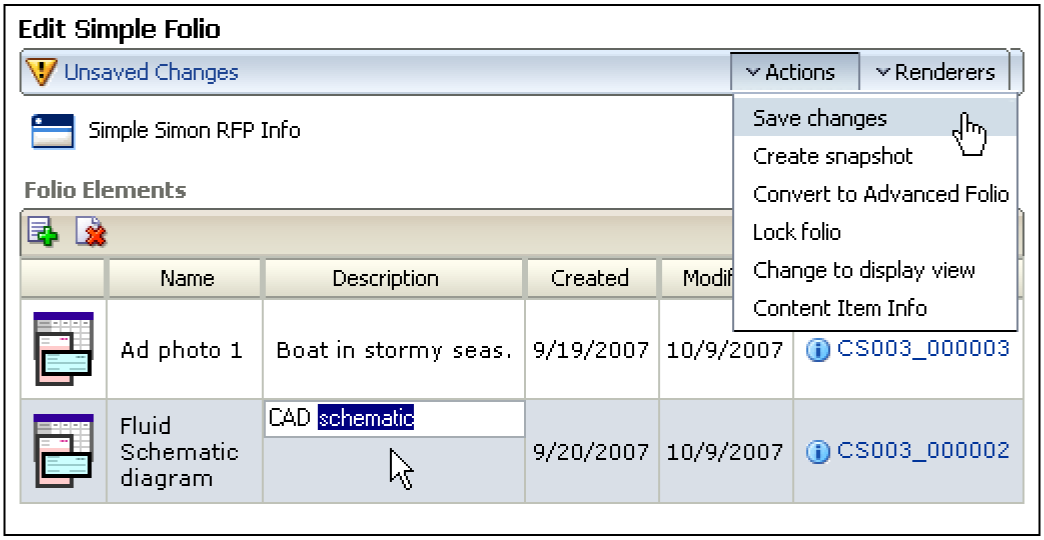
To select the type of folio to create, click **New Folio** in the Content Management tray to open the Pick Folio Type page.



Form Element	Description
Load Folio	Opens the Edit Simple Folio Page or Edit Folio Page for the type of folio selected.
Simple Folio	A simple folio is a folio with no structure established. Items in a simple folio are displayed as a table on the Edit Simple Folio Page, and can be reordered in the table, but not nested in a hierarchy unless you convert the simple folio to an advanced folio. If you convert a simple folio is converted to an advanced folio, you cannot convert it back to a simple folio.
Advanced Folio	An advanced folio has structure. The structure can be predefined by the system administrator in a template selected by the user. The structure of a template-based folio can be modified later, depending on the template. If no template is selected, then the folio is created with no structure established. When you select this option, the folio contains a root level node only, and the structure can be modified later. You cannot convert an advanced folio to a simple folio.
Folio Template	Lists the templates available on which the new folio is based.

A.12.4 Edit Simple Folio Page

The Edit Simple Folio page displays the element info of content associated with a simple folio in a table. Although a simple folio displays content in a manner similar to a standard search results page, there is an important difference. A standard search results page displays content information from a content item's metadata. The Edit Simple Folio page displays element information from the XML file stored in Content Server that defines the folio. This element information is unique to the folio, and can be changed in the folio without affecting the content item's metadata.



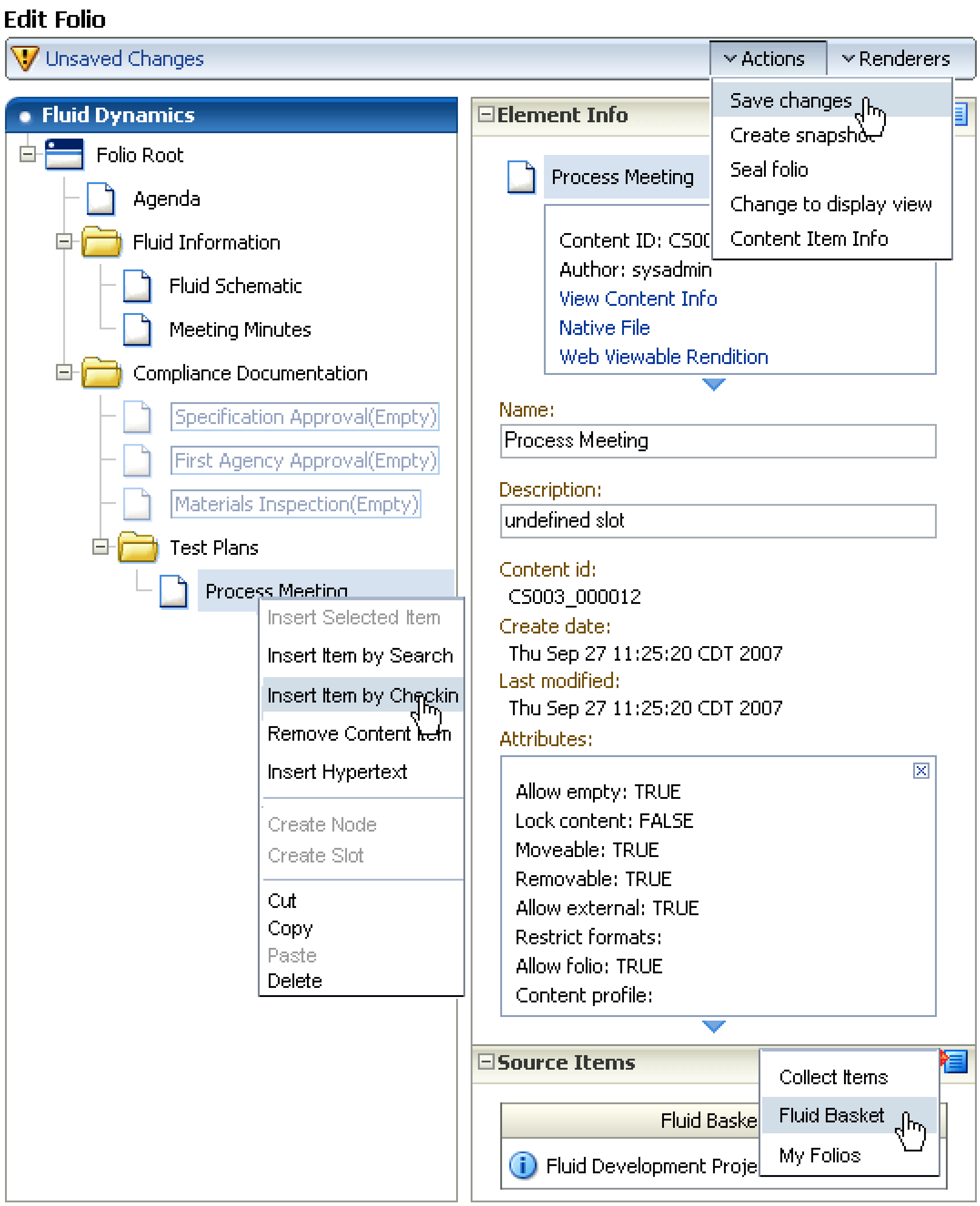
Item	Description
Changes notification	Displays the status of any changes made to the folio. An icon with an exclamation point indicates unsaved changes. An icon with a check mark indicates changes were saved.
Actions menu	See Section A.12.5.4, "Actions Menu."
Renderers menu	See Section A.12.5.5, "Renderers Menu."
Add icon	Displays a search form for finding items within Content Server to add to the folio.
Delete icon	Deletes the selected item from the folio. To select an item, click the item row.
Thumbnail	Displays a small image of the item if your system administrator has set up Content Server to create thumbnails. If thumbnails are not set up, an icon associated with the item type is displayed. Click the thumbnail to open the content information page.
Name	Displays the text entered into the name element of the folio XML file. When a content item is first added to a simple folio, the name element contains the content item title metadata from Content Server. After you associate a content item with a folio, you can edit the name element in each folio.
Description	Displays the text entered into the description element of the folio XML file. When a content item is first added to a simple folio, the description element is blank. After you associate a content item with a folio, you can edit the description element in each folio.
Created	Displays the text entered into the creation date element of the folio XML file. When a content item is first added to a simple folio, the creation date element contains the creation date from the content item metadata from Content Server.

