

**Content Folios User Guide**  
10g Release 3 (10.1.3.3.2)

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# CONTENT FOLIOS

## OVERVIEW

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Content Folios provides a quick and effective way to assemble, track, and access logical groupings of multiple content items from within the secure environment of Content Server. For example, all items relevant to an upcoming brochure, such as images, logos, legal disclosures, and ad copy, can be assembled and downloaded to be sent for print. 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 need to be associated and tracked with release waivers and narration text. All this can be done with Content Folios.

This section contains the following topics:

- ❖ [About This Guide](#) (page 1-2)
- ❖ [Audience](#) (page 1-2)
- ❖ [Conventions](#) (page 1-2)
- ❖ [About Content Folios](#) (page 1-3)

## ABOUT THIS GUIDE

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This guide describes the purpose of Oracle Content Folios and how to use them. It lists pages and functions added to Content Server interface, and details each added function and each item on the new pages. Additionally, it gives examples of ways in which Folios can be used.

## AUDIENCE

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This guide is meant for all users of Content Server on which Content Folios is installed. Consumers of content may search for and view folios, but not edit them. Content contributors may edit folio structure and content within the nodes and slots to which they have security access.

## CONVENTIONS

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The following conventions are used throughout this guide:

- ❖ The notation `<Install_Dir>/` is used to refer to the location on your system where the content server instance is installed.
- ❖ Forward slashes (`/`) are used to separate the directory levels in a path name. A forward slash will always appear after the end of a directory name.
- ❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.



# SUPPORT

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The Oracle family of products is backed by a full range of support options to meet every business need. The support website can be found at <http://metalink.oracle.com>. Before contacting support, refer to the *Content Server Troubleshooting Guide* for detailed information.

The service philosophy is to keep your Oracle environment fully operational by providing the best information and solutions available. The Oracle product support team consists of highly trained product engineers who excel at resolving complex technical issues.



**Important:** The support options that are available for specific systems may vary, depending on the applicable service and maintenance agreements. Please refer to your contract for the support details for your Oracle system.

## ABOUT CONTENT FOLIOS

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This section defines what a folio is and how it is used.

[What is a Folio](#) (page 1-3)

[When to Use a Folio](#) (page 1-6)

### What is a Folio

---

Technically, a content folio is an XML file checked into 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 in which content stored in Content Server can be structured. [Simple folios](#) are a flat container, while [advanced folios](#) can nest content in a hierarchy within folders. In an advanced folio, the hierarchy may be established prior to assembling content items, or it may be created during or subsequent to assembling the items. Existing folios can have content added to them, or can be locked so that no changes can be made. Content items can be added to a simple folio by searching Content Server, and to an advanced folio by checking new items into the content server repository or by searching for content that has previously been checked in, all through the folio interface. An advanced folio can even contain hyperlinks to outside resources such as web sites or shared network drives.

## The Folio Structure

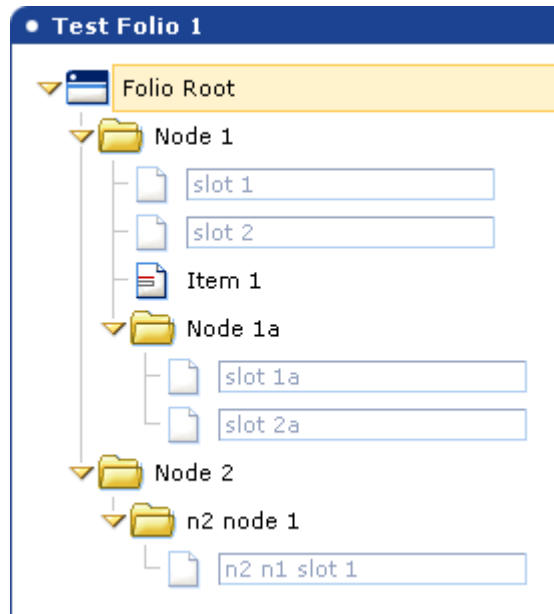
Within Content Server, a folio is displayed starting at the root, or top level. Each simple folio contains content items displayed in a table similar to a standard search results page. Content is added to a simple folio by searching through Content Server.

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 1-1** Simple Folio Structure

Simple Folio Structure Example - Root Node					
Folio Elements					
	Name	Description	Created	Modified	Content Item
	Item 1	This is the first item.	10/10/2007	10/10/2007	CS003_000022
	Item 2	This is the second item.	10/10/2007	10/10/2007	CS003_000023
	Item 3	This item is being reordered by dragging and dropping.			
	Item 4	This is the fourth item.	10/10/2007	10/10/2007	CS003_000025

Figure 1-2 Advanced Folio Structure



## When to Use a Folio

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A folio should be used 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. This could be if content needs to be collected for a vendor, if content is associated with one or more projects, or any other time multiple content items need to be grouped in a hierarchy.

## Structured Organization of Content

Folios can be used for organization. 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. A folio template is created 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 a presentation is being developed for a new client, the selected template is used to create a folio that is routed 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.

## Managing Records and Reports

Folios are useful when a group of documents needs to be created and reviewed 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 need to 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. Once certain crucial information is collected and entered, additional information is contributed by other agents. Once all the required parts of the report are contributed, 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 need to 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 will not 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 will see all *Top Secret* and *Secret* documents in the folio. At any stage in the creation or workflow process, an authorized agent is able to easily collect all the items in the folio and download them as a compressed file, or compile them as a single PDF file for easy printing.

## Managing Digital Assets and Production

Often catalogs, technical manuals, and other collateral material require many separate files that need to 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 into Content Server, a single item can be added to each of the folios. When all items are checked in to a folio, the folio is

continues on in the workflow to the layout designers, who create the flyer and catalog designs. Once each folio is done, it is locked and future flyers and catalogs may be started by copying these or beginning fresh using the appropriate template.

## **Custom Uses**

The above examples are only a few ways in which Oracle Content Folios can be used. Additional uses depend on your business needs. If you would like help implementing Content Folios within your organization, contact Oracle Consulting Services.

# WORKING WITH FOLIOS

## OVERVIEW

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Like any other item in Content Server, folios are created and checked in. Associated metadata can be searched for and reviewed. Revisions can be tracked by making snapshots of a folio, and folios can be locked or unlocked to control whether changes can be made.

This section covers the following topics:

- ❖ [Creating a Simple Folio](#) (page 2-2)
- ❖ [Creating an Advanced Folio](#) (page 2-3)
- ❖ [Modifying Folio Structure and Content](#) (page 2-3)
- ❖ [Taking Snapshots](#) (page 2-12)
- ❖ [Locking and Unlocking Folios](#) (page 2-12)
- ❖ [Downloading Folio Renditions](#) (page 2-13)
- ❖ [Finding Existing Folios](#) (page 2-13)
- ❖ [Viewing Folios](#) (page 2-14)
- ❖ [Viewing Folio Information](#) (page 2-14)
- ❖ [Subscribing to Folios](#) (page 2-14)
- ❖ [Using Content Baskets](#) (page 2-15)
- ❖ [Understanding Folio Workflows](#) (page 2-17)

## CREATING A SIMPLE FOLIO

---

A simple folio creates a flat folio with no additional hierarchy. The content of a simple folio is displayed in a table, similar to a search results page. A simple folio can be converted to an advanced folio later if additional structure is required, however an advanced folio cannot be converted to a simple folio.