Item	Description
Modified	Displays the text entered into the modification date element of the folio XML file. When a content item is first added to a simple folio, the modification date element contains the current date. The modification date updates each time the element information is updated. For example, if you edit the description text of an item in the simple folio, the modification date for that item changes. The modification date does not change if changes are made to the content item metadata in Content Server.
Content Item	Displays the Content ID of the associated item and the information icon. Click the Content ID to open the Web-viewable of a content item. Click the information icon to open the standard content information page for the item.

A.12.5 Edit Folio Page

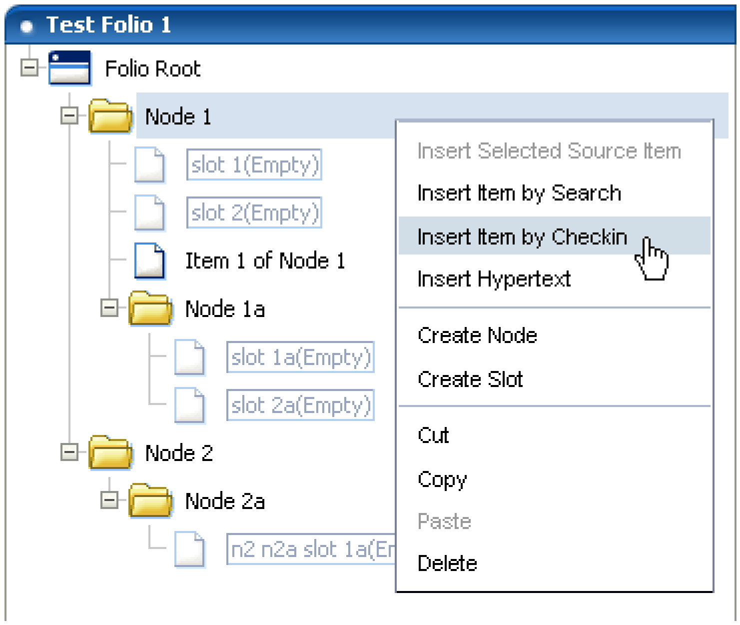
Click the content ID or the folio icon in the **Actions** column of a search result to open the Edit Folio page. From the Edit Folio page, you can add nodes, slots, and items to the folio, find information about the folio and its contents, lock or take a snapshot of a folio, and view or render the folio. The left side of the Edit Folio page displays the folio structure. The right side of the Folio is a series of trays, similar to the left area of Content Server. Click the heading of a tray to expand or collapse the tray. The main areas on the Edit Folio page are:

- Folio Structure Tray
- Element Info Tray
- Source Items Tray
- Actions Menu
- Renderers Menu



A.12.5.1 Folio Structure Tray

The left side of the Edit Folio page is the folio structure section. It displays the nodes, slots, and items that comprise the folio hierarchy. Right-click within the folio structure area to open a contextual menu for performing a variety of tasks, such as adding and deleting nodes and slots, or inserting content items.



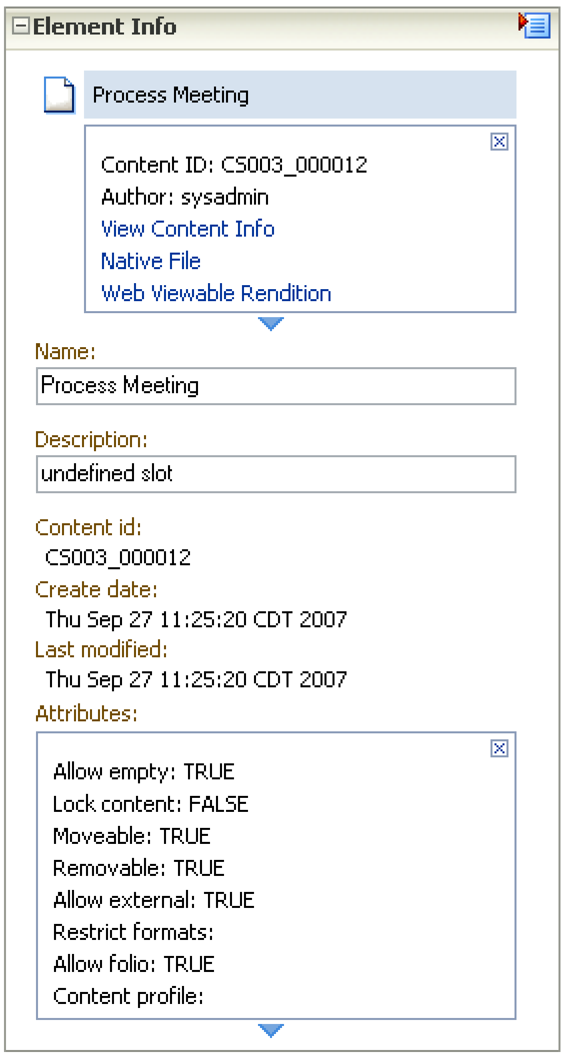
A.12.5.1.1 Folio Structure Contextual Menu The following options are available in the folio structure section contextual menu.

Item	Description
Insert Selected Source Item	Inserts the item in the folio slot with the selected item from the Source Items Tray. If the slot currently contains a content item, the item is replaced with the source item.
Insert Item by Search	Displays a child window with a search form that searches Content Server for a previously checked-in item, and adds it to the folio in the selected node or slot. If the slot currently contains a content item, the item is replaced with the found content. Available in all contexts: Nodes, Slots, and Items.
Insert Item by Checkin	Displays a child window with a content check-in form that checks a new content item in and adds it to the folio in the selected node or slot. If the slot currently contains a content item, the content item is replaced with the checked in content. Available in all contexts: Nodes, Slots, and Items
Remove Content Item	Removes a content item from a slot. Note that this does not delete the slot, but empties it, leaving the folio structure intact. To delete a slot, you must select Delete from the contextual menu. Available in Item context only.
Insert Hypertext	Creates a new item in the folio structure that can establish a hypertext link to the specified URL. Available in all contexts: Nodes, Slots, and Items
Create Node	Creates a new node or sub-node in the folio structure.
Create Slot	Creates an empty slot in the folio structure.
Cut	Cuts an item, node, or slot from the folio structure for placement elsewhere in the same folio. Available in all contexts: Nodes, Slots, and Items
Copy	Copies an item, node, or slot from the folio structure for placement elsewhere in the same folio. Available in all contexts: Nodes, Slots, and Items

Item	Description
Paste	Pastes an item, node, or slot that was previously cut or copied from the folio structure into another area of the same folio. Available in all contexts: Nodes, Slots, and Items
Delete	Deletes an item, node, or slot from the folio structure. Available in all contexts: Nodes, Slots, and Items

A.12.5.2 Element Info Tray

The first tray on the right side of the page is the element info tray. The element information comes from the XML file checked in to Content Server that defines the folio. When you select a node, slot, or item in the folio structure section of the page, information about what is selected is displayed in the element info section, where you can modify it. Modified information is written to the XML file checked in to Content Server.



Important: The element information is unique to the folio, and not to the content item associated with the folio. A single content item can be associated with several different folios, and the element information about that item might be different in each folio. It is important to remember that if you change the element information in one folio, the information does not change in another folio.

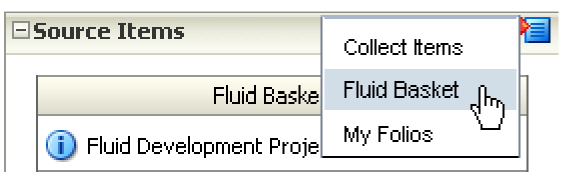
The information displayed for all elements includes name, description, and attributes. Slots also display the creation date and last modification date of the slot, and the content id of the content item if one is associated with the slot. Hyperlinks display the URL of the link.

Information	Description
Title	The title of the item in Content Server.
Content ID	The content ID of the item in Content Server.
Author	The name of the person who last checked the item into Content Server.
View Content Info	Click this link to open the content information page for the item in a separate window.
Native File	Click this link to download the native file from Content Server.
Web Viewable Rendition	Click this link to open the Web-viewable file for the item in a separate window.
Name	The name given the element, as displayed in the folio hierarchy. Displayed for all elements. If you assign a content item to a slot, and this value is blank or *undefined* (the default for slots), the value of the content item's Title field is used as the Name.
Description	A description of the element to help identify its intended use. For example, a slot named *Field Report* could have a description of *Information gathered at the scene by first responders.* Displayed for all elements.
Content id	The unique identifier of a content item associated with a slot. This field is blank for slots without an associated content item.
Create date	The date the slot was created.
Last modified	The date changes were last made to the slot.

Information	Description
Attributes	Allowable uses and limitations of an element. Attributes are identical for slots and items, but differ for nodes. Default attributes for slots and items: ■ **Allow empty:** The slot can be empty. ■ **Lock content**: You cannot delete items from the slot. ■ **Removable**: You can delete the slot. ■ **Allow external:** You can specify an external link for the slot. ■ **Restrict formats:** Specifies what content item formats are allowed to populate the slot. ■ **Allow folio:** Specifies whether a folio can populate the slot. ■ **Content profile:** Specifies the content profile used when adding an item by search or check in. Default attributes for nodes: ■ **Removable:** You can delete the node. ■ **Children moveable:** You can move subnodes. ■ **Allow item creation:** You can create items within the node. ■ **Allow node creation:** You can create subnodes within the node. ■ **Maximum Items**: Specifies the total number of items that can be created within the node. ■ **Maximum Nodes:** Specifies total number of nodes that can be created within the node. ■ **Content Profile**: Specifies the content profile used when adding an item by search or check in.
link	The URL of the hyperlink. Displayed for hyperlinks only.

A.12.5.3 Source Items Tray

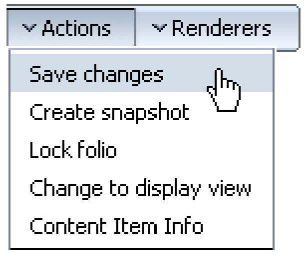
The Source Items tray provides the ability to collect items checked in to Content Server for use in the folio. The default enables you to search Content Server and display a listing of search results in the tray, from which you can select one or more items to insert into the folio.



Additionally, the selection menu in the Source Items tray heading enables you to select a content basket to display in the tray if you have previously collected items in a content basket and now want to add them to a folio.

A.12.5.4 Actions Menu

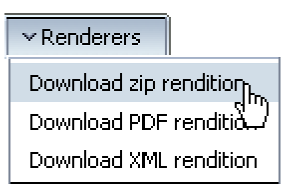
The **Actions** menu on the Edit Folio Page enables you to access and control the folio versions checked in to Content Server.



Item	Description
Save Changes	Saves the folio and any changes to the folio. When saving a folio for the first time, the Set Folio Profile Page opens to initiate checking the folio in to Content Server. When saving subsequent changes, the graphic under the page title changes from **Unsaved Changes** to **Changes Saved**. Saving a folio does not update the revision of the folio in Content Server. The revision of a folio is not updated until a snapshot of a folio is made, or until a locked folio is unlocked for additional editing.
Create snapshot	Creates a new revision of the folio in Content Server. When a snapshot is created, the folio hierarchy displayed in the Folio Structure Tray is collapsed, but editing of the folio can continue.
Lock folio	Locks a folio at the latest released revision, preventing further updates unless unlocked. When a folio is locked, the display changes to the View Folio Page.
Create editable revision	Creates a new, unlocked revision of a locked folio. This option is displayed only on the View Folio Page of a locked folio.
Change to display view	Displays the View Folio Page.
Content Item Info	Displays the standard content information page for the folio.

A.12.5.5 Renderers Menu

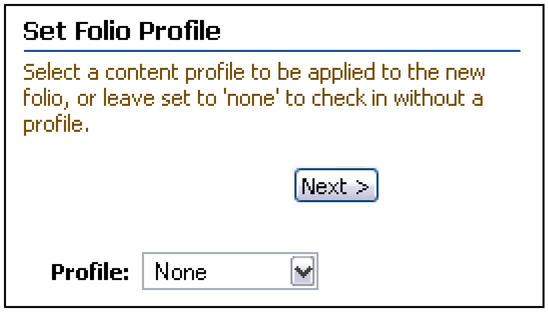
The Renderers menu on the Edit Folio Page allows you to download folio content items in a variety of formats.



Item	Description
Download zip rendition	Downloads a compressed (.zip) file of all folio content for distribution. For example, a folio of catalog art, text, and instructions can be compressed and downloaded into a single .zip file to give to the print vendor.
Download PDF rendition	Downloads all folio content that has a PDF version available, consolidated into one printable portable document format (PDF).
Download XML rendition	Downloads an XML file articulating the folio hierarchy.

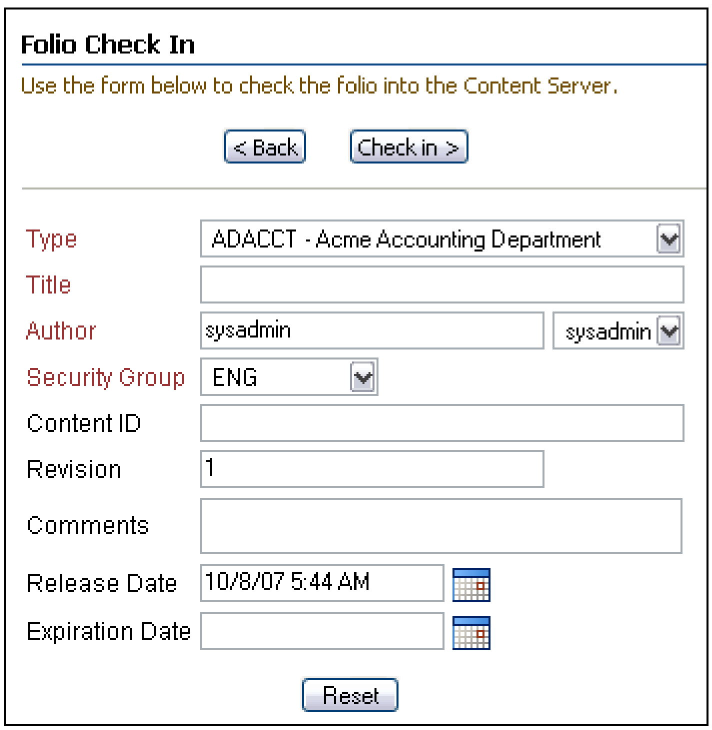
A.12.6 Set Folio Profile Page

The Set Folio Profile page is accessed when you first select **Save folio** from the Actions menu of either the Edit Simple Folio Page or Edit Folio Page. It allows you to select a profile for the folio if your system administrator has created any.



A.12.7 Folio Check In Page

To access the Folio Check In page, click **Next** on the Set Folio Profile Page. It displays a modified check-in form that allows you to specify metadata for the folio.