**Note:** 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](#) (page 3-4) 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 the section on the [Element Info Tray](#) (page 3-10) of an advanced folio, and the section [Updating Simple Folio Element Information](#) (page 2-5).

To create a simple folio once you have logged in to Content Server, do these steps:

1. Open the Content Management tray in the tray area.
2. Click **New Folio**. The [Pick Folio Type Page](#) is displayed.
3. Accept the default **Simple Folio**.
4. Click **Load folio**. The [Edit Simple Folio Page](#) is displayed.
5. Select **Save folio** from the Actions menu. The [Set Folio Profile Page](#) is displayed.



**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 will be lost.

6. Choose the profile to be used with the folio, if any, and click **Next**. The [Folio Check In Page](#) is displayed.
7. Enter the required information and click **Check in**. The [Folio Check In Confirmation Page](#) is displayed.
8. Select how to proceed and click **Finish**. Options are:
  - Continue editing the folio to add content. The [Edit Folio Page](#) is displayed.
  - View content information for the folio. The Content Server content information page for the folio is displayed.
  - View the folio. The [View Folio Page](#) is displayed.



## CREATING AN ADVANCED FOLIO

---

An advanced folio is a folio that allows for a hierarchical structure. The structure may be predefined in a template by the system administrator, or if no template is associated, it may be modified dynamically as the folio is created and edited. The structure of a template-based folio may or may not be modified later, depending on the template.

To create an advanced folio once you have logged in to Content Server, do these steps:

1. Open the Content Management tray in the tray area.
2. Click **New Folio**. The [Pick Folio Type Page](#) is displayed.
3. Select **Advanced Folio** and select a template if needed.
4. Click **Load folio**. If a content item associated with a selected folio template is set to be cloned, then you are prompted to first check in the folio, and the [Set Folio Profile Page](#) is displayed, and you skip to step 6. If not, The [Edit Folio Page](#) is displayed.
5. Select **Save folio** from the Actions menu. The [Set Folio Profile Page](#) is displayed.



**Important:** You must save the folio on the Edit Folio 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 will be lost.

6. Choose the profile to be used with the folio, if any, and click **Next**. The [Folio Check In Page](#) is displayed.
7. Enter the required information and click **Check in**. The [Folio Check In Confirmation Page](#) is displayed.
8. Select how to proceed and click **Finish**. Options are:
  - Continue editing the folio to add structure or content. The [Edit Folio Page](#) is displayed.
  - View content information for the folio. The Content Server content information page for the folio is displayed.
  - View the folio. The [View Folio Page](#) is displayed.

## MODIFYING FOLIO STRUCTURE AND CONTENT

---

[Simple folios](#) have a flat structure displayed as a table. The order of the content is displayed in the table and can be changed using the [Edit Simple Folio Page](#). Content can be added or deleted, but simple folios do not have a hierarchical structure. Structure can be

added to a simple folio by converting it to an advanced folio, but once done, it cannot be converted back to a simple folio.

[Advanced folios](#) have a hierarchical structure. If a predefined template was selected when the folio was created, the folio may or may not be modified, depending on the properties set when the template was created by the system administrator. If no template was selected when the folio was created, the folio has a single, root node. Structure can be defined and modified later. Nodes, slots, and content items can be added, deleted, modified and moved within an advanced folio's structure, and the associated properties set using the [Edit Folio Page](#).

This section covers the following topics:

- ❖ [Editing a Simple Folio](#) (page 2-4)
- ❖ [Editing an Advanced Folio](#) (page 2-6)


## Editing a Simple Folio

---

Simple folios have a flat structure. Items can be added, deleted, or reordered within a simple folio. Unlike advanced folios, items added to a simple folio must already be checked in to Content Server.

### Adding Items to a Simple Folio

Items can be added to a simple folio using the [Edit Simple Folio Page](#) (page 3-4). To add content to a simple folio, do these steps:

1. On the [Edit Simple Folio Page](#), click the **Add** icon  in the table heading above the thumbnail column. A search profile page is displayed.
2. Select a search profile, if necessary, and click **Next**. The appropriate Content Server search form is displayed.
3. Enter your search criteria and click **Search**. A search results page is displayed.
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. Select **Save changes** from the **Actions** menu to save the content to the folio.



**Important:** You must save the folio before navigating away from it. If you do not save the folio, any changes to it will be lost.


## Deleting Items from a Simple Folio

Items can be deleted from a simple folio using the [Edit Simple Folio Page](#) (page 3-4). To delete content from a simple folio, do these steps:

1. Select the item to be removed from the folio on the [Edit Simple Folio Page](#) by clicking once on the row of the item to be deleted. The row is highlighted.



**Tech Tip:** Multiple sequential items can be selected by holding the shift key down while clicking the first and last items to be selected. Multiple non-sequential items can be selected by holding the control key down while clicking each item to be selected.

2. Click the **Delete** 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. Select **Save changes** from the **Actions** menu to save the content to the folio.



**Important:** You must save the folio before navigating away from it. If you do not save the folio, any changes to it will be lost.

## Reordering Items in a Simple Folio

To reorder items in a simple folio, do these steps:

1. click and hold on the row you want to move and drag it to the new position, then release.
2. Select **Save changes** from the **Actions** menu to save the content to the folio.

## Updating Simple Folio Element Information

Although a simple folio creates a flat folio with no additional hierarchy, the content of a simple folio is associated with the folio using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the table of the [Edit Simple Folio Page](#) (page 3-4). This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.

To update the element information in a simple folio, do these steps:

1. On the [Edit Simple Folio Page](#), double-click the information you want to update. An editable text field is displayed above the information. By default, only the name and description can be updated.

2. Modify the information and press the **Enter** key, or click anywhere outside of the text field. The changes are applied.
3. Select **Save changes** from the page **Actions** menu. The element information is updated.

## Editing an Advanced Folio

---


An advanced folio is a folio that allows for a hierarchical structure. Like a simple folio, items can be added, deleted, or reordered within an advanced folio. Unlike simple folios, items can be nested in folders (nodes), empty slots can be created as placeholders for content items, and items can be added to an advanced folio by searching Content Server for existing content, or by checking in new content through the folio interface.

The structure and content associated with an advanced folio is defined using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the [Element Info Tray](#) (page 3-10) area of the [Edit Folio Page](#) (page 3-7). This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.





**Note:** 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.

## Adding and Organizing Nodes and Slots

Nodes and slots can be added to, moved within, and removed from folios using the [Edit Folio Page](#) (page 3-7). 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](#) (page 3-13), and drag-and-drop nodes, slots, and items within the folio hierarchy area to reorganize them. Additionally, right-clicking on a node, slot, or item in the folio hierarchy section displays 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, perform these steps:

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. This can be the root node () , or a node within another node.

3. Right-click on the selected node or click the contextual menu icon () in the Element Info area to open an element contextual menu.
4. Select **Create Node** or **Create Slot** from the contextual menu. A new node or slot is displayed.
5. Select **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 will be lost.