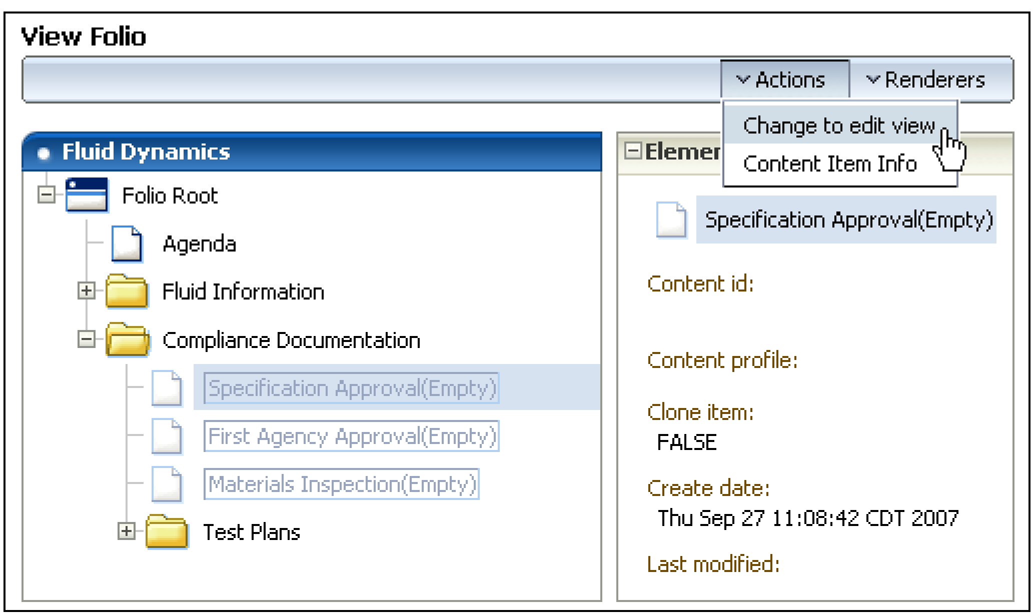
A.12.8 Folio Check In Confirmation Page

To access the Folio Check In Confirmation page, click **Check in** on the Folio Check In Page. It confirms the folio has been successfully checked in, and provides you with the following options of how to proceed when you click **Finish**:

Option	Description
Continue editing the folio	Displays the Edit Simple Folio Page or Edit Folio Page of the folio checked in.
View content information for the folio	Displays the standard content information page for the folio.
View the folio	Displays the View Folio Page for the folio.

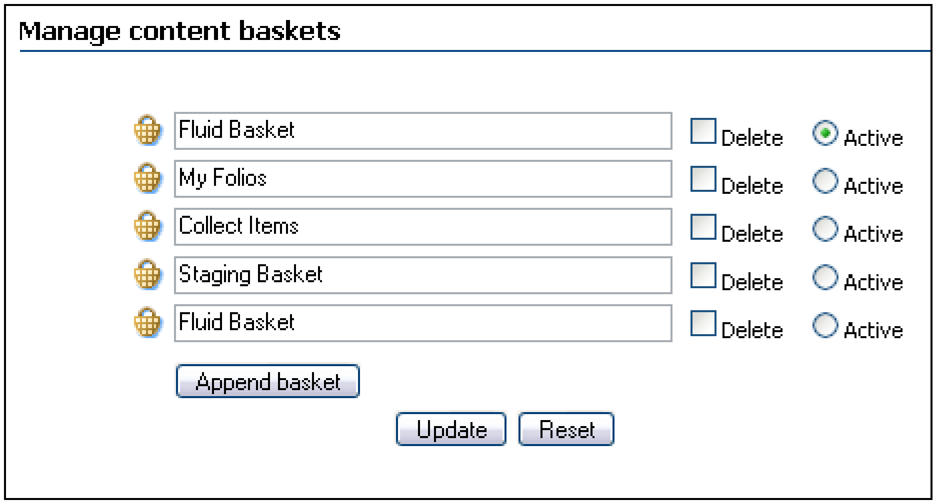
A.12.9 View Folio Page

By default, the View Folio page is identical to the Edit Folio Page, displaying the folio as a folder hierarchy with nodes, slots, and items. However, because the folio is stored in Content Server as an XML file, your system administrator can create additional folio views to display folio structure in a way more relevant to your business, and can set a new default view. When displayed as a view, you cannot edit the folio.



A.12.10 Manage Content Baskets Page

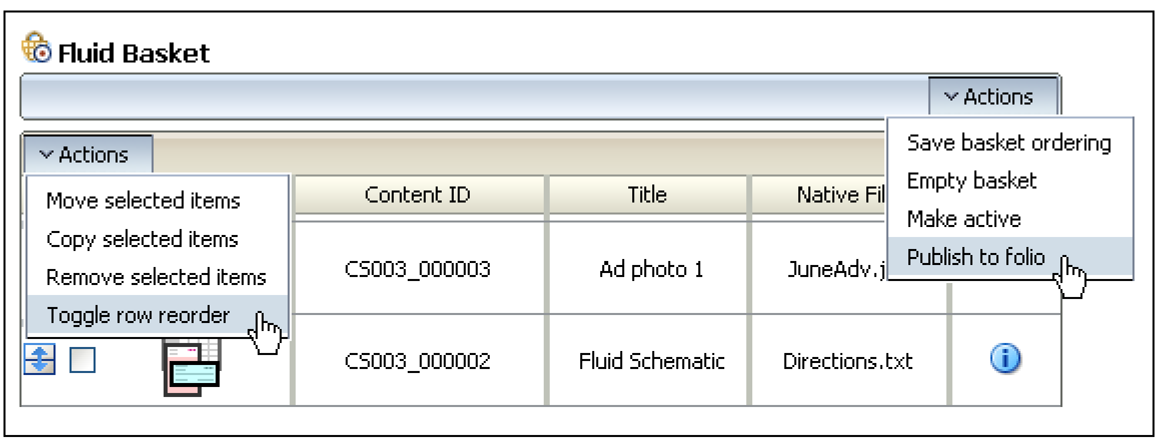
To access the Manage Content Baskets page, click My Baskets on the My Content Server tray, or click **Manage Baskets** under the **My Baskets** folder in the **My Content Server** tray. The Manage Content Baskets page enables you to append, rename, or delete a content basket, and to set which is the active basket.



A.12.11 Content Basket Page

To access the Content Basket page, click a basket under the **My Baskets** folder in the **My Content Server** tray. The Content Basket page is a search results listing showing all items you have explicitly placed in this content basket.

Note: There is a limit of 1000 items in a content basket.

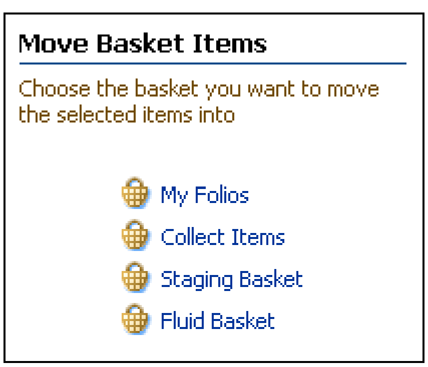


Item	Description
Thumbnail	Displays an icon of the item type, or a thumbnail of the content item if your system administrator has set up Content Server to create them.
Content ID	Displays the content ID of the content item.
Title	Displays the title of the content item.

Item	Description
Native File	Displays the name of the native file of the content item.
Info	Click the info icon to open the content information page of a content item.
Actions menu (table)	The table actions menu lists actions that can be applied to any selected item or items in the content basket. ▪ **Move selected items:** Displays the Move/Copy Basket Items Page, allowing you to select a different basket in which to move the item. ▪ **Copy selected items**: Displays the Move/Copy Basket Items Page, allowing you to select an additional basket in which to copy the item. ▪ **Remove selected items:** Removes selected items from the content basket. ▪ **Toggle row reorder:** Displays up and down arrows that allow you to move rows within the basket to reorder them. After reordering the rows, you must select Save basket ordering from the page actions menu to preserve the new order.
Actions menu (page)	The page actions menu lists actions that you can apply to the entire content basket. ▪ **Save basket ordering:** Saves any changes made to row order using the Toggle row reorder action from the Table Actions menu. ▪ **Empty basket**: Removes all items from the content basket. ▪ **Make active**: Makes the displayed basket the active basket. You can add content items to the active basket only. ▪ **Publish to folio:** When selected, all items in the content basket with be added to a new advanced folio with a flat hierarchy.

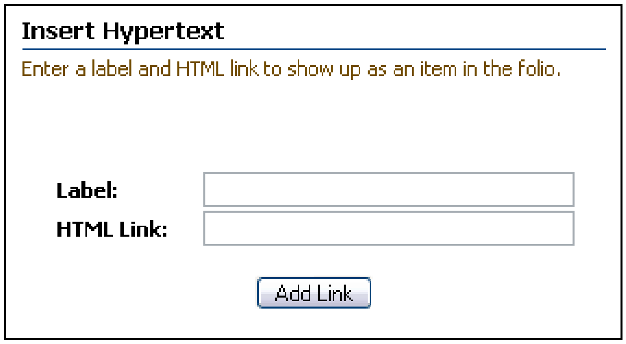
A.12.12 Move/Copy Basket Items Page

To access the Move/Copy Basket Items page, select a content item or items in a content basket from the Content Basket Page, and select either **Move selected items** or **Copy selected items** from the table Actions menu. Click the basket on the page to which you want to move the item or items.



A.12.13 Insert Hypertext Page

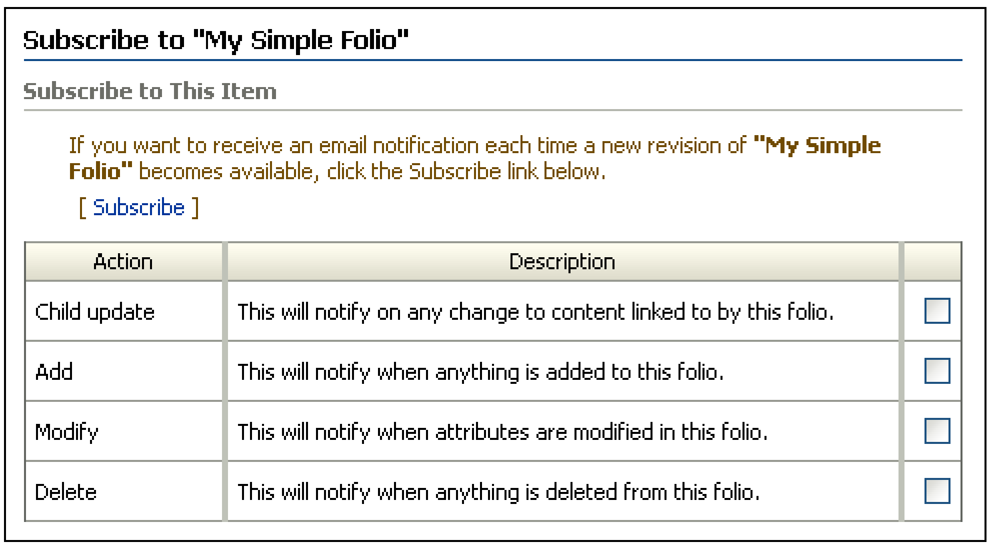
To access the Insert Hypertext page, select Insert Hypertext from the Folio Structure Contextual Menu on the Edit Folio Page. With this page you can add a label and hypertext link as a new item in the folio structure.



Item	Description
Label	A description or other identifier for the item.
HTML Link	The URL of the hypertext link. For example, http://example.com.

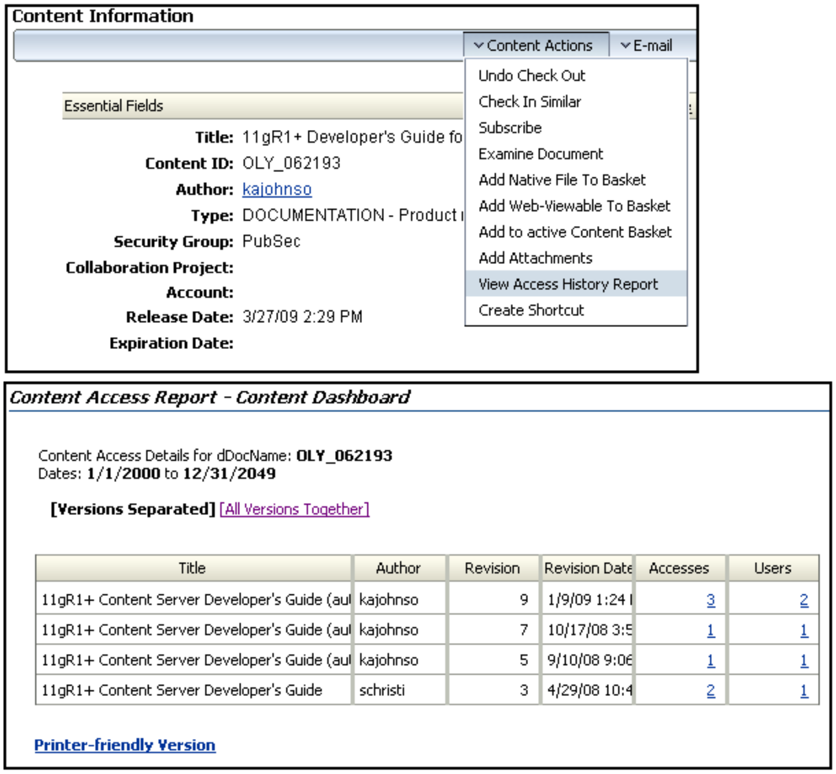
A.12.14 Subscribe to folio_name page

To access the Subscribe to *folio_name* page, select **Subscribe** from the page Actions menu of a Content Server content information page for a folio. Select actions from the list and click **Subscribe** to be notified when the actions occur.



A.13 Content Tracker Interface

When enabled, the Content Tracker component enables users to generate a pre-defined access history report of a content item. To generate this report, select the **View Access History Report** option from the Content Actions menu on the document's Content Information page.



Field	Description
Report name	The name of the selected query report.
Dates	The dates entered in the Start Date and End Date fields. If you did not enter specific dates, the default dates are used for the query.
Results table	Provide the relevant information for the selected report.
Printer-friendly Version	Opens a new browser window and displays the report without the navigation trays.

Glossary

access

The level of permission a member has to a content item. See also Permission.

access control list (ACL)

A list of users, groups, or enterprise roles with permission to access or interact with a particular content item.

account

A Oracle security element that enables greater flexibility and granularity in a security structure than security groups provide. Content can be assigned to a particular account upon check-in, and users can access the content only if they have the appropriate permission to that account. See also security group, documents without accounts, #none, and #all.

account hierarchy

Structure whereby accounts are ordered in levels (for example, Company/Region/Store). Permission to a particular level in the account hierarchy also permits access to all of its sub-level accounts.

account prefix

Permission to an account prefix grants access to all accounts with that prefix. For example, permission to the "ACME" account provides access to all content checked in with any account that begins with *ACME*, such as "ACME/Midwest" or "ACME/Midwest/Store_1."

active report

A list that contains the results of a database query that is dynamically generated each time the report page is accessed. This type of report always reflects current content server information. Active reports are accessed through the hierarchical link structure (the "Library"). See also historical report.

administration applets

See administration application.

administration application

A Java application used for administration such as: User Admin, Workflow Admin, Web Layout Editor, Repository Manager, Configuration Manager (system administrator only), or Archiver (system administrator only).