## 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 content 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 Content Server for existing content, and then dragging the items into the folio hierarchy.  
See [Adding Items from the Source Items Area](#) (page 2-8).
- ❖ By displaying a content basket in the Source Items area on the [Edit Folio Page](#), and then dragging the items into the folio hierarchy.  
See [Adding Items from the Source Items Area](#) (page 2-8).
- ❖ By selecting *Insert Item by Search* from the Element Info contextual menu to search for existing Content Server content and add it to the folio.  
See [Inserting an Existing Item Using a Contextual Menu](#) (page 2-8).
- ❖ By selecting *Insert Item by Checkin* from the Element Info contextual menu to check a new content item into Content Server and add it to the folio.  
See [Inserting an New Item Using a Contextual Menu](#) (page 2-9).
- ❖ By using a search results page to add existing content to the Source Items area of a new or existing advanced folio.  
See [Adding Items from a Search Results Page](#) (page 2-10).
- ❖ By publishing content gathered in a content basket to a new folio created during the publishing process.  
See [Adding Items from a Content Basket](#) (page 2-11).

## Adding Items from the Source Items Area

The Source Items area of an [Edit Folio Page](#) displays content already checked into Content Server. The content may be collected in a content 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 using the Source Items area, perform these steps:

1. Navigate to the [Edit Folio Page](#) of the folio to which content is being added.
2. Select 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. Select **Save changes** from the [Edit Folio Page](#) Actions menu.



**Important:** If you do not save changes before navigating away from the folio, any changes will be lost.

If no items have been collected into a content 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, perform these steps:

1. Navigate to the [Edit Folio Page](#) of the folio to which content is being added.
2. Click **Search** in the Source Items area. The Search for Items page is displayed.
3. Select a profile to use for searching, if any, and click **Next**. A search form is displayed.
4. Choose the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page is displayed.
5. Select the items to collect by enabling the check box next to the item or items in the search results, then click **Next**. The items are listed in the Source Items area.
6. Select **Save changes** from the [Edit Folio Page](#) Actions menu.



**Note:** Items cannot be selected across multiple pages of search results.

## Inserting an Existing Item Using a Contextual Menu

Items that have already been checked into Content Server can be searched for and inserted directly into a folio node or slot by using *Insert Item by Search* in the Element Info

contextual menu. This contextual menu is also available by right-clicking the appropriate node or slot.

To search for and insert a content item directly into a folio node or slot, perform these steps:

1. Navigate to the [Edit Folio Page](#) of the folio to which content is being added.
2. Select the node or slot into which the content will go.
3. Open the Element Info contextual menu by either right-clicking on the node or slot, or by clicking the contextual menu (📄) in the Element Info area. The Element Info contextual menu is displayed.
4. Select **Insert Item by Search**. The Search for Item page is displayed.
5. Choose the criteria appropriate to the item for which you are searching, and click **Search**. The Content Listing page is displayed.
6. Click **Select** next to the item to insert. The item is inserted into the folio.
7. Select **Save changes** from the [Edit Folio Page](#) Actions menu.

## Inserting an New Item Using a Contextual Menu

New items that have not yet been checked into Content Server can be inserted directly into a folio node or slot by using *Insert Item by Check In* in the Element Info contextual menu. This contextual menu is also available by right-clicking the appropriate node or slot.

To check in a content item and insert it directly into a folio node or slot, perform these steps:

1. Navigate to the [Edit Folio Page](#) of the folio to which content is being added.
2. Select the node or slot into which the content will go.
3. Open the Element Info contextual menu by either right-clicking on the node or slot, or by clicking the contextual menu (📄) in the Element Info area. The Element Info contextual menu is displayed.
4. Select **Insert Item by Check In**. The Item Check In page is displayed.
5. Fill in the appropriate criteria for the item you are checking in, and click **Check In**. A check in confirmation page is displayed.
6. Click **Add Item to Folio**. The item is inserted into the folio.
7. Select **Save changes** from the [Edit Folio Page](#) Actions menu.

## 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. Once listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. See [Adding Items from the Source Items Area](#) (page 2-8) for more information.

To add items to a new folio, perform these steps:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the folio.
2. Select **Add items to folio** from the table actions menu above the check boxes. The Add Items To Folio page is displayed.
3. Ensure **New folio** is enabled and click **Next**. The Pick Folio Type page is displayed.
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. See [Edit Simple Folio Page](#) (page 3-4) for more information.
  - Selecting Advanced Folio enables the Folio Template choice list, providing access to folio templates with structure predefined by a system administrator. See [Edit Folio Page](#) (page 3-7) for more information.
5. Click **Load folio**. If Simple Folio was selected in step 4, then the [Edit Simple Folio Page](#) (page 3-4) is displayed with the selected elements listed. If Advanced Folio was selected in step 4, then the [Edit Folio Page](#) is displayed with the selected content items inserted into the root node of the advanced folio.
6. Select **Save changes** from the [Edit Folio Page](#) Actions menu.



**Important:** If you do not save changes before navigating away from the folio, any changes will be lost.


To add items to an existing folio, perform these steps:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the folio.
2. Select **Add items to folio** from the table actions menu above the check boxes. The Add Items To Folio page is displayed.
3. Enable **Existing folio** and click **Next**. The Select Folio Profile page is displayed.
4. Select the appropriate profile, if any, and click **Next**. The Search for Existing Folio page is displayed.



5. Choose the criteria appropriate to the folio for which you are searching, and click **Search**. The Folio Listing page is displayed.
6. Click **Select** by the folio to which the content items are to be added. The [Edit Folio Page](#) of the selected folio is displayed, with the content items listed in the Source Items area. Once listed in the Source Items area, content can be added to the folio by dragging it to the appropriate node or slot. See [Adding Items from the Source Items Area](#) (page 2-8) for more information.
7. Select **Save changes** from the [Edit Folio Page](#) Actions menu.

## Adding Items from a Content Basket

Content baskets are used to manage collected items. Items in content baskets are displayed in the Source Items area of a folio when a content basket is selected from the Source Items contextual menu (). Once displayed in the Source Items area, content in a content basket can be added to the folio by dragging it to the appropriate node or slot. See [Adding Items from the Source Items Area](#) (page 2-8) for more information.

Additionally, items in a content basket can be published to a new folio from the Content Basket page. To publish content in a content basket, perform these steps:

1. Open **My Baskets** under the **My Content Server** tray and select the content basket that contains the items to be published to a new folio. The content basket page for that basket is displayed.
2. Select **Publish to folio** from the page Actions menu. The [Edit Folio Page](#) is displayed with the published items inserted at the root level of a new folio.
3. Select **Save folio** from the [Edit Folio Page](#) Actions menu.
4. Continue with step 6 of the section [Creating an Advanced Folio](#) (page 2-3).



**Important:** If you do not save changes before navigating away from the folio, any changes will be lost.

## Updating Advanced Folio Element Information

The content of an advanced folio is associated with the folio using elements in an XML file stored in Content Server. It is the element information articulated in the XML file defining the folio that is displayed in the [Element Info Tray](#) (page 3-10). This element information is unique to the folio and can be changed in the folio without affecting the content item's metadata, or the information in any other folio with which a content item may be associated.

To update the element information in an advanced folio, do these steps:

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. Select **Save changes** from the page **Actions** menu. The element information is updated.

## TAKING SNAPSHOTS

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A folio's hierarchy is defined in an [XML file](#) checked into Content Server as a content item. Like any content item in Content Server, 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 in Content Server, revision history of the folio is accessed from the folio content information page.

To take a snapshot of a folio, do these steps:

1. Navigate to the [Edit Folio Page](#) of the folio.
2. Select **Actions—Create snapshot**. The Edit Folio page refreshes.



**Tech Tip:** You can verify that a new revision has been created by selecting **Actions—Content Item info** from the [Edit Folio Page](#) and reviewing the revision history on the Content Information page.

## LOCKING AND UNLOCKING FOLIOS

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Locking a folio takes a [snapshot](#) of a folio and locks it, preventing it from being edited. Once 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, do these steps:

1. Navigate to the [Edit Folio Page](#) of the folio.
2. Select **Actions—Lock folio**. The View Folio page is displayed.

If required, a locked folio can be unlocked for additional edits. Unlocking a folio duplicates the locked folios hierarchy as a new revision available for editing.

To unlock a folio, do these steps:

1. Navigate to the [View Folio Page](#) of the folio.
2. Select **Actions—Create editable revision**. The Edit Folio page is displayed.

## DOWNLOADING FOLIO RENDITIONS

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Once content in Content Server is associated in a folio, renditions of the associated content can be made. Renditions are defined and made available by your system administrator, and can be in a variety of forms. For example, a zip rendition could be a single compressed file containing all folio content to which you have access. Or a PDF rendition could assemble all folio content to which you have access into a single PDF file suitable for printing. Additional renditions can be defined to meet your organizations needs.

To download renditions of a folio, do these steps:


1. Navigate to the [Edit Folio Page](#) of the folio.
2. Select the rendition you require from the **Renderers** menu. A dialog box asking for the download location is displayed.



**Important:** A PDF rendition is only possible if the content associated with the folio has a PDF web-viewable file. This means that either the associated content item is a PDF file, or that you system administrator has set up PDF Converter to generate a PDF version. If the folio is associated with items that do not have a PDF version as well as items that do, only the items with PDF versions become part of the PDF rendition.

## FINDING EXISTING FOLIOS

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Because a folio is managed by Content Server as a single XML file, folios can be found 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. Clicking the icon displays the folio. If you can edit the folio, the [Edit Folio Page](#) is displayed, otherwise, the [View Folio Page](#) is displayed.

## VIEWING FOLIOS


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Folios can be viewed in the following ways:

- ❖ Using the [Edit Folio Page](#), which displays the folio hierarchy and allows the folio to be edited, provided you have the rights to do so
- ❖ Using the [View Folio Page](#), which by default shows the folio hierarchy but cannot be edited. Additional views can be defined by your system administrator, and may not resemble the default folder hierarchy view.
- ❖ Viewing the native XML file (file extension .xcsr ) from a content information page link.

## VIEWING FOLIO INFORMATION

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Folio information, including [revision history](#), is displayed on the content information page of the [XML file](#) checked into Content Server. It is accessed by clicking the information icon (  ) next to a folio in the Actions column on a search results page, or by selecting **Content Item info** from the **Actions** menu on the [Edit Simple Folio Page](#) (page 3-4), [Edit Folio Page](#) (page 3-7), or [View Folio Page](#) (page 3-18).

## SUBSCRIBING TO FOLIOS

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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](#) (page 3-23).

To subscribe to changes made to a folio or folio items, do these steps:

1. Select **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](#) (page 3-23) is displayed.
2. Select one or more of the actions for which to be notified by enabling the check box:
  - Child update—This will notify on any change to content linked to by this folio
  - Add—This will notify when anything is added to this folio
  - Modify—This will notify when attributes are modified in this folio

- Delete—This will notify when anything is deleted from this folio
3. Click **Subscribe**. The standard Content Server content information page for the folio is displayed.

## USING CONTENT BASKETS

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Content baskets are a useful way to collect items checked into Content Server. Content is added to a content basket from the search results page. Once collected in a content basket, items can be published to new folios or easily accessed from within existing folios in the [Source Items Tray](#) (page 3-13) of the [Edit Folio Page](#) (page 3-7). Multiple baskets can be created using the [Manage Content Baskets Page](#) (page 3-19) to help organize content by project, author, date, type, or any other way that you find useful.



**Note:** Content added to content baskets still resides in the Content Server repository. It does not change physical locations. Instead, the metadata for items in a content basket is updated to reflect the basket or baskets to which a content item is added. Clicking on a content basket link executes a search for the metadata reflecting that content basket, and returns a search result page listing the content items. This allows content to be collected in more than one basket.

## Managing Content Baskets

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Content baskets are created and deleted using the [Manage Content Baskets Page](#). Multiple baskets can be created, but only one basket can be active at a time. Only the active basket can have content added to it.

To create a content basket, do these steps:

1. Click **My Baskets** under the **My Content Server** tray. The Manage content baskets page is displayed.
2. Click **Append basket**. A new field is displayed on the page.
3. Enter a name for the basket in the new field.
4. Enable **Active** next to the new basket to make it the active basket if desired, 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 content basket, do these steps:

1. Click **My Baskets** under the **My Content Server** tray. The Manage content baskets page is displayed.
2. Enable **Delete** next to the basket to delete and click **Update**. The basket is removed from the Manage content baskets page and from under My Baskets in the My Content Server tray.


## Working With Content Baskets

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Multiple content baskets can be created 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. Content can be moved between baskets, copied into another basket, or reordered within a basket.

### Setting the Active Basket

To make a basket active, do these steps:

1. Click **My Baskets** under the **My Content Server** tray. The Manage content baskets page is displayed.
2. Enable **Active** next to the desired 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.

To add content to the active basket, do these steps:

1. From a search results page, select content by enabling the check box next to the item or items to be added to the active basket.
2. Select **Add to active basket** from the table actions menu above the check boxes. The Home page is displayed.
3. You can verify that the content is added to the active basket by opening **My Baskets** in the **My Content Server** tray and clicking the active basket icon (). The active basket page is displayed.

### Moving and Copying Content Items

If you inadvertently add content to the wrong basket and want to move it, or if you want 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 from one basket to another, do these steps:

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 content to move or copy by enabling the check box next to the item or items.
3. Using the table Actions menu, select **Actions—Move selected items** to move content, or **Actions—Copy selected items** to copy content. The Move Basket Items page or Copy Basket Items page is displayed.
4. Click the basket to which the items are to be moved or copied. The Home page is displayed.

## Removing Content Items

Items can be removed from any content basket. To remove content from a basket, do these steps:

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 content to remove by enabling the check box next to the item or items.
3. Using the table Actions menu, select **Actions—Remove selected items**. The Home page is displayed.

# UNDERSTANDING FOLIO WORKFLOWS

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When working with folios in a workflow, it is important to remember that technically a [folio](#) is an XML file checked into Content Server that lists associated content in a meaningful way. When a folio is routed in a workflow, it is the XML file that is being routed, so it is the structure of the folio that is being reviewed and edited, not the content items associated with the folio. They are not routed.

Think of the folio as a list of items. When a folio is routed in a workflow, you are being asked to review the list of items, and possibly update, add to, or rearrange them. Looking at the example used in the section [Structured Organization of Content](#) (page 1-6), a company used a template to create a folio to include information for a sales presentation. The new folio already 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 being 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 of Content Server any number of times, but the folio won't move on in the workflow until content is associated with the specified empty slots. Once 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.



# CONTENT FOLIO PAGES

## OVERVIEW

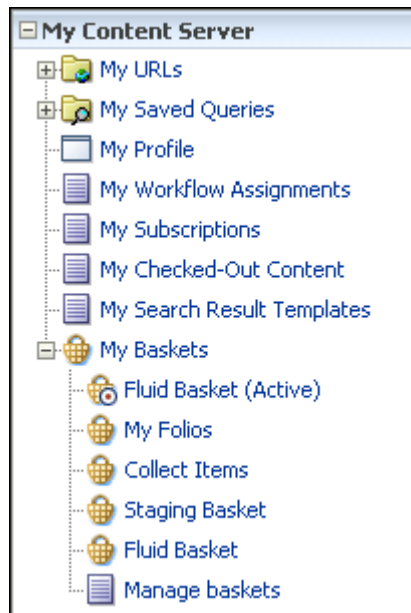
---

This section covers the following pages and contextual menus added to Content Server when Folios is installed.