These applications can be run as a Java applet from a Java-enabled browser, or in standalone mode from the Content Server computer.

administration rights

Permission to use an administration application. A user must also have admin permission to at least one security group to be able to use the administration applications for which they have rights.

administrator

Person in an organization that manages all or part of a content server system. See also consumer, contributor, subadministrator, and system administrator.

admin permission

The permission level that enables users to perform the following tasks within a particular security group:

- Viewing content
- Checking in content
- Checking out content
- Getting a copy of content
- Deleting content
- Checking in content with another user specified as the author
- Using the User Admin, Workflow Admin, Web Layout Editor, and Repository Manager administration applications (the user must also have administration rights for the application)

See also read permission, write permission, and delete permission.

admin role

A standard role that gives the user read, write, delete, and admin permission to all security groups and rights to all administration tools. This role does not allow a user to access the Admin Server. See also guest role, contributor role, and sysmanager role.

Advanced Search

A function that enables users to search by full-text and all metadata fields, specify search operators, and specify how search results are to be displayed. See also Quick Search.

alias

A name that represents one or more users in workflows and subscriptions. For example, the "Sales" alias could include all users in a sales department.

#all

A special account classification used to assign a user a single permission level for all accounts.

alternate file

A Web-viewable version of the primary file, or a version that can be converted to a Web-viewable format upon check-in. The alternate file must be specified and checked in at the same time as the primary file. See also primary file.

approve

To accept a revision in a workflow. See also reject.

ascending sort order

Arrangement of data in a low to high sequence; for example, from A to Z or from 0 to 9. See also descending sort order.

associated discussion

A discussion that relates to a particular folder or content item. See also discussion.

authentication

The process by which the Content Server system validates a user's logon information. The user name and password are compared against an authorized list. If the system detects a match, access is granted to the extent specified in the permissions list for that user.

Author

A required metadata field that specifies the user who checked in a content item revision.

authorization type

The way that Oracle groups users, depending on how their user attributes are defined: local user, global user, or external user. Also referred to as *user type*.

automatic numbering

Assigning content IDs automatically in sequential order as new content items are checked in. This is an optional content server feature that can be enabled or disabled in the System Properties utility or the Admin Server.

autonumber prefix

An optional prefix that is placed before the sequential portion of the content ID when automatic numbering is enabled.

basic subscription

A subscription to an individual piece of content by content ID. See also criteria subscription, forced subscription, and open subscription.

basic workflow

A type of workflow where specific content items are entered into a workflow by an administrator. See also criteria workflow.

caption

See field caption.

check in

To submit a file to the Content Server file repository.

check out

To lock a content item in the Content Server file repository so that no other users can revise it. Other users can still view and get a copy of a checked out content item. See also undo check-out.

check out and open

A feature that enables users to check out and open content items directly in a WebDAV-compliant native application from Oracle WebCenter Content Server. This feature requires WebDAV to be enabled.

child

A page or folder that is one level lower in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also parent.

choice list

See option list.

Classic View

A predefined search result template showing a thumbnail, title, and other content information for each returned content item on multiple lines of a search result list.

Comments

An optional metadata field that contains general notes about a content item.

consumer

A content server user who finds, views, or prints content. See also contributor, subadministrator, and administrator.

consumption site

A Web site that content consumers use to view content. Content contributors use a different Web site (a contribution site) to check in content.

content

A collective term for the content items in the Content Server repository.

content ID

A standard, required metadata field that provides a unique identifier for each content item.

content information

See metadata.

content item

A file that has been checked in to the Content Server repository. A content item includes a primary file and metadata, and can include an alternate file.

content profile

A set of criteria based on rules established by the system administrator to define which metadata fields are available on search and check-in forms and how they behave, and which metadata information is displayed on the content information page.

content repository

The place where content files are stored. Oracle WebCenter Content Server uses two file repositories: one for the native files and one for the Web-viewable files.

content type

A designation used to group similar content by category (for example, "Invoices").

contribution site

A Web site that content contributors use to check in content. Content consumers access a different Web site (a consumption site) to view the content.

contributor

(1) A content server user who creates, revises, and collaborates on documents. See also consumer, subadministrator, and administrator.

(2) A user who submits a content item to a basic workflow.

contributor role

A standard role that gives the user read and write permission (RW) to the Public security group. See also guest role, admin role, and sysmanager role.

conversion

The process of changing an electronic file to a different file format (for example, changing a Microsoft Word document into PDF or HTML format).

core

The basic functionality of Oracle WebCenter Content Server.

criteria subscription

A subscription to a group of content items based on metadata criteria. See also basic subscription, forced subscription, and open subscription.

criteria workflow

A type of workflow where a content item automatically enters the workflow if the security group and one metadata field match predefined criteria. See also basic workflow and sub-workflow.

current revision

See latest revision.

custom metadata field

An administrator-defined metadata field.

Deleted status

The revision status that indicates that the revision has been deleted and is waiting to be completely removed from Content Server during the next indexing cycle.

delete permission

The permission level that allows users to perform the following tasks within a particular security group:

- viewing content
- checking in content
- checking out content
- getting a copy of content
- deleting content

See also read permission, write permission, and admin permission.

dependent choice list

An option list in which the options depend on what is selected in a different option list. For example, if there is an option list for the Continent field and another option list for the Country field, the available choices in the Country option list depend on which Continent is selected.

descending sort order

Arrangement of data in high to low sequence; for example, from Z to A or from 9 to 0. See also ascending sort order.

discussion

A set of threaded messages that enable project members to comment on projects, folders, content items, and general topics.

documents without accounts

A special account classification that assigns a permission level for content items that do not have an account specified. Same as #none.

document type

A designation used to group similar documents by category (for example, "Invoices").

Done status

The revision status that indicates that the revision has been indexed and is waiting to be released on its specified release date.

download

To copy a file from Content Server to your local hard disk.

download applet

An optional Java applet that enables users to download multiple content items at the same time. The content items can also be checked out during the download process. See also multiple file check-out.

editor

A user who can approve, reject, and check out a workflow item for editing.

Edit status

The revision status that indicates that the revision is at the initial contribution step of a workflow.

Expanded Form

The form on the advanced search page that displays all available metadata fields on a single page. See also Query Builder Form and Advanced Search.

expiration date

The date and time when a revision is no longer available for searching or viewing in Content Server.

Expired status

The revision status that indicates that the revision is no longer available for searching or viewing in Content Server.

external collection

A set of content files that are indexed and stored in a separate search engine collection rather than in the Content Server database.

external members

Users or groups who have access to your Content Server system but are not employees of your company or members of your organization.

external user

An authorization type where user security attributes (password, roles, and accounts) are stored in an external storage system. External users might use a Microsoft network login or another type of provider (LDAP) login. See also local user and global user.

field caption

The name of a metadata field as it appears on Web pages. For example, "Content ID" is the field caption, while the internal field name is "dDocName."

file format

The structure of a file. The file format is determined by the application used to create the file, and can typically be determined by the file extension (such as *.pdf* or *.doc*).

folder

A level in the project hierarchy. Folders can contain subfolders, content items, and general discussions.

Folder Name

A required metadata field that specifies a unique name for a folder.

folder owner

See owner.

Folders component

A Oracle WebCenter Content Server "Extras" component that is required as a foundation for Oracle WebCenter Content Server.

forced subscription

A subscription where users and aliases are assigned to the subscription by an administrator. If individual users are assigned, each user can unsubscribe if they want. If an alias is assigned, the users in that alias cannot unsubscribe. See also open subscription, basic subscription, and criteria subscription.

format

The file type for a primary or alternate file, such as a Word document (.doc), bitmap image (.bmp), Acrobat file (.pdf), and so on.

full-text indexing

The process of creating a searchable index that includes every word in a file.

full-text search

A search that compares the query expression against every word in a file. See also metadata search.

full-text search operator

A word or symbol that refines the query expression for a full-text search (for example, AND, OR, and double quotation marks ").