- ❖ [My Content Server Tray: My Baskets](#) (page 3-2)
- ❖ [Content Management Tray: New Folio](#) (page 3-3)
- ❖ [Pick Folio Type Page](#) (page 3-3)
- ❖ [Edit Simple Folio Page](#) (page 3-4)
- ❖ [Edit Folio Page](#) (page 3-7)
- ❖ [Set Folio Profile Page](#) (page 3-16)
- ❖ [Folio Check In Page](#) (page 3-16)
- ❖ [Folio Check In Confirmation Page](#) (page 3-17)
- ❖ [View Folio Page](#) (page 3-18)
- ❖ [Manage Content Baskets Page](#) (page 3-19)
- ❖ [Move/Copy Basket Items Page](#) (page 3-21)

## MY CONTENT SERVER TRAY: MY BASKETS

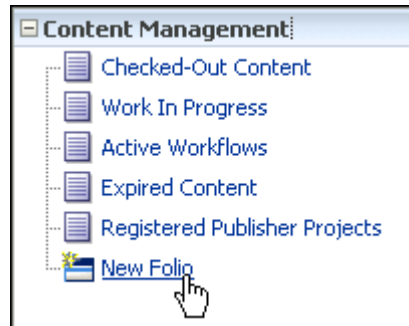
---



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 or not you have specifically added a content item to a basket.

Content baskets are displayed under the My Baskets folder on the My Content Server tray, and also under the [Source Items Tray](#) (page 3-13) of the [Edit Folio Page](#) (page 3-7). Clicking **My Baskets** or **Manage baskets** displays the [Manage Content Baskets Page](#) (page 3-19), where baskets can be added, modified, deleted, or made active.

## CONTENT MANAGEMENT TRAY: NEW FOLIO



New folios are created using the **New Folio** link on the Content Management tray. Clicking New Folio displays the [Manage Content Baskets Page](#) (page 3-19).

## PICK FOLIO TYPE PAGE

**Pick Folio Type**

A Simple Folio is a flat, unstructured container for collecting content items. The Advanced Folio option provides additional functionality and allows the collection space to be organized into a folder-like hierarchy. The structure of an Advanced Folio can be user-defined, or based upon a pre-defined template..

**Simple Folio**

**Advanced Folio**

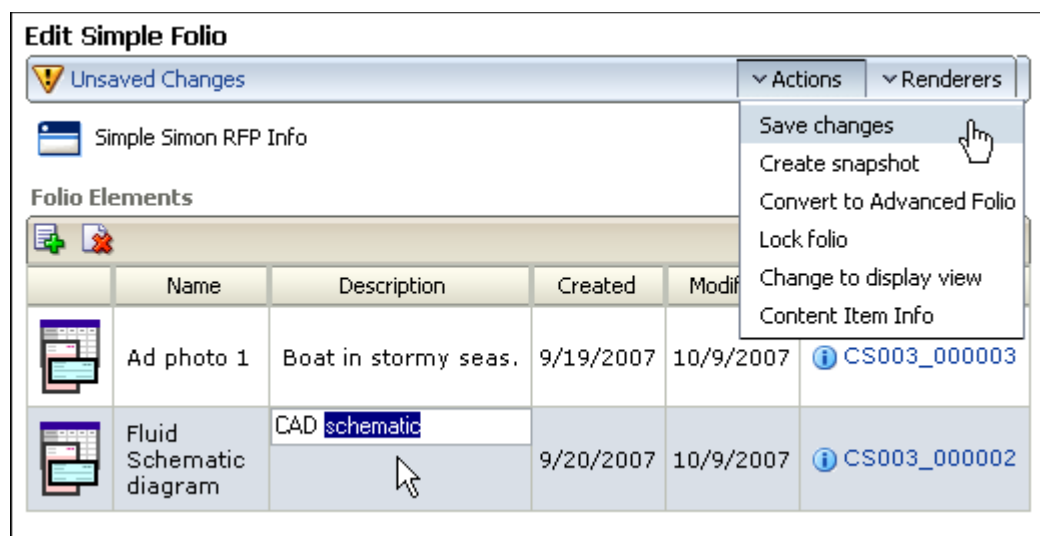
Folio Template:  ▼

The Pick Folio Type page is accessed by clicking **New Folio** in the Content Management tray. It is used to choose the type of folio to create.

Form Element	Description
Load Folio	Displays the <a href="#">Edit Simple Folio Page</a> (page 3-4) or <a href="#">Edit Folio Page</a> (page 3-7) for the type of folio selected.


Form Element	Description
Simple Folio	A simple folio is a folio with no structure established. Items in a simple folio are displayed as a table on the <a href="#">Edit Simple Folio Page</a> (page 3-4), and can be reordered in the table, but not nested in a hierarchy unless the simple folio is converted to an advanced folio. If a simple folio is converted to an advanced folio, it cannot be converted 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 may or may not be modified later, depending on the template. If no template is selected, then the folio is created with no structure established. When this option is selected, a folio is begun with a root level node only, and the structure can be modified later. An advanced folio cannot be converted to a simple folio.
Folio Template	Lists the templates available on which the new folio is based.

## 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

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.

Item	Description
Changes Notification	<p>Displays the status of any changes made to the folio.</p> <p><b>Figure 3-1</b> Unsaved Changes and Changes Saved graphic</p> 
Actions menu	See <a href="#">Actions Menu</a> (page 3-14)
Renderers menu	<a href="#">Renderers Menu</a> (page 3-15)
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. Items are selected by clicking the item row.
Thumbnail column	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. Clicking the thumbnail displays the Content Server 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 is populated with the content item title metadata from Content Server. After it is associated with a folio, the name element information can be edited independently for each folio with which a content item is associated. For more information, see <a href="#">Updating Simple Folio Element Information</a> (page 2-5).

Item	Description
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 it is associated with a folio, the description element information can be edited independently for each folio with which a content item is associated. For more information, see <a href="#">Updating Simple Folio Element Information</a> (page 2-5).
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 is populated with the creation date from the content item metadata from Content Server.
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 is populated with the current date. The modification date is updated 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. Clicking the Content ID displays the web-viewable of a content item. Clicking the information icon displays the standard Content Server content information page for the item.

# EDIT FOLIO PAGE

The screenshot displays the 'Edit Folio' application interface. At the top, there is a status bar with 'Unsaved Changes' and two dropdown menus for 'Actions' and 'Renderers'. The main area is divided into three panels:

- Fluid Dynamics (Tree View):** Shows a hierarchical structure starting with 'Folio Root'. It includes folders for 'Agenda', 'Fluid Information' (containing 'Fluid Schematic' and 'Meeting Minutes'), 'Compliance Documentation' (containing 'Specification Approval(Empty)', 'First Agency Approval(Empty)', and 'Materials Inspection(Empty)'), and 'Test Plans' (containing 'Process Meeting').
- Element Info:** Displays details for the selected 'Process Meeting' item. It shows:
  - Content ID: CS003\_000012
  - Author: sysadmin
  - Links: View Content Info, Native File, Web Viewable Rendition
  - Name: Process Meeting
  - Description: undefined slot
  - Content id: CS003\_000012
  - Create date: Thu Sep 27 11:25:20 CDT 2007
  - Last modified: Thu Sep 27 11:25:20 CDT 2007
  - Attributes: A list of boolean attributes such as 'Allow empty: TRUE', 'Lock content: FALSE', 'Moveable: TRUE', 'Removable: TRUE', 'Allow external: TRUE', 'Restrict formats', 'Allow folio: TRUE', and 'Content profile'.
- Source Items:** Shows a list of items available for insertion, including 'Fluid Basket' and 'My Folios'. A context menu is open over this panel with options: 'Collect Items', 'Fluid Basket', and 'My Folios'.