GenWWW status

The revision status that indicates that the revision is being converted to Web-viewable format or is being indexed, or has failed conversion or indexing.

global user

An authorization type where user security attributes (password, roles, and accounts) are stored on master content server, but the user has access to proxied content servers as well. Global users are considered "lightly managed" users, as this authorization type limits some user functions to enhance scalability and performance. Note that all self-registered users are global users by default. See also local user and external user.

group

A group of users that can be referenced by a single name.

guest portal page

The Web page that users see after they start Content Server but before they log in. See also login portal page.

guest role

A standard role that gives the user read permission (R) to the Public security group. A login is not required to access content items in the security groups for which the *guest* role has permission. This role is assigned to anonymous users by default. See also contributor role, admin role, and sysmanager role.

Headline View

A predefined search result template showing content information for each returned content item on a single line of a search result list.

historical report

A list that contains the results of a database query that was performed at a specific date and time. This type of report provides a "snapshot" of content server information as it existed at a particular moment. Historical reports are built with the Web Layout Editor and accessed through the Library. See also active report.

Home page

See guest portal page and login portal page.

Idoc Script

Oracle's proprietary server-side script language that you can use to modify the functionality and look-and-feel of Content Server and related products. Idoc Script tags are in the format <$script$>.

Inbound Refinery

Content Server software that converts native files to Web-viewable files, along with specific conversion add-on products (such as PDF Converter or XML Converter).

index

The name of the Web page at the highest level of the Library hierarchy in the Web Layout Editor. All other pages are at a lower level than (are children of) the index page.

Indexer

Software included with Oracle WebCenter Content Server that full-text indexes files and stores the indexed words in a database. When you do a full-text search for content, the Content Server looks for the search terms in this index. See also search index.

information field

See metadata field.

instance

A single copy of Oracle WebCenter Content Server. Multiple content server instances may be running on the same computer.

internal field name

The name of a metadata field as it appears on Web pages. For example, "Content ID" is a field caption, while the internal name of the field is "dDocName".

internal members

Users and groups who are employees of your company or members of your organization.

internet-style search syntax

Search techniques common to the most popular internet search engines.

item

A content item, folder, or discussion.

latest notification

The most recent date and time that a user was sent a subscription notification e-mail for a particular content item.

latest notification use

The most recent date and time that a user accessed a particular content item from a subscription notification e-mail.

latest revision

The most recent version of a content item.

Library

A hierarchical structure of links that organizes content items based on metadata criteria. Users can drill down through the levels of the Library to find content items they are looking for. The Library hierarchy is built using the Web Layout Editor application, and is accessed by users through the Library link in the portal.

locale

A setting that specifies the language of the Content Server interface and defines how Content Server handles language-specific issues, such as date formatting and full-text indexing. See also system locale and user locale.

local page

A type of link in the hierarchical link structure (the "Library") that links to another Web page that contains more local page links, URL links, and query links.

local user

An authorization type where user security attributes (password, roles, and accounts) are stored on master content server, and the user is included in all local content server functions. See also global user and external user.

log in

To gain access, or sign in, to the Oracle system. Logging in requires users to identify themselves by entering their user name and password, which Content Server uses to grant security permissions to content and rights to administrative functions.

login

See user name.

login portal page

The Web page that users see after they log in. See also guest portal page.

major revision

The primary revision label (for example, the number portion of the revision sequence 1a, 1b, 2a, 2b). See also minor revision.

member

A user or group who has been given access to a particular project, folder, or content item.

metadata

Information about a content item, such as title, author, or security group. You can use metadata to describe, find, and group content items. Also referred to as *content information*.

metadata field

A field on a Web page that defines metadata during check-in, or defines search criteria. Also referred to as *content information field*.

metadata propagation

A Folders component feature that enables contributors to copy default metadata values from parent folders to subfolders and content items.

metadata search

A search that compares the query expression against metadata field values. See also full-text search.

minor revision

The secondary revision label (for example, the letter portion of the revision sequence 1a, 1b, 2a, 2b). See also major revision.

multiple file check-in

An optional feature of Oracle WebCenter Content Server that enables users to check in multiple content items as a single compressed zip file. See also upload applet.

multiple file check-out

An optional feature of Oracle WebCenter Content Server that enables users to check out and download multiple content items at the same time. See also download applet.

My Checked-Out Content

Name of main menu element which provides links to a list of content that is currently checked out.

My Oracle Content Server

Name of main menu element which provides links to multiple user-specific tasks and options.

My Profile

Link in the toolbar and the My Oracle Content Server tray. See User Profile.

My Saved Queries

Name of main menu element which opens a list of queries that have been saved by the current user.

My Search Result Templates

Name of main menu element which provides links to the Search Result Templates for User Page, where you can specify what content item information is listed on a search results page and how that information is displayed.

My Subscriptions

Name of main menu element which opens a list of content items that the current user is subscribed to.

My URLs

Name of main menu element which opens a list of URLs that have been saved by the current user.

My Workflow Assignments

Name of main menu element which opens a list of content items in a workflow that the current user is assigned to do something with (for example, review).

native application

A software application that was used to create an original file that was checked in to Content Server (for example, Microsoft Word or Adobe Photoshop).

native file

The original file that is checked in to Content Server file repository. See also primary file.

native file format

The file format that an original file was created in.

#none

A special account classification that assigns a permission level for content items that do not have an account specified. Same as documents without accounts.

notification

The act of informing users through e-mail. In Oracle WebCenter Content Server, subscriptions and workflows use e-mail notification.

open subscription

A type of subscription where users manually subscribe to content items through a basic or criteria subscription. See also forced subscription, basic subscription, and criteria subscription.

option list

A list on an Oracle Web page from which users can select an item.

original file name

The name of the native file that was checked in as the primary file.

owner

The user who has Admin permission to a folder by default. The owner is typically the user who created the folder.

page properties

The page title, page description, security group, and links for a specific Web page defined in the Web Layout Editor.

parent

A page or folder that is one level higher in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also child.

pass through

The process of storing a native file in the *weblayout* repository without converting it to a Web-viewable format. Inbound Refinery may pass through a file if it cannot be converted (for example, because the native application is not supported), if a pass-through file format is specified during check-in, or if it is not necessary to convert the file (for example, if the original file is in PDF format).

Pending status

The revision status that indicates that the revision is in a basic workflow and is waiting for approval of all revisions in the workflow.

Permission

The access that a user has to a particular security group or account. See also read permission, write permission, delete permission, and admin permission.

persistent URL

The URL (Web address) that always points to the most recent version of a content item. When a new revision is checked in, the file name of the previous revision is changed to reflect the revision number (for example, 002050~1.pdf, 002050~2.pdf, and so on), and the new revision takes on the content ID as the file name (for example, 002050.pdf). The directory location of the file remains the same if the security group, Type, and account are not changed.

personal URL

A link from the portal navigation bar to a URL (Web address) that a user accesses frequently.

plain folders

An optional feature that shows project locations as plain folder icons instead of project icons in project-specific lists.

Portal Design

A Oracle WebCenter Content Server feature that enables users to personalize their portal navigation bar.

portal navigation bar

See trays.

portal page

See guest portal page and login portal page.

post

A message that is submitted to a discussion.

primary file

The original file that is checked in to the Content Server repository. See also native file and alternate file.

privilege

See Permission.

project

The top-level unit of organization in Oracle WebCenter Content Server.

project ID

An optional feature that displays the project ID in the page title on project-specific pages.

project lead

The user who has Admin permission and serves as the main contact for a project.

Project Name

A required metadata field that specifies a unique name for a project.

propagation

See metadata propagation.

Public

A predefined security group. By default, no login is required to view Public content.

query

See search.

Query Builder Form

A form that allows queries to be built by using lists to select the metadata fields to be searched.

query expression

A statement that specifies the criteria to be matched during a search. See also search criteria.

query link

A link on a Library page that displays a list of content items that meet the specified search criteria.

query result page

See search results page.

Quick Help

A button on Oracle Web pages that provides context-sensitive help.