Two context menus are also visible:

- Over the 'Process Meeting' item in the tree view: 'Insert Selected Item', 'Insert Item by Search', 'Insert Item by Checkin', 'Remove Content Item', 'Insert Hypertext', 'Create Node', 'Create Slot', 'Cut', 'Copy', 'Paste', 'Delete'.
- Over the 'Process Meeting' item in the 'Element Info' panel: 'Save changes', 'Create snapshot', 'Seal folio', 'Change to display view', 'Content Item Info'.

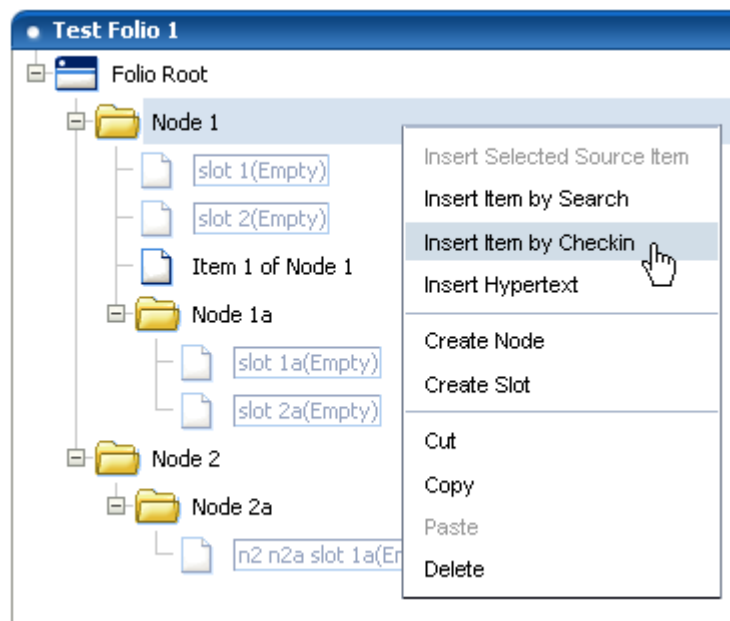
Clicking the content ID or the folio icon in the Actions column of a search result displays the Edit Folio page. From the Edit Folio page, you can add nodes, slots, and items to the

folio, find information regarding 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. Clicking the heading of a tray expands or collapses the tray. The main areas on the Edit Folio page are:

- ❖ [Folio Structure Tray](#) (page 3-8)
- ❖ [Element Info Tray](#) (page 3-10)
- ❖ [Source Items Tray](#) (page 3-13)
- ❖ [Actions Menu](#) (page 3-14)
- ❖ [Renderers Menu](#) (page 3-15)

## Folio Structure Tray

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The left side of the Edit Folio page is the folio structure section. It displays the nodes, slots, and items that make up the folio hierarchy. Right-clicking within the folio structure area displays a contextual menu for performing a variety of tasks, such as adding and deleting nodes and slots, or inserting content items.

### Folio Structure Contextual Menu

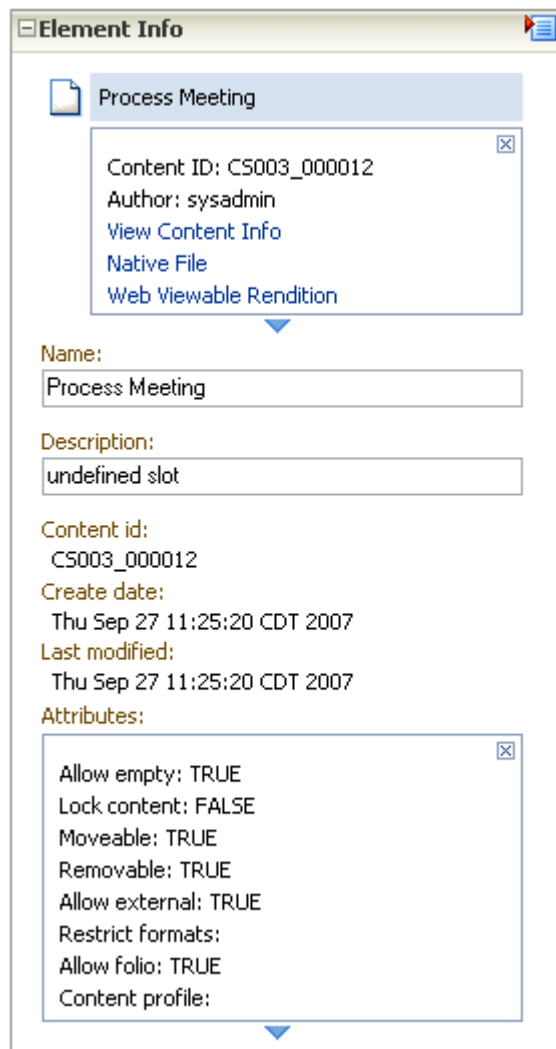
The following options are available in the folio structure section contextual menu.



Item	Description
Insert Selected Source Item	Inserts the item in the folio slot with the selected item from the <a href="#">Source Items Tray</a> (page 3-13). 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 into Content Server 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

## Element Info Tray



The first tray on the right side of the page is the element info tray. The element information is what is articulated in the XML file checked into Content Server that defines the folio. When a node, slot, or item is selected in the folio structure section of the page, information about what is selected is displayed in the element info section, where it can be modified. Modified information is written back to the XML file checked into 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 may be associated with several different folios, and the element information about that item may be different in each folio. It is important to remember that if you change the element information in one folio, it does not change in another folio.

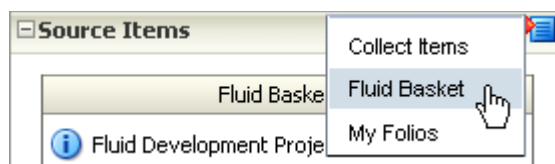
The type of information displayed by default on all elements includes name, description, and attributes. Slots and Content items also display the content ids of the items, as well as their creation date and last modification date. Hyperlinks display the URL of the link.

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	Clicking this link opens the content information page for the item in a separate window.
Native File	Clicking this link downloads the native file from Content Server.
Web Viewable Rendition	Clicking this link opens 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.

Information	Description
Description	<p>A description of the element to help identify its intended use. For example, a slot named <i>Field Report</i> could have a description of <i>Information gathered at the scene by first responders</i>.</p> <p>Displayed for all elements.</p>
Attributes	<p>Allowable uses and limitations of an element. Attributes are identical for slots and items, but differ for nodes.</p> <p>Default attributes for slots and items:</p> <ul style="list-style-type: none"> <li>❖ <b>Allow empty</b>—The slot can be empty.</li> <li>❖ <b>Lock content</b>—Items cannot be deleted from the slot.</li> <li>❖ <b>Removable</b>—The slot can be deleted.</li> <li>❖ <b>Allow external</b>—An external link can be specified for the slot.</li> <li>❖ <b>Restrict formats</b>—Specifies what content item formats are allowed to populate the slot.</li> <li>❖ <b>Allow folio</b>—Specifies whether or not a folio can populate the slot.</li> <li>❖ <b>Content profile</b>—Specifies the content profile used when adding an item by search or check in.</li> </ul> <p>Default attributes for nodes:</p> <ul style="list-style-type: none"> <li>❖ <b>Removable</b>—The node can be deleted.</li> <li>❖ <b>Children moveable</b>—Subnodes can be moved.</li> <li>❖ <b>Allow item creation</b>—An item can be created within the node.</li> <li>❖ <b>Allow node creation</b>—Subnodes can be created within the node.</li> <li>❖ <b>Maximum Items</b>—The total number of items that can be created within the node.</li> <li>❖ <b>Maximum Nodes</b>—The total number of nodes that can be created within the node.</li> <li>❖ <b>Content Profile</b>—Specifies the content profile used when adding an item by search or check in.</li> </ul>

Information	Description
Content ID	The unique identifier of a content item used by Content Server. Displayed for items and slots. Slots display this attribute as blank.
Create Date	The date a content item was created. Displayed for items and slots.
last modified	The date changes were last made to the content item. Displayed for items and slots.
link	The URL of the hyperlink. Displayed for hyperlinks only.

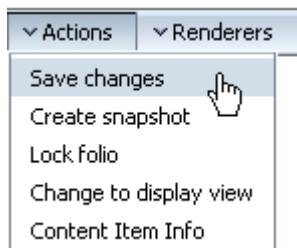
## Source Items Tray




The Source Items tray provides the ability to collect items checked into Content Server for use in the folio. The default allows you to search Content Server and display a listing of search results in the tray, from which you can select items to insert into the folio. This is useful if you have multiple items from a search result that you want included in your folio.

Additionally, the selection menu (📄) in the Source Items tray heading allows you to choose a content basket to display in the tray. This is useful if you have previously collected items in a content basket, and now want to add them to a folio.

## Actions Menu

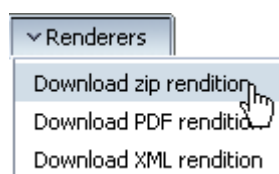


The Actions menu on the [Edit Folio Page](#) (page 3-7) allows you to access and control the folio versions checked into Content Server.

Item	Description
Save Changes	<p>Saves the folio and any changes to the folio. When saving a folio for the first time, the <a href="#">Set Folio Profile Page</a> (page 3-16) is displayed to initiate checking the folio in to Content Server. When saving subsequent changes, the graphic under the page title changes from <b>Unsaved Changes</b> to <b>Changes Saved</b>.</p> <p><b>Figure 3-2</b> Unsaved Changes and Changes Saved graphic</p>  <p>Note that 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.</p>
Create snapshot	Creates a new revision of the folio in Content Server. When a snapshot is created, the folio hierarchy displayed in the <a href="#">Folio Structure Tray</a> (page 3-8) 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 <a href="#">View Folio Page</a> (page 3-18).

Item	Description
Create editable revision	Creates a new, unlocked revision of a locked folio. This option is displayed only on the <a href="#">View Folio Page</a> (page 3-18) of a locked folio.
Change to display view	Displays the <a href="#">View Folio Page</a> (page 3-18).
Content Item Info	Displays the standard Content Server content information page for the folio.

## Renderers Menu



The Renderers menu on the [Edit Folio Page](#) (page 3-7) 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.

See [Downloading Folio Renditions](#) (page 2-13) for more information.

## SET FOLIO PROFILE PAGE

---

### Set Folio Profile

Select a content profile to be applied to the new folio, or leave set to 'none' to check in without a profile.

**Profile:**  

The Set Folio Profile page is accessed when you first select **Save folio** from the Actions menu of either the [Edit Simple Folio Page](#) (page 3-4) or [Edit Folio Page](#) (page 3-7). It allows you to select a Content Server profile for the folio if your system administrator has created any. For more information on profiles, see the section on content profiles in the *Content Server User Guide*.


## FOLIO CHECK IN PAGE

---


### Folio Check In


Use the form below to check the folio into the Content Server.

---

**Type**  

**Title**


**Author**   


**Security Group**  

**Content ID**

**Revision**

**Comments**

**Release Date**  

**Expiration Date**  



The Folio Check In page is accessed by clicking **Next** on the [Set Folio Profile Page](#) (page 3-16). It displays a modified Content Server check in form that allows you to specify metadata for the folio. For more information on the metadata field options on the check in form, see the *Content Server User Guide*.

## FOLIO CHECK IN CONFIRMATION PAGE

**Folio Check In Confirmation**

The following folio has been successfully checked into Content Server. Select a navigation option below and click Finish.

**Content ID:** CS003\_000019  
**Title:** Benefits  
**Title:** sysadmin

---

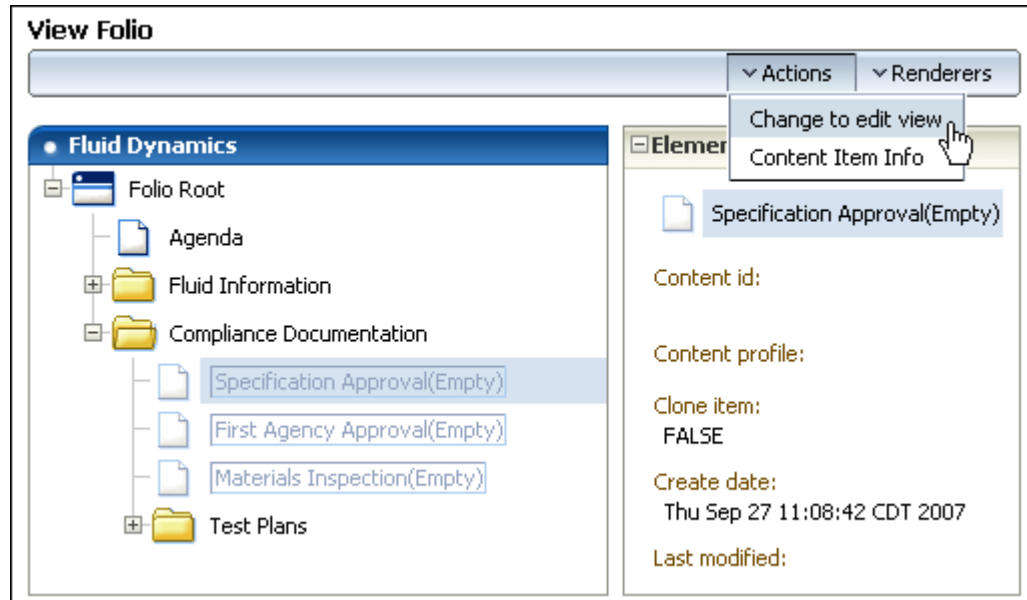
Continue editing the folio  
 View content information for the folio  
 View the folio

The Folio Check In Confirmation page is accessed by clicking **Check in** on the [Folio Check In Page](#) (page 3-16). It confirms the folio has been successfully checked into Content Server, and provides you with the following options of how to proceed when clicking **Finish**:

Option	Description
Continue editing the folio	Displays the <a href="#">Edit Simple Folio Page</a> (page 3-4) or <a href="#">Edit Folio Page</a> (page 3-7) of the folio checked in.
View content information for the folio	Displays the standard Content Server content information page for the folio.
View the folio	Displays the <a href="#">View Folio Page</a> (page 3-18) for the folio.