Quick Search

A function that enables users perform a search from the portal navigation bar. See also Advanced Search.

read permission

The permission level that allows users to perform the following tasks within a particular security group:

- viewing content
- getting a copy of content

See also write permission, delete permission, and admin permission.

refinery

See Inbound Refinery.

reject

To disapprove a revision in a workflow. See also approve.

release date

The date and time when a revision is available for searching and viewing in Content Server.

Released status

The revision status that indicates that the revision is available in Content Server.

rendition

A particular file associated with a content item, such as the primary file, alternate file, or Web-viewable file.

report

A list that contains the results of a content server database query. There are two types of reports, active report and historical report, which are built with the Web Layout Editor and accessed through the Library.

repository

See content repository.

Repository Manager

An administration application that you can use to perform these tasks:

- Manage content items (view status, delete revisions, and so on)
- Create criteria subscriptions and assign users to subscriptions
- Update and rebuild the search index

required field

A metadata field that must have a value for a content item to be checked in.

reviewer

A user who can approve or reject a workflow revision but cannot check it out for editing. See also reviewer/contributor.

reviewer/contributor

A user who can approve, reject, and check out a workflow revision for editing. See also reviewer.

reviewer/contributor step

A type of workflow step where users can approve or reject a revision and check it out for editing. See also reviewer step.

reviewer step

A type of workflow step where users can approve or reject a revision but cannot check it out for editing. See also reviewer/contributor step.

Review status

The revision status that indicates that the revision is in a workflow and is being reviewed.

revision

A new or revised version of a content item. By default, revisions are numbered sequentially starting with Revision 1, and every time the content item is checked out and checked in again, the revision number is incremented by one.

revision history

A record of all revisions for a particular content item. The files and metadata can be accessed for all previous revisions that have not been deleted.

revision status

The status of a revision in Content Server. The revision status can be Done status, Edit status, GenWWW status, Released status, Pending status, Expired status, Deleted status, or Review status.

rights

The access that a user has to any of the following administration applications:

- User Admin
- Repository Manager
- Workflow Admin
- Web Layout Editor

See also subadministrator.

role

A set of permissions for each security group. Each user is assigned one or more roles that define their access to content. There are four predefined roles:

- guest role
- contributor role
- sysmanager role
- admin role

See also Permission and security group.

route

To send a content item to other users for review using a workflow.

R permission

See read permission.

RW permission

See write permission.

RWD permission

See delete permission.

RWDA permission

See admin permission.

saved query

A link from the portal navigation bar to a particular search that a user performs frequently.

score

A search results sorting option that rates each file with a number to determine how closely it matches the full-text search criteria. The higher the score, the closer the match.

search

To retrieve a list of content items that match specified criteria.

search criteria

The metadata values and full-text words or phrases to be matched during a search. See also query expression.

search engine

Software that performs metadata and full-text searches. See also search index.

search index

A set of files that contain metadata information and the full-text indexes. The search index is created by the Indexer and is read by the search engine.

search operator

A word or symbol used in a query expression to refine the search criteria (for example, AND, OR, NOT, Substring, or Matches).

search result templates

A way of determining what content item information is listed on a search results page and how that information is displayed.

search results

A list of content items that match specified search criteria.

search results page

Standard Content Server page that displays the results of a query. Also referred to as *query result page*.

Secure

A predefined security group. By default, only the system administrator has access to this security group.

security group

A set of content items to which users are granted permission based on their roles. Each content item is assigned to a security group during check-in. There are two predefined security groups: Public and Secure.

security model

The specific configuration of security groups, roles, and accounts that is defined for an organization.

Select Member applet

A Java applet that you can use to add members to projects, folders, and content items.

self-registration

A function that enables users to create their own login credentials (user name and password).

shortcut

A link to an original content item, general discussion, or folder.

sort order

The order in which content items are displayed on a search results page. By default, search results can be sorted by release date, title, or score, and each of these options can be displayed in ascending sort order or descending sort order.

status

See revision status.

step

A sequential stage in a workflow that defines which users can review, approve, and reject a revision. There are two types of steps: reviewer step and reviewer/contributor step.

subadministrator

A user who has rights to at least one administration application. See also consumer, contributor, administrator, and system administrator.

subscribe

To request notification by e-mail when a new revision of a particular content item is checked in to the Content Server repository.

subscriber

A user who is subscribed to a content item.

subscription

A function that notifies subscribed users by e-mail when a particular content item has been revised. See also criteria subscription, basic subscription, forced subscription, and open subscription.

sub-workflow

A type of workflow that does not have an initial contribution step. A file can enter a sub-workflow only through a jump from a criteria workflow.

sysmanager role

A standard role that gives the user read permission (R) to the Public and Secure security groups, and access to the Admin Server. See also guest role, contributor role, and admin role.

system administrator

A user who has full administrative Permission and administration rights to manage the Oracle system.

system locale

A setting that specifies the language of the Content Server interface and defines how Content Server handles language-specific issues on a systemwide basis. See also user locale.

thumbnail

A miniature representation of a page or image. In Oracle WebCenter Content Server, thumbnails are created by Inbound Refinery and displayed on search result pages.

Thumbnail View

A predefined search result template showing a thumbnail image of each returned content item in a search result list.

thread

A hierarchical group of posts within a discussion. See also discussion.

title

A descriptive name for a content item.

token

A piece of Idoc Script that defines variable users in a workflow.

topic

The subject of a discussion post.

toolbar

The set of navigation links at the top of most Oracle Web pages.

trays

The customizable navigation area on the left side of most Content Server Web pages. You can optionally use menus to access similar functionality.

Type

A required metadata field that specifies which document category a content item belongs to.

undo check-out

To cancel a content item check-out without creating a new revision.

unsubscribe

To cancel a subscription to a content item.

update

To modify the metadata for a revision without checking out the content item or adding a revision.

upload applet

An optional Java applet that enables users to check in multiple content items as a single compressed zip file. See also multiple file check-in.

user

A person who has been assigned a user name and password for Oracle WebCenter Content Server.

User Admin

An administration application that you can use to manage content server users and security access.

user ID

See user name.

user information

Information about a user, such as the user name, full name, and e-mail address.

user information field

A field that you can use to define user information on the User Profile page.

user locale

A setting that specifies the language of the Content Server interface and defines how Content Server handles language-specific issues for an individual user. See also system locale.

user login

A user name and password used to gain access to Oracle WebCenter Content Server.

user name

The name of a user, as recognized by Oracle WebCenter Content Server (for example, `mjohnson`).

User Profile

Personal information about a user, such as the user name, full name, and e-mail address. User information can be changed by an administrator through the User Admin administration application, or by the user on the User Profile page.

user type

See authorization type.

vault

The Content Server directory where native files are stored.

WebDAV (Web-Based Distributed Authoring and Versioning)

A protocol that provides a way to remotely author and manage content using clients that support WebDAV. For example, you can use Microsoft Windows Explorer to check in, check out, and modify content in the Oracle repository rather than using Oracle's Web browser interface.

Web folder

A WebDAV feature that displays a Oracle WebCenter Content Server project or folder in the Explorer view of the browser.

weblayout

The Content Server directory where Web-viewable files are stored.

Web Layout Editor

An administration application that you can use to create the Library hierarchy, define reports, modify search result pages, and update the portal page.

Web-viewable file

A file in a format that can be viewed using a Web browser, such as PDF or HTML.

workflow

The process that routes a file for review and approval before it is released to Content Server. Users are notified by e-mail when they have a file to review. There are three types of workflows: basic workflow, criteria workflow, and sub-workflow.

Workflow Admin

An administration application that you can use to set up and manage workflows.

work in progress

A revision that is in GenWWW status or Done status.

write permission

The permission level that allows users to perform the following tasks within a particular security group:

- Viewing content
- Checking in content
- Checking out content
- Getting a copy of content

See also read permission, delete permission, and admin permission.

Index

Symbols

A

B

C

D

E

F

G

H

I

J

L

M

N

O

P

Q

R

T

U

V

W

Z