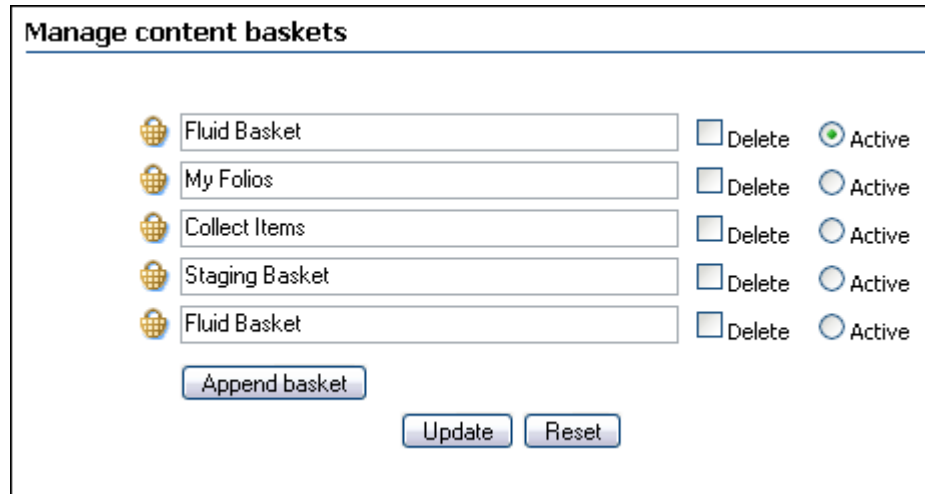
## VIEW FOLIO PAGE

---



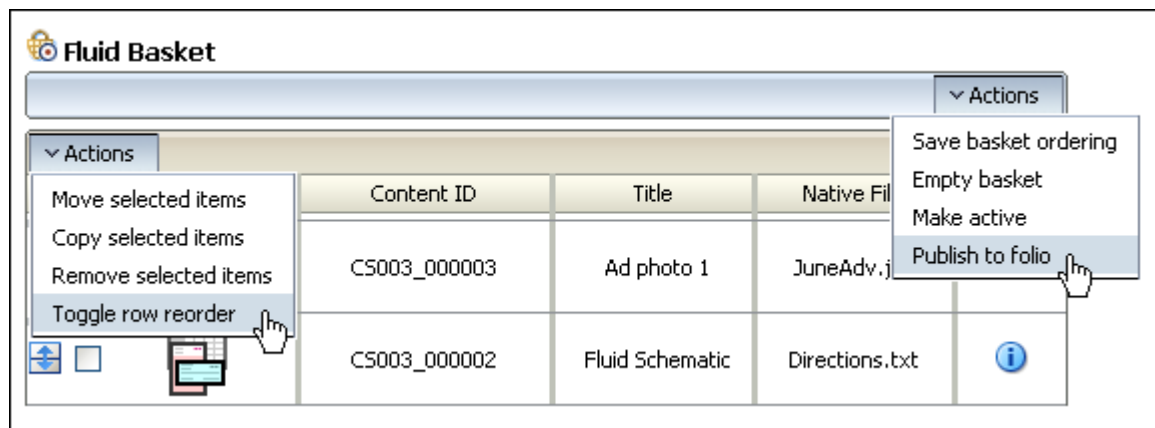
By default, the View Folio page is identical to the [Edit Folio Page](#) (page 3-7), displaying the folio as a folder hierarchy with nodes, slots, and items. However, because the folio is stored in Content Server as an XML file, your system administrator can create additional folio views to display folio structure in a way more relevant to your business, and may set a new default view. When displayed as a view, the folio cannot be edited.

## MANAGE CONTENT BASKETS PAGE




The Manage Content Baskets page is accessed by clicking My Baskets on the My Content Server tray, or by clicking Manage Baskets under the My Baskets folder on the My Content Server tray. The Manage Content Baskets page allows you to append, rename, or delete a content basket, and to set which is the active basket.

## CONTENT BASKET PAGE



The Content Basket page is accessed by clicking a basket under the My Baskets folder on 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.

Item	Description
Thumbnail Column	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.
Native File	Displays the name of the native file of the content item.
Info	Clicking the info icon displays the content information page of a content item.
Table Actions Menu	<p>The table actions menu lists actions that can be applied to any selected item or items in the content basket.</p> <ul style="list-style-type: none"> <li>❖ <b>Move selected items</b>—Displays the <a href="#">Move/Copy Basket Items Page</a> (page 3-21), allowing you to select a different basket in which to move the item.</li> <li>❖ <b>Copy selected items</b>—Displays the <a href="#">Move/Copy Basket Items Page</a> (page 3-21), allowing you to select an additional basket in which to copy the item.</li> <li>❖ <b>Remove selected items</b>—Removes selected items from the content basket.</li> <li>❖ <b>Toggle row reorder</b>—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.</li> </ul>

Item	Description
Page Actions Menu	<p>The page actions menu lists actions that can be applied to the entire content basket.</p> <ul style="list-style-type: none"> <li>❖ <b>Save basket ordering</b>—Saves any changes made to row order using the Toggle row reorder action from the Table Actions menu.</li> <li>❖ <b>Empty basket</b>—Removes all items from the content basket.</li> <li>❖ <b>Make active</b>—Makes the displayed basket the active basket. Content items in Content Server can be added only to the active basket.</li> <li>❖ <b>Publish to folio</b>—When selected, all items in the content basket will be added to a new advanced folio with a flat hierarchy.</li> </ul>

## MOVE/COPY BASKET ITEMS PAGE



The Move/Copy Basket Items page is accessed by selecting a content item or items in a content basket from the [Content Basket Page](#) (page 3-19), and selecting 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.

# INSERT HYPERTEXT PAGE

---

**Insert Hypertext**

Enter a label and HTML link to show up as an item in the folio.

**Label:**

**HTML Link:**

The Insert Hypertext page is accessed by selecting Insert Hypertext from the [Folio Structure Contextual Menu](#) (page 3-8) on the [Edit Folio Page](#) (page 3-7). It allows you to 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, <a href="http://templates.company.com">http://templates.company.com</a> .

## SUBSCRIBE TO <FOLIO\_NAME> PAGE

---

**Subscribe to "My Simple Folio"**

---

**Subscribe to This Item**

---

If you want to receive an email notification each time a new revision of **"My Simple Folio"** becomes available, click the [Subscribe](#) link below.

[ [Subscribe](#) ]

Action	Description	
Child update	This will notify on any change to content linked to by this folio.	<input type="checkbox"/>
Add	This will notify when anything is added to this folio.	<input type="checkbox"/>
Modify	This will notify when attributes are modified in this folio.	<input type="checkbox"/>
Delete	This will notify when anything is deleted from this folio.	<input type="checkbox"/>

The Subscribe to <folio\_name> page is accessed by selecting Subscribe from the page Actions menu of a Content Server content information page for a folio. Selecting the desired actions from the list and clicking Subscribe notifies you when the actions have occurred. For more information on subscriptions, see the *Content Server User Guide*.





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version 1.2.3, July 18th, 2005

